GMCA GREATER MANCHESTER COMBINED AUTHORITY

Greater Manchester

Strategic Housing Market Assessment

January 2019

Note to reader

Please note that some of the data tables in this report include rounded figures. This can result in some column or row totals not adding up to 100 or to the anticipated row or column 'total' due to the use of rounded decimal figures.

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Contents

Executive summary

This Strategic Housing Market Assessment (SHMA) has been produced for the Greater Manchester Combined Authority (GMCA). The purpose of the SHMA is to present a clear, evidenced picture of the Greater Manchester housing market and how it is changing, to provide an assessment of future needs for both market and affordable housing, and to explore the housing needs of different groups within the population over the next twenty years. To do that, this SHMA includes a great deal of detailed information and analysis, and any 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 which, 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 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 proposed new standard methodology, we calculate an annual housing need for Greater Manchester of 10,583 new homes per year. Chapter 3 sets out that calculation in more detail.

With 2.8 million people living in 1.2 million homes across ten districts, Greater Manchester and our residents are of course hugely diverse. At a headline level, we can say that:

- we are relatively youthful, with over 20% of residents under 30
- while numbers in the older age groups are growing fast too
- we are slightly more ethnically diverse than England and Wales as a whole
- more of us live alone than in any other type of household
- 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 we have high levels of deprivation
- homelessness and rough sleeping have risen in recent years
- 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

- 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
- around one in twenty households are in overcrowded accommodation, concentrated in the rented sector
- two-thirds of households (and 80% of owner-occupiers) have 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 as a whole have remained substantially below national averages. Between 2007 and 2017, our average price paid rose by 11% to £158,000, compared to a 24% increase to £233,000 in England and Wales as a whole. Our private rents are also lower than national averages – our average monthly rent in 2017/18 was £595, compared to £675 in England as a whole. But, given our relatively low average household incomes, that still means that many of us find meeting housing costs a challenge.

Average figures for Greater Manchester mask patterns within the city region. For both buying and renting Trafford and Stockport averages are significantly higher than Greater Manchester as a whole, while rents in Manchester are also higher, reflecting the city centre market. And in all districts, the variations between neighbourhoods can be substantial.

One in five homes in Greater Manchester are in the social housing sector, and around 95% of those are rented at social rents, which are generally substantially below private sector rents. Even so, over 85,000 households were on local authorities' housing registers in 2016/17, of which almost 26,000 were assessed as having a priority need for a home.

New housebuilding continues to slowly recover from the post-2008 collapse in delivery, with the 2017/18 total of almost 9,000 net additional homes being the highest since 2007/08, driven by new developments in the central areas of Salford and Manchester. Empty dwellings are at their lowest levels, and matching that of England as a whole, 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 nearly three in twenty of us will be 75 years or older - and one in twenty 85 or older – though our population profile will still be younger than the national average. At the same time, the number of homes needed for families with dependent children will grow by almost 10%, though almost all of that growth will be in families with only one child. 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 housing sector is 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 trends more families with children and older households will rent privately. Chapter 6 looks more closely at the housing requirements of different groups.

It's important that our residents are able to 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 we need. Using that gives a figure of 4,678 households per annum. That is not a target for building new affordable house building through the planning system, but it is something we need to consider in developing the Greater Manchester Spatial Framework, and in our work with Homes England, housing providers and other partners to deliver the affordable homes we need for the future.

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 It supports the aspirations in the Greater Manchester Strategy (GMS)[1], 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 GMS 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 second draft of the Greater Manchester Spatial Framework (GMSF). The GMSF provides a spatial and physical interpretation of the Greater Manchester Strategy 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[2] and sets out evidence to inform the overall housing requirements for the conurbation and the ten individual local authorities, which will be set through the Greater Manchester Spatial Framework. These requirements will need to be informed by the SHMA but will also take into account a range of other evidence, including those relating to land supply; Green Belt; other development constraints (such as flooding and areas of environmental protection) and infrastructure.

[1] Available at: https://www.greatermanchester-ca.gov.uk/who-we-are/the-greater-manchester-strategy/
[2] Greater Manchester is comprised of the following unitary authorities: Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Stockport, Tameside, Trafford and Wigan.

1.5 The SHMA also provides evidence that will be used to inform other housing-related activities of the GMCA, including the forthcoming Greater Manchester Housing Strategy, as well as the local plans and strategies of individual districts.

1.6 This SHMA responds to and is compliant with the current requirements of both the National Planning Policy Framework (NPPF)[3] and the planning practice guidance (PPG).[4] 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 most recent comprehensive assessment for Greater Manchester was produced in October 2016. This SHMA presents the most up-to-date analysis of the Greater Manchester housing market and supersedes that which was consulted on from 31 October 2016 to 16 January 2017.

Map 1.1: Greater Manchester districts

Source: MappingGM

[3] National Planning Policy Framework (NPPF), July 2018.
[4] Planning practice guidance (PPG), first published in March 2014 and subject to on-going updates - latest September 2018.

1.2 Policy background

National Planning Policy Framework

1.8 The National Planning Policy Framework (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. It requires plans to be justified and based on proportionate evidence, taking into account relevant market signals.

1.9 The NPPF was published in July 2018. Paragraph 11 of the NPPF sets a presumption in favour of sustainable development whereby local plans should meet objectively assessed development needs, with sufficient flexibility to respond to rapid change.

1.10 Paragraph 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 different groups in the community.

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 take into account relevant market signals. This Strategic Housing Market Assessment brings together relevant evidence to comply with this.

Planning practice guidance

1.12 Planning practice guidance (PPG) was issued by Government in March 2015 and updated in September 2018, and contains guidance on 'Housing need assessment.'[5] This provides advice on how key elements of the NPPF should be interpreted, including the approach to deriving an assessment of Local Housing Need. The approach used in this report takes account of the PPG.

[5] Available at: https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments

1.13 Relevant NPPF and planning policy guidance is outlined throughout this document and provides the basis for which the evidence is presented in the corresponding chapters of this SHMA.

Local Housing Need methodology

1.14 On 14 September 2017 Government published a wide ranging consultation entitled "Planning for the right homes in the right places."[6] This followed the publication of the Housing White Paper, *Fixing our broken housing market,* in the spring of 2017[7] which included a proposed standardised national methodology for calculating housing need.

1.15 The consultation ran until 9 November 2017, and in March 2018 Government published their response to this consultation which concluded their Local Housing Need as the most appropriate method to assess need.[8]

1.16 Government subsequently published the revised National Planning Policy Framework in July 2018, which however set out plans to "consider adjusting the [Local Housing Need] method after the household projections[9] are released in September 2018."[10] On 26 October 2018, Government released their consultation to update planning practice guidance on housing need assessment (and the Local Housing Need methodology), taking account of the 2016-based household projections.[11] Specifically they propose "*that the 2014-based data will provide the demographic baseline for assessment of local housing need.*"

1.17 The consultation closed on 7 December 2018 and at the time of writing (January 2019) the Government have yet to publish their formal response. In

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[6] Available at: https://www.gov.uk/government/speeches/local-housing-need

[7] Government Housing White Paper. *Fixing our broken housing market*. February 2017. Available at: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/590464/Fixing_our_broken_housing_market_-_print_ready_version.pdf

[8] Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/system/uploads/attachment_data/file/685293/Government_response_to_Planning_for_the_right_homes_in_the_right_places_consultation.pdf

[9] As of 23 January 2017, responsibility for household projections transferred from the then Department of Communities and Local Government to the Office for National statistics.

[10] See: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/728498/180724_NPPF_Gov_response.pdf pp.25-26

[11] Available at: https://www.gov.uk/government/consultations/changes-to-planning-policy-and-guidance-including-the-standard-method-for-assessing-local-housing-need

light of this, this report uses the Local Housing Need methodology as consulted on between 26 October 2018 and 7 December 2018, which is 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 Greater Manchester.

1.19 The report is structured as follows;

- **Chapter 2** considers the definition of the Housing Market Area;
- **Chapter 3** sets out the Greater Manchester Local Housing Need;
- **Chapter 4** presents characteristics of the Housing Market Area;
- **Chapter 5** reviews housing market signals including affordability;
- **Chapter 6** presents the housing needs of particular groups; and
- **Chapter 7** provides an affordable housing need assessment.

1.20 The report includes a substantial technical appendix in Chapter 8, which provides detailed material that underpins the core outputs of the SHMA and, where relevant, lower level data and summaries of findings for Greater Manchester districts.

2 | Defining the Housing Market Area

Households moving into a home in Greater Manchester

Already living here

Living outside here

Greater Manchester workers

Nine in every ten people working in Greater Manchester lives here

Only one in ten commutes from outside

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've 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 edges of Greater Manchester and lower for Manchester and Salford, which are the main arrival destinations for households moving to 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 workers travel outside Greater Manchester to 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. But this is not universal and Greater Manchester's ten districts all have areas of both high and low value, sometimes in relatively close proximity.

So, while Greater Manchester has important and valuable relationships with neighbouring districts and further afield, we can reasonably define it as a housing market area 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 floorspace that should be planned for through the Greater Manchester Spatial Framework; and
- To consider the implications of those areas of assessment for translating the geography of need/demand into district requirements for housing and employment floorspace in the Greater Manchester Spatial Framework.

National guidance

2.2 Paragraph 32 of the PPG states that authorities must have a clear understanding of housing needs in their area, in part by working with key stakeholders to establish the Housing Market Area as the most appropriate geography over which to prepare policies to meet housing need.

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 010 Reference ID: 61-010-20180913)

2.4 Paragraph 010 Reference ID: 61-010-20180913 of the PPG states that housing market areas can be broadly defined by using three different sources of information, which are detailed below:

- **House prices and rates of change in house prices**
  Housing market areas can be identified by assessing patterns in the relationship between housing demand and supply across different locations. It enables the identification of areas which have clearly different price levels compared to surrounding areas.
- **Household migration and search patterns**
  Analysis of migration flow patterns can help to identify these relationships and the extent to which people move house within an area. The findings can identify the areas within which a relatively high proportion of household moves are contained. This excludes long distance moves (for example, those due to a change of lifestyle or retirement), reflecting the fact that most people move relatively short distances due to connections to families, friends, jobs and schools.

- **Contextual data (for example travel to work area boundaries and school catchment areas)**
  Travel to work areas can provide information about commuting flows and the spatial structure of the labour market, which will influence household price and location. They can also provide information about the areas within which people move without changing other aspects of their lives (for example, work or service use).

2.5 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

2.6 The use of migration data in the identification of housing market areas tends to focus on determining when self-containment levels reach a particular threshold. The threshold of 70% is deemed to be appropriate for this exercise, as it was the level referred to in the previous PPG dated March 2015.[12] The data also helps to establish the levels of connectivity between places.

2.7 Migration data from the 2011 Census can be used to identify self-containment rates of districts, by examining the original addresses of those who moved into Greater Manchester from England and Wales in the year preceding the census.

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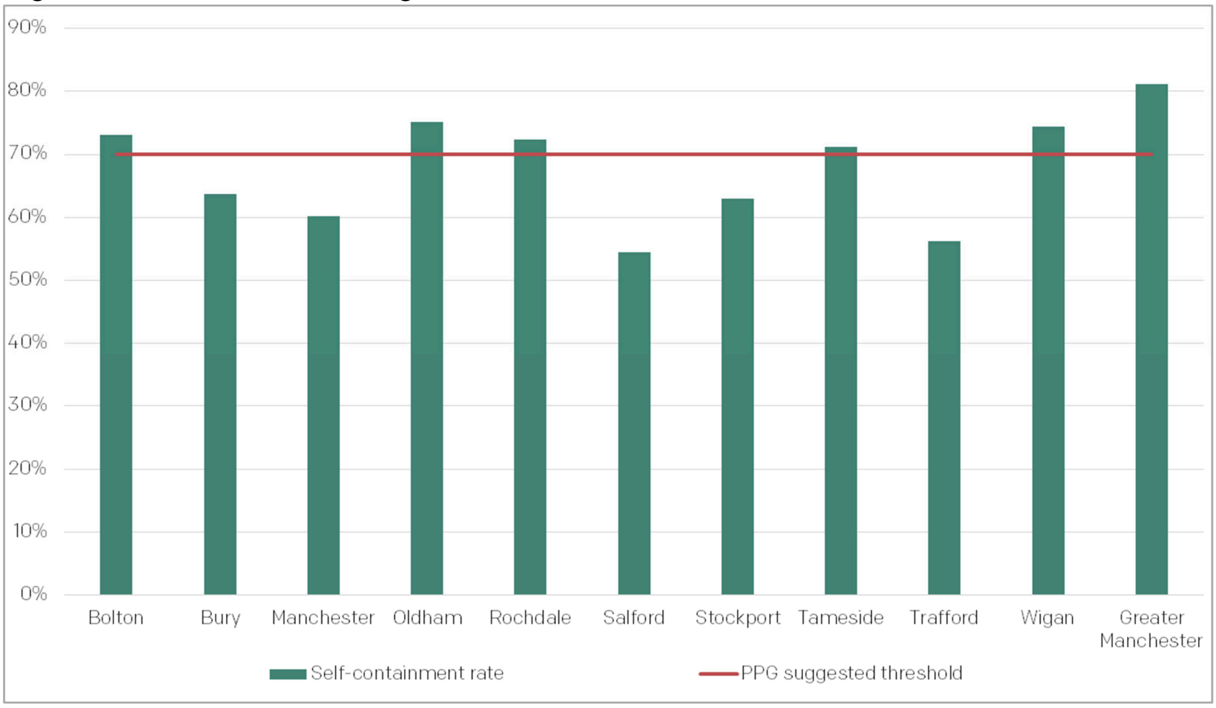
[12] Archived Planning Practice Guidance, Housing and Development Needs Assessments, available at: http://webarchive.nationalarchives.gov.uk/20180607114246/https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments

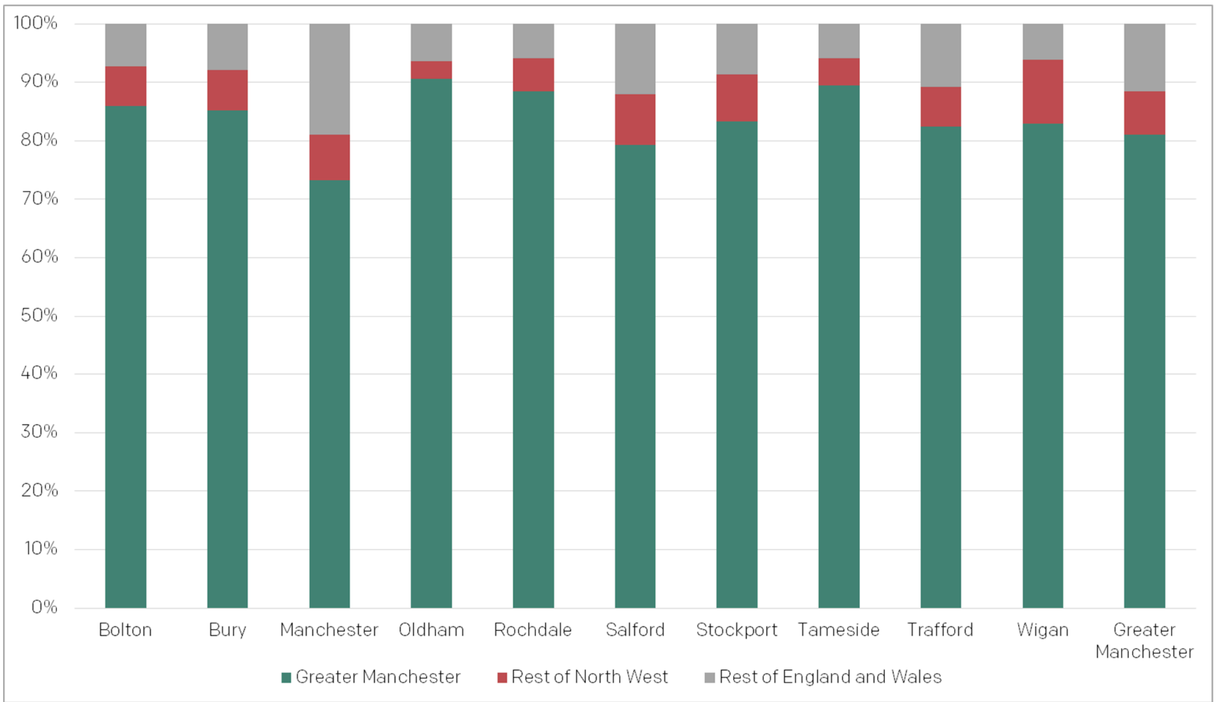
Figure 2.1: Self-contained migration in Greater Manchester districts, 2011



Source: Census 2011

2.8 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. Broadly the northern districts of Greater Manchester (Oldham, Wigan, Bolton, Rochdale and Tameside) are more self-contained than those in the south (Stockport, Manchester, Trafford and Salford) with the notable exception of Bury. However, when taken as a whole, Greater Manchester has a self-containment rate of 81%, far higher than any of the figures for the individual districts, suggesting a level of interdependence between districts in the conurbation.

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



Source: Census 2011

2.9 Figure 2.2 shows that of those who moved to an address in Greater Manchester from England and Wales in the year preceding the 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 and Wales.

2.10 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 Lancashire.

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

Origin- moved from	Destination- moved to										
	Bolton	Bury	Manchester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan	Greater Manchester
Bolton	73.0%	3.9%	0.5%	0.3%	0.5%	2.2%	0.4%	0.3%	0.7%	3.1%	7.4%
Bury	2.8%	63.7%	0.9%	1.0%	2.6%	2.7%	0.4%	0.6%	0.9%	0.3%	4.7%
Manchester	1.7%	6.5%	60.2%	4.8%	5.1%	10.6%	11.4%	6.7%	16.2%	1.2%	24.4%
Oldham	0.5%	1.0%	1.1%	75.2%	4.8%	0.8%	0.4%	3.3%	0.4%	0.3%	6.0%
Rochdale	0.6%	3.5%	0.8%	4.1%	72.3%	1.1%	0.5%	0.7%	0.6%	0.2%	5.9%
Salford	3.0%	4.1%	2.9%	0.7%	1.2%	54.5%	1.4%	1.1%	4.0%	2.5%	7.7%
Stockport	0.3%	0.4%	2.4%	0.3%	0.5%	1.0%	62.9%	4.8%	1.8%	0.3%	6.2%
Tameside	0.2%	0.7%	1.1%	3.4%	0.7%	1.1%	3.7%	71.1%	0.8%	0.2%	5.7%
Trafford	0.5%	1.0%	2.8%	0.3%	0.4%	3.2%	1.9%	0.6%	56.2%	0.4%	5.5%
Wigan	3.4%	0.5%	0.6%	0.2%	0.3%	2.2%	0.3%	0.3%	0.8%	74.4%	7.5%
Greater Manchester	86.0%	85.2%	73.3%	90.6%	88.5%	79.3%	83.3%	89.5%	82.4%	83.0%	81.1%
Rest of England and Wales	14.0%	14.8%	26.7%	9.4%	11.5%	20.7%	16.7%	10.5%	17.6%	17.0%	18.9%

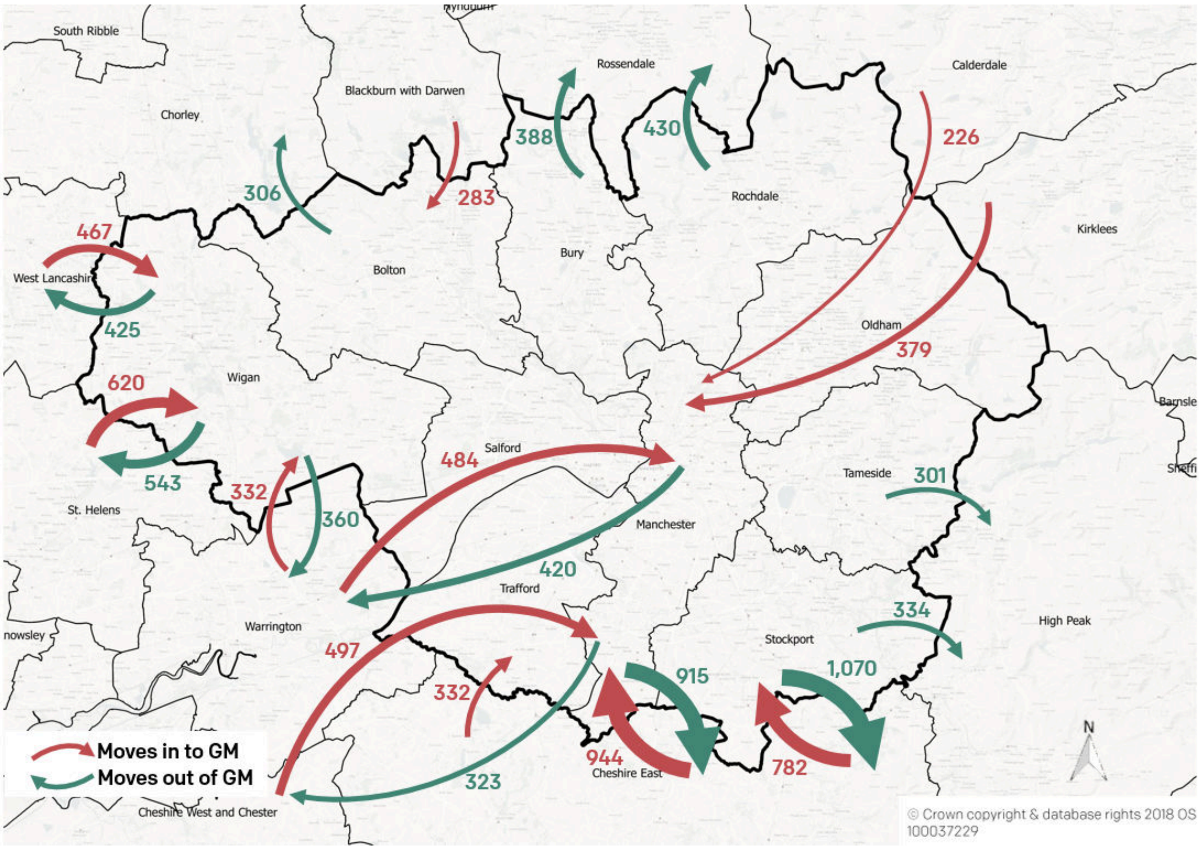
Source: Census 2011

2.11 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. It 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 and Wales. Broadly it can be seen 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 at 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.

2.12 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 housing market area (HMA).

Map 2.1: Absolute migration flows into and out of Greater Manchester and surrounding districts, 2011



Source: Census 2011

2.13 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 in particular having relationships with Cheshire East, Cheshire West and Chester, Warrington and to a lesser extent Kirklees. Wigan also has a number of 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 particular relationships with Rossendale and to a lesser extent Bolton with Chorley.

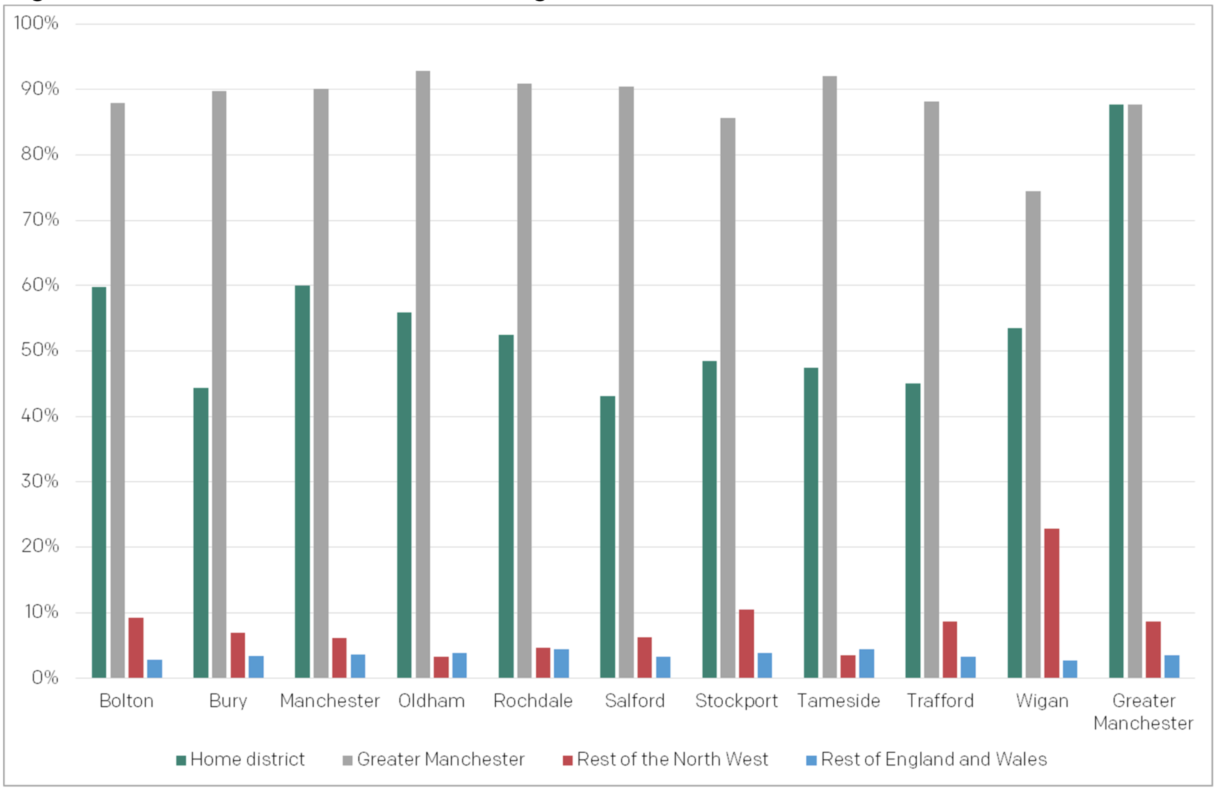
2.14 The analysis also shows that flows out of Greater Manchester are generally slightly stronger than flows in (with the exception of Manchester), leading to a small net loss in population to the surrounding districts. The largest net outflows are seen in the east of Greater Manchester, with around 300 more moves from Stockport to Cheshire East than vice versa, and around 60 more moves from Tameside to High Peak than vice versa.

2.15 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

2.16 Commuting patterns have been analysed both in terms of where Greater Manchester residents work and 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 also resident in the conurbation.

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

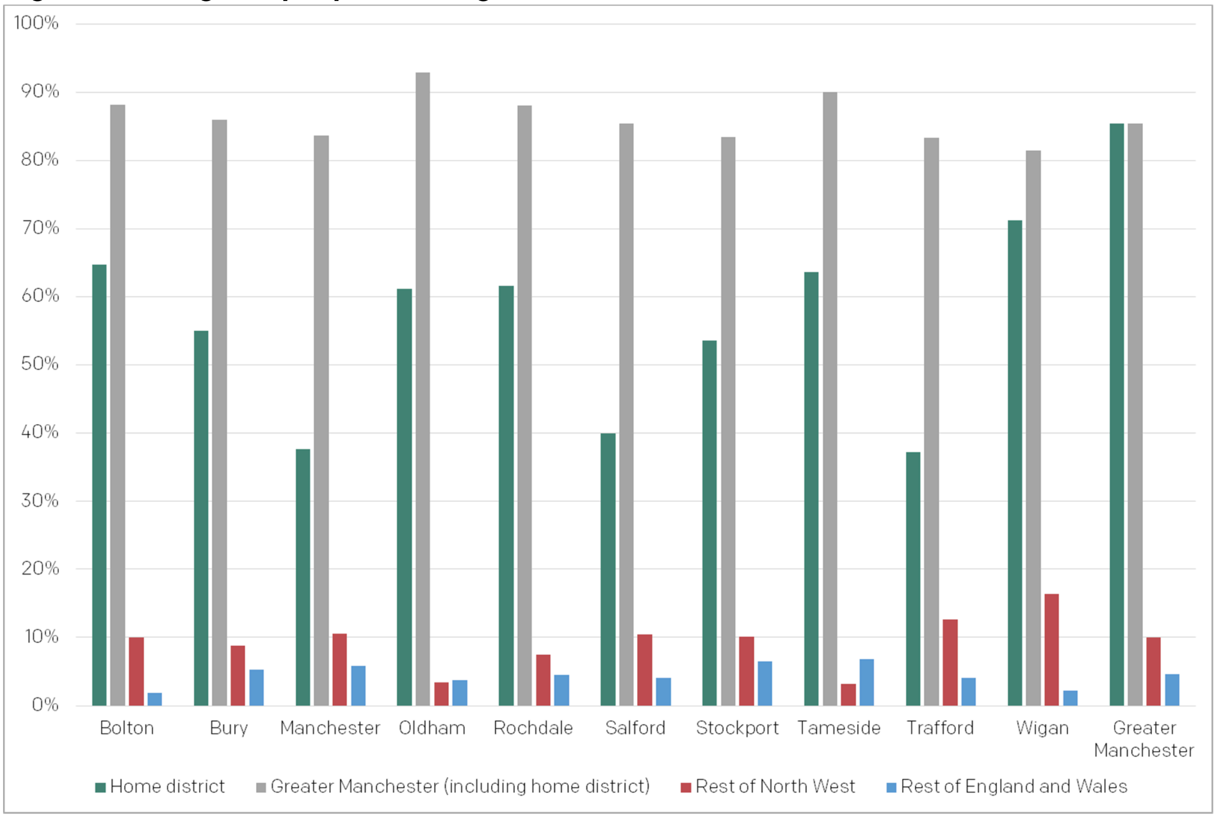


Source: Census 2011

2.17 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 around 40%. Wigan is the only district where fewer than 85% of its workers work 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.

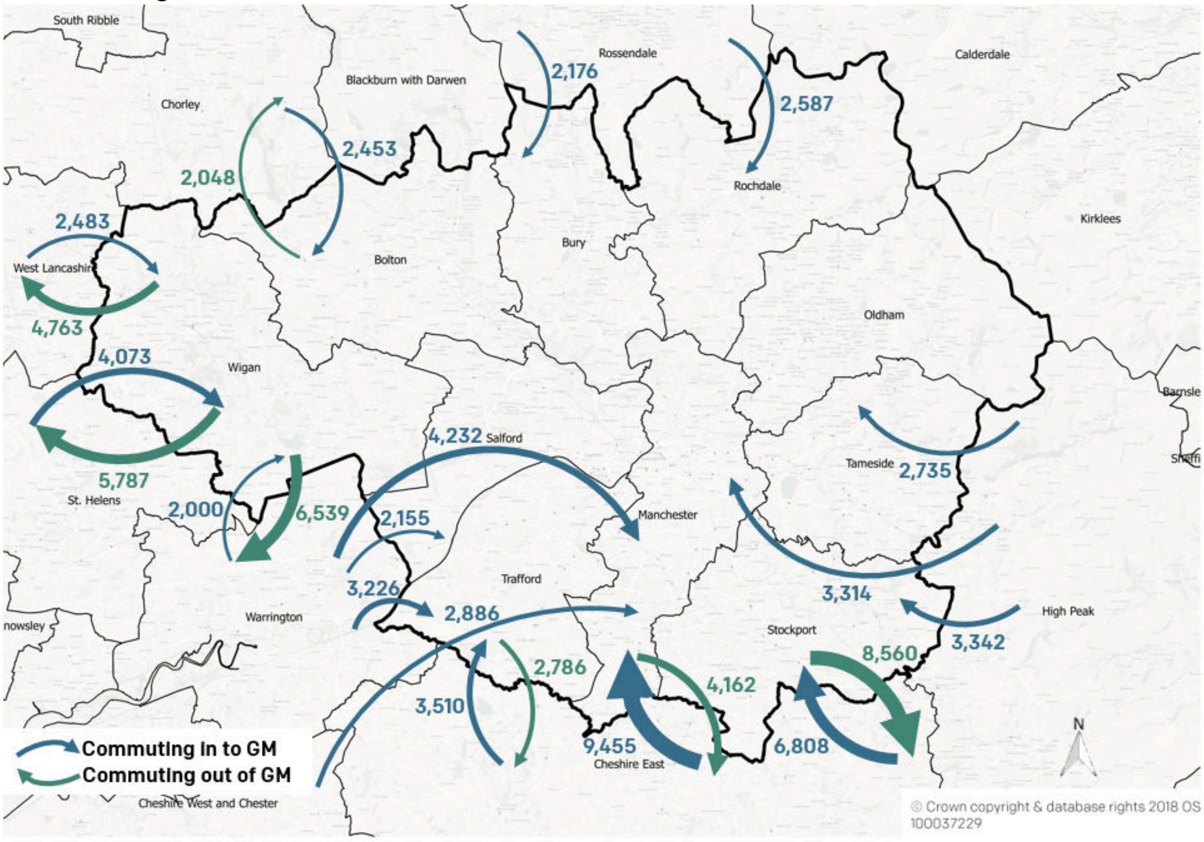
Figure 2.4: Origin of people working in each Greater Manchester district, 2011



Source: Census 2011

2.18 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



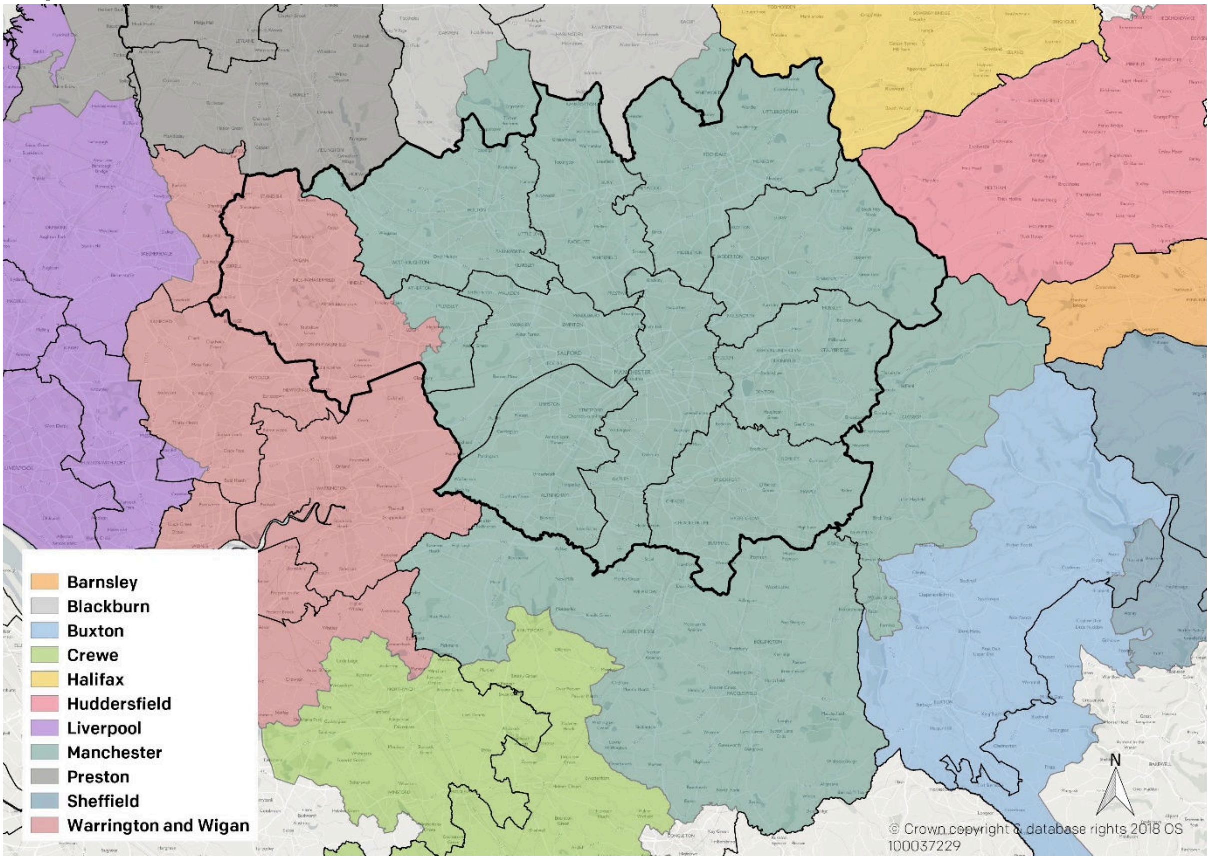
Source: Census 2011

2.19 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, Stockport and Trafford attracting more commuters from the southern and eastern neighbouring districts than residents commuting out. There are also draws in the north of Greater Manchester with Bury and Rochdale attracting a number of commuters from Rossendale, and Bolton attracting commuters from Chorley.

2.20 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.

2.21 Another source of commuting data is the Office for National Statistics (ONS) Travel to Work Areas (TTWAs).

Map 2.3: Travel to Work Areas, 2011



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

2.22 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 large proportion of Cheshire East and Cheshire West, as well as High Peak.

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

2.4 House prices

2.24 PPG states that house prices can be analysed in order to identify areas in which house prices are significantly different from those in other neighbouring areas, as well as providing information about differences across the area in terms of the price people pay for similar housing, market 'hotspots', low demand areas and volatility (PPG Paragraph 010 Reference ID: 61-010-20180913).

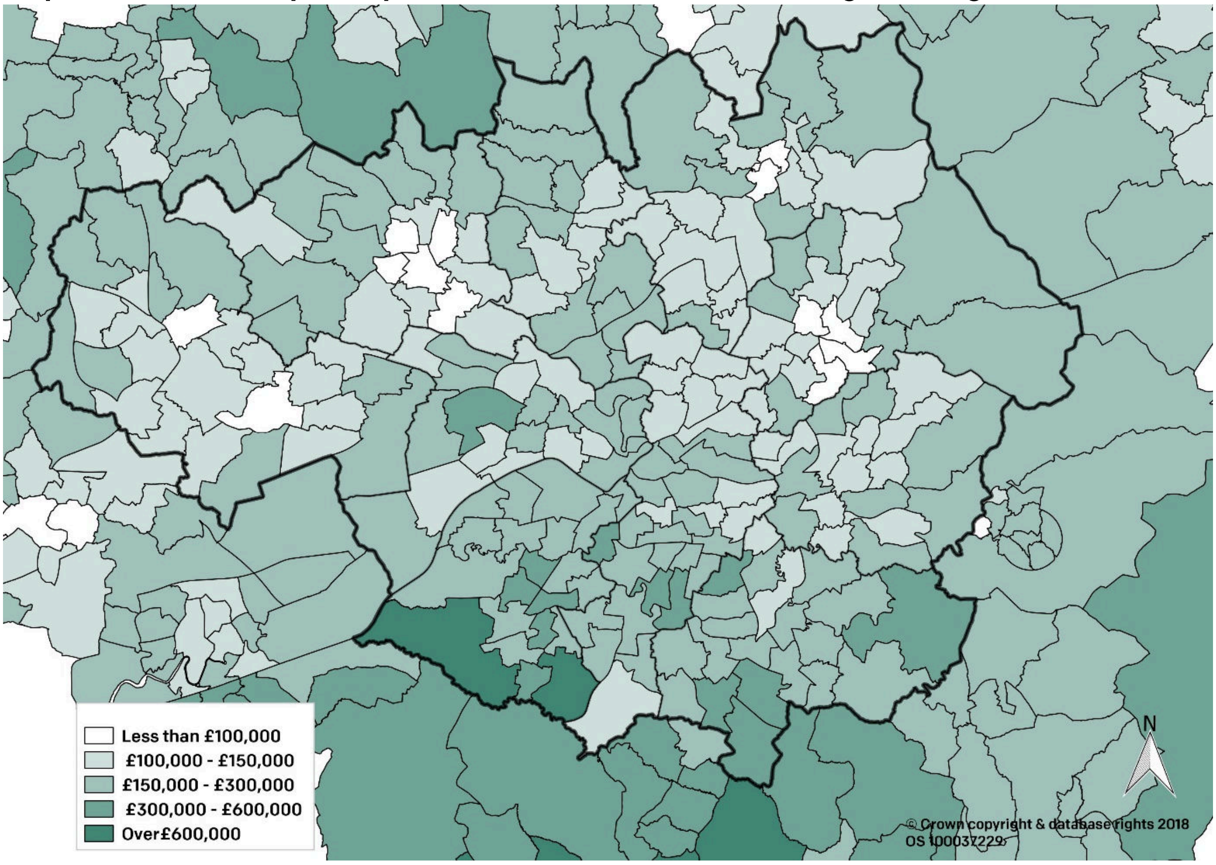
2.25 House prices are affected in the short-term by factors such as economic and market conditions, employment trends, migration patterns and interest rates and mortgage availability. Longer-term, population and economic trends such as changing household formation rates and sizes of households have an impact on demand for housing of different types.

2.26 House prices are also affected by a number of 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.

2.27 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.

Map 2.4: Residential prices paid, Greater Manchester and neighbouring wards, 2017

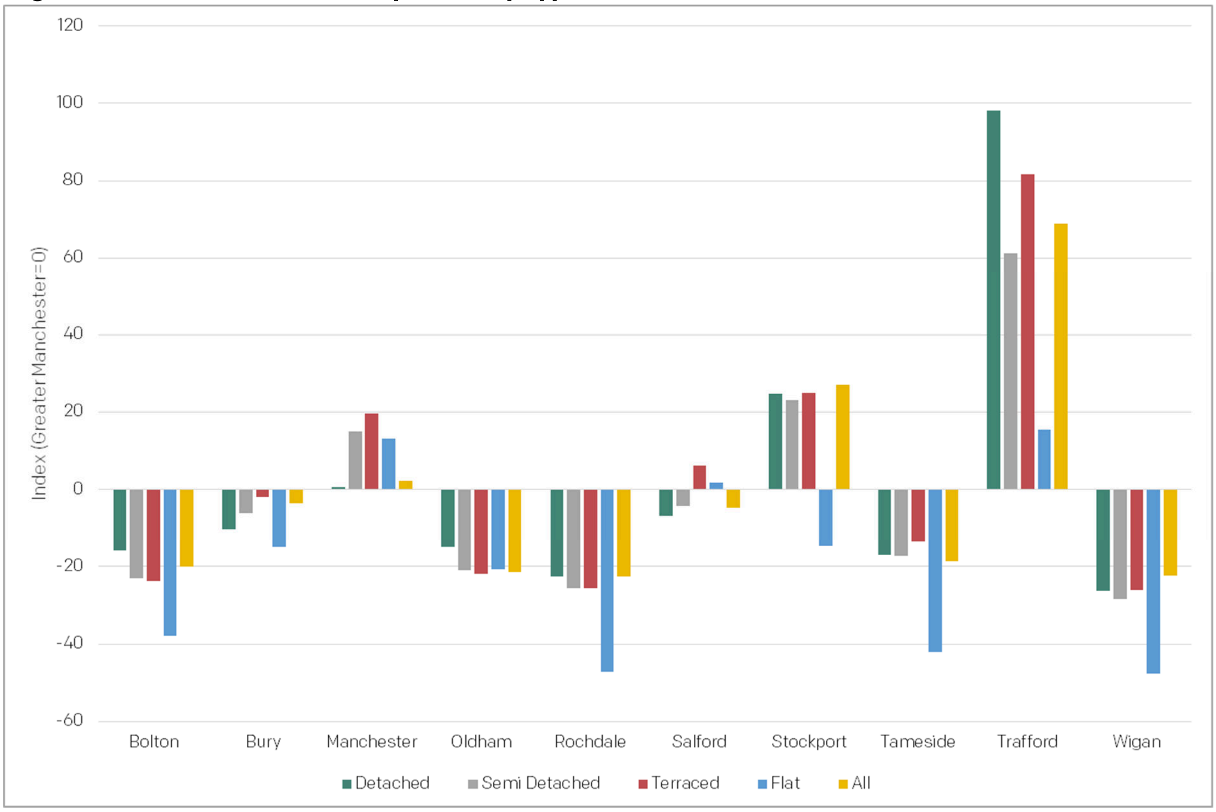


Source: H M Land Registry Price Paid Data, 2017

2.28 Map 2.4 shows H M Land Registry House Price Paid data for 2017 at ward level. The map reveals some clear variations within Greater Manchester, with areas including the south of Trafford and Stockport as well as Saddleworth in Oldham presenting higher house prices than those seen in town centres in the north of Greater Manchester.

2.29 The wards surrounding Greater Manchester present a mixed picture, with wards to the north of Bolton and Bury and 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.

Figure 2.5: Mean residential prices by type in Greater Manchester districts, 2017



Source: H M Land Registry House Price Paid Data, 2017

2.30 The chart above shows that all house types in Bolton, Bury, Oldham, Rochdale, Tameside and Wigan are below the Greater Manchester average. This is particularly the case for flats in Rochdale, Wigan, Tameside and Bolton. Apart from flats, Trafford is consistent across the types in showing the most difference compared to the Greater Manchester average.

2.5 Summary

2.31 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.

2.32 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).

2.33 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 seen as follows:

- To the south and east of Greater Manchester there are strong connections to Cheshire West and Chester, Cheshire East, 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.

2.34 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.

2.35 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.

2.36 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.

2.37 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; net in-migration in the west and net out-migration in the east. There is also a very extensive in-migration catchment for the core of the conurbation that is then 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.

2.38 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.

2.39 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 Housing Market Area. 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, and this is the approach adopted in this SHMA.

3 | Local Housing Need

Official household projections

House prices to earnings =
affordability ratio

Uplift for affordability
if ratio is above four

Cap level of uplift if required

Baseline 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.

So they have proposed a new standard methodology to calculate a figure for 'local housing need'. This is not yet fully finalised, but we have used it to work out an annual housing need figure for Greater Manchester as a whole of 10,583 new homes per year. This includes an uplift of 1,218 homes per year to take account of signs that housing is becoming less affordable in Greater Manchester.

The total housing need figure is worked out district by district and added together to give a Greater Manchester total figure. But, if it makes sense, we can decide to share out that total between districts differently, through the Greater Manchester Spatial Framework process.

3.1 Introduction

3.1 In September 2017, Government consulted on a new standardised way of assessing housing demand at local authority level, following a commitment in the February 2017 Housing White Paper[13] to bring forward a standard methodology for an "honest assessment" of housing need.

3.2 The consultation ran until 9 November 2017, and in March 2018 Government published their response to this consultation which concluded their Local Housing Need as the most appropriate method to assess need.[14]

3.3 The household projections are an important input into the Local Housing Need calculation, and the latest 2016-based projections[15] show lower household growth than previously forecast. Government are clear that the outputs from the methodology must be consistent with their commitment to deliver 300,000 homes per year by the mid-2020s in England[16] – this ambition first set out in the autumn Budget 2017.[17] Government subsequently published the revised National Planning Policy Framework in July 2018, which set out plans to "consider adjusting the [Local Housing Need] method after the household projections[18] are released in September 2018."[19]

3.4 On 26 October 2018, Government released their consultation to update planning practice guidance on housing need assessment (and the Local Housing Need methodology), taking account of the 2016-based household projections.[20] Specifically they propose:

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[13] See: https://www.gov.uk/government/speeches/local-housing-need
[14] Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/system/uploads/attachment_data/file/685293/Government_response_to_Planning_for_the_right_homes_in_the_right_places_consultation.pdf
[15] Available at: https://www.ons.gov.uk/releases/2016basedhouseholdprojectionsinengland
[16] Available at: https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments
[17] Available at: https://www.gov.uk/government/publications/autumn-budget-2017-documents/autumn-budget-2017
[18] As of 23 January 2017, responsibility for household projections transferred from the then Department of Communities and Local Government to the Office for National statistics.
[19] See: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/728498/180724_NPPF_Gov_response.pdf pp.25-26
[20] Available at: https://www.gov.uk/government/consultations/changes-to-planning-policy-and-guidance-including-the-standard-method-for-assessing-local-housing-need

1. For the short-term, to specify that the 2014-based data will provide the demographic baseline for assessment of local housing need.
2. To make clear in national planning practice guidance that lower numbers through the 2016-based projections do not qualify as an exceptional circumstance that justifies a departure from the standard methodology; and
3. In the longer term, to review the formula with a view to establishing a new method … by the time the next projections are issued.

3.5 The consultation closed on 7 December 2018 and at the time of writing (January 2019) the Government have yet to publish their formal response. In light of this, this report uses the Local Housing Need methodology as consulted on between 26 October 2018 and 7 December 2018.

3.2 Methodology

3.6 The LHN methodology consists of three components. The first step is to set a demographic baseline, similar to the previous objectively assessed housing need (OAN) methodology. 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. The methodology, as consulted on between 26 October 2018 and 7 December 2018, only differs from the current PPG in terms of setting the demographic baseline; the other steps remain the same.

3.7 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. The consultation states that "In such cases we propose that the housing need for the defined area should be the sum of the local housing need for each local planning authority. It will be for the relevant planning authorities or elected Mayor to distribute this total housing need figure across the plan area." [21] Therefore, the LHN has been calculated for each of the ten local authorities within Greater Manchester and summed to provide a Greater Manchester Local Housing Need figure.

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[21] Ibid

Step 1: Setting the baseline

3.8 As described above, the starting point for the LHN calculation is projections of future household growth. The current PPG recommends that the latest ONS household projections by local authority area are used.[22] The latest available published data is the 2016-based household projections, released in June 2018.

3.9 The household projections are derived using the ONS subnational population projections (SNPP), which provide projections of the future size and age structure of the population of regions and local authorities in England. The 2016-based household projections are derived from the 2016-based SNPP, which was released in May 2018.[23] These population projections showed significantly lower projected growth than the 2014 projections, which resulted in lower projected households under the 2016-based household projections.

3.10 As previously stated, the 2016-based household projections did not meet Government's ambition to build 300,000 homes per year, and as such the methodology consulted on between 26 October 2018 and 7 December 2018 states that the 2014-based household projections should continue to be used. Consequently, this analysis uses the 2014-based household projections to set the demographic baseline.

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

3.12 It is noted that these projections should be seen as the minimum housing need figure for the area. The 2014-based projections for Greater Manchester local authorities are set out below.

[22] See: https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments
[23] For more information on the 2016-based SNPP, see Population projections in Chapter 4.

Table 3.1: Household growth projections for Greater Manchester, 2018-2028

Area	Total household growth, 2018-28	Average annual household growth over 10 year period
Bolton	7,341	734
Bury	5,256	526
Manchester	23,826	2,383
Oldham	6,532	653
Rochdale	4,667	467
Salford	12,455	1,246
Stockport	8,895	889
Tameside	5,766	577
Trafford	10,202	1,020
Wigan	8,714	871
Greater Manchester	93,654	9,365

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

3.13 For Greater Manchester as a whole, these base projections would therefore imply an annual need figure of 9,365 dwellings per annum.[24]

Step 2: An adjustment to take account of market signals

3.14 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.

3.15 As with previous methods for assessing housing need, the methodology states that an adjustment should be made to take into account market signals, specifically the 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.

3.16 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

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

takes into account the fact that if areas have higher house prices, they are not necessarily 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 2017 data, released in April 2018.

3.17 The modelling proposes that "each one per cent increase in the ratio of house prices to earnings above four results in a quarter of a per cent increase in need above projected household growth." The threshold of four was chosen to reflect the fact that mortgage lenders will typically lend a maximum of four times a person's earnings and so if there are insufficient properties at this price point in an area then more homes need to be planned for.[25]

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

Figure 3.1: Local Housing Need market signals uplift calculation

$$\textbf{Adjustment factor} = \frac{\textbf{Local Affordability Ratio - 4}}{\textbf{4}} \times \textbf{0.25}$$

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

Figure 3.2: Local Housing Need calculation

Local Housing Need = (1 + Adjustment factor) × projected household growth

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

[25] Government references the Council Mortgage Lenders, which found the average first time buyer loan to income ratio in England was 3.61 in 2015.

Table 3.2: Median workplace affordability ratios, adjustment factors and total Local Housing Need figures for Greater Manchester

Area	Median workplace affordability ratio (2017)	Adjustment factor (based on affordability ratio)	Adjustment factor plus 1	Total Local Housing Need (Adjustment factor plus 1 x annual projected household growth)
Bolton	5.23	0.08	1.08	791
Bury	6.51	0.16	1.16	608
Manchester	5.35	0.08	1.08	2,584
Oldham	5.55	0.10	1.10	716
Rochdale	5.62	0.10	1.10	514
Salford	5.63	0.10	1.10	1,372
Stockport	7.56	0.22	1.22	1,087
Tameside	5.54	0.10	1.10	632
Trafford	8.94	0.31	1.31	1,335
Wigan	5.34	0.08	1.08	944
Greater Manchester				10,583

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 and Wales, 1997 to 2017*

3.20 The effect across Greater Manchester of the application of step 2 is to increase the annual housing need figure by 1,218 (13%) to 10,583. 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

3.21 Government recognises that the change in approach with this methodology will lead to a significant increase in housing need for some local authorities. In order to ensure that the housing need figures are deliverable, a cap is applied to local authorities' housing need figures as follows:

> *a) for those authorities that have adopted their local plan in the last five years, we propose that their new annual LHN figure should be capped at 40 per cent above the annual requirement figure currently set out in their local plan; or*
>
> *b) for those authorities that do not have an up-to-date local plan (i.e. adopted over five years ago), we propose that the new annual LHN figure should be capped at 40 per cent above whichever is higher of*

the projected household growth for their area over the plan period (using ONS's household projections), or the annual housing requirement figure currently set out in their local plan.[26]

3.22 Under this criteria, none of the LHN figures for the Greater Manchester districts require capping. The overall figure for Greater Manchester in Table 3.2 above is therefore proposed as representing the objectively assessed housing need for Greater Manchester.

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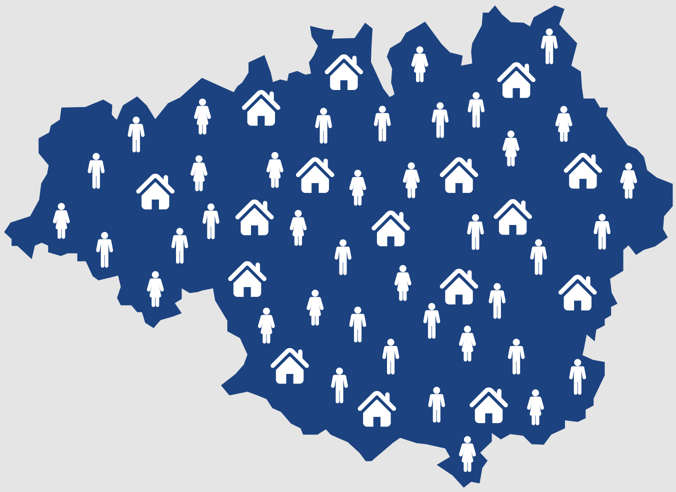
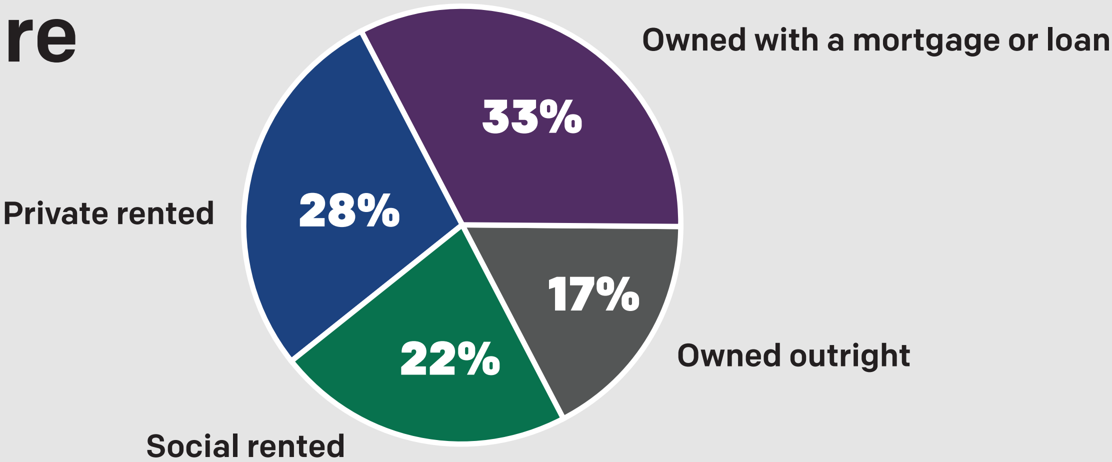
[26] MHCLG, *Planning for the right homes in the right places: consultation proposals,* September 2017, p.12.

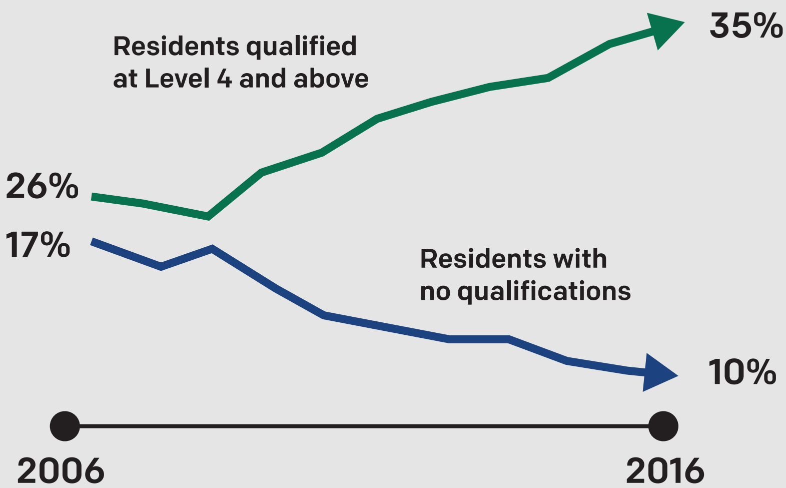
4 | Characteristics of the Housing Market Area

Greater Manchester is home to **2.8m** residents and **1.2m** households



Tenure





Chapter summary

What is Greater Manchester like as a housing market area? With 2.8 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. But it is possible to pick out some of the more important factors and trends.

- Greater Manchester has a relatively youthful population, with over 20% of residents under 30, but at the same time the numbers in the older age groups are growing fast too.
- We are slightly more ethnically diverse than England and Wales as a whole and more of us (almost 400,000) live alone than in any other type of household.
- 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 still high levels of multiple deprivation, and homelessness and rough sleeping have risen in recent years.
- 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.
- Around 1 in 20 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 housing to cater to our residents and make sure we are attractive to potential new residents over the next 20 years.

All of these factors do vary hugely 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.

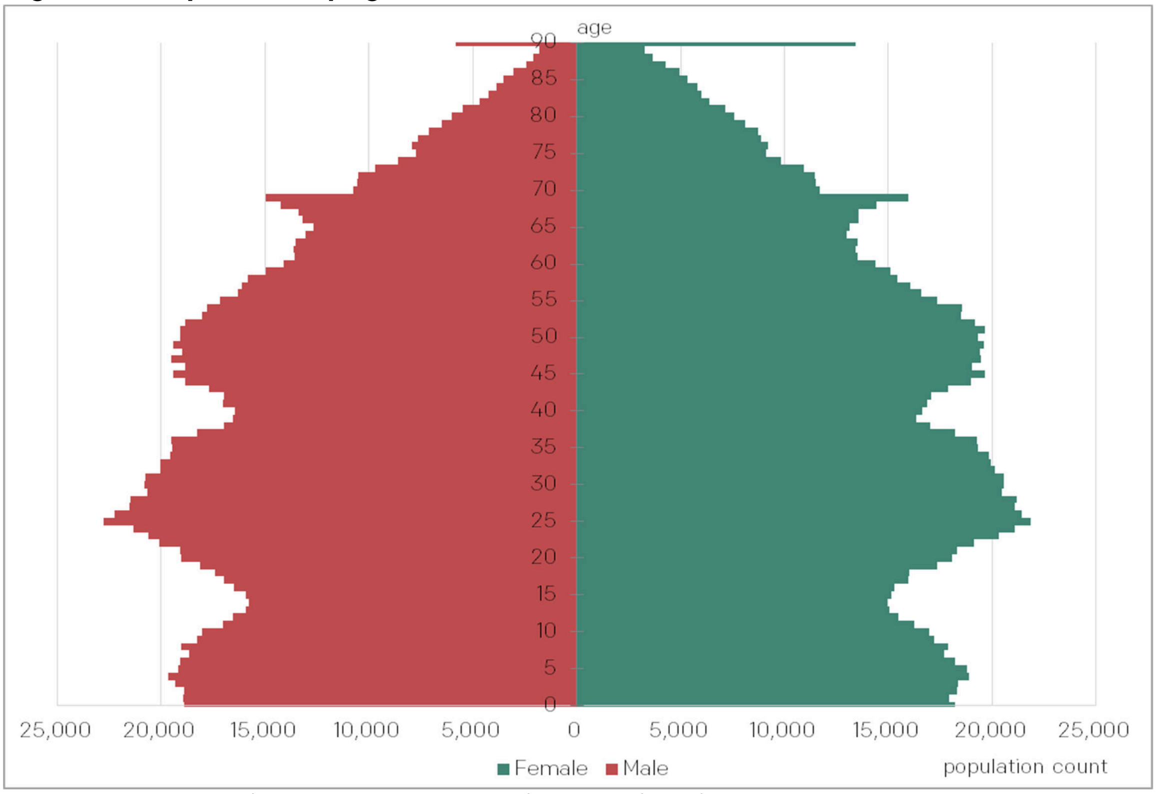
4.2 Data is analysed at a district and Greater Manchester level and where appropriate includes national and regional comparators. The purpose of this chapter is to strengthen understanding of the economic and demographic dynamics of the conurbation to help inform future housing needs.

4.2 Population and household profile

Population and age structure

4.3 Greater Manchester has a total population of 2.8 million people, making it the second largest of the former metropolitan county areas after the West Midlands.[27]

Figure 4.1: Population by age for Greater Manchester, 2016



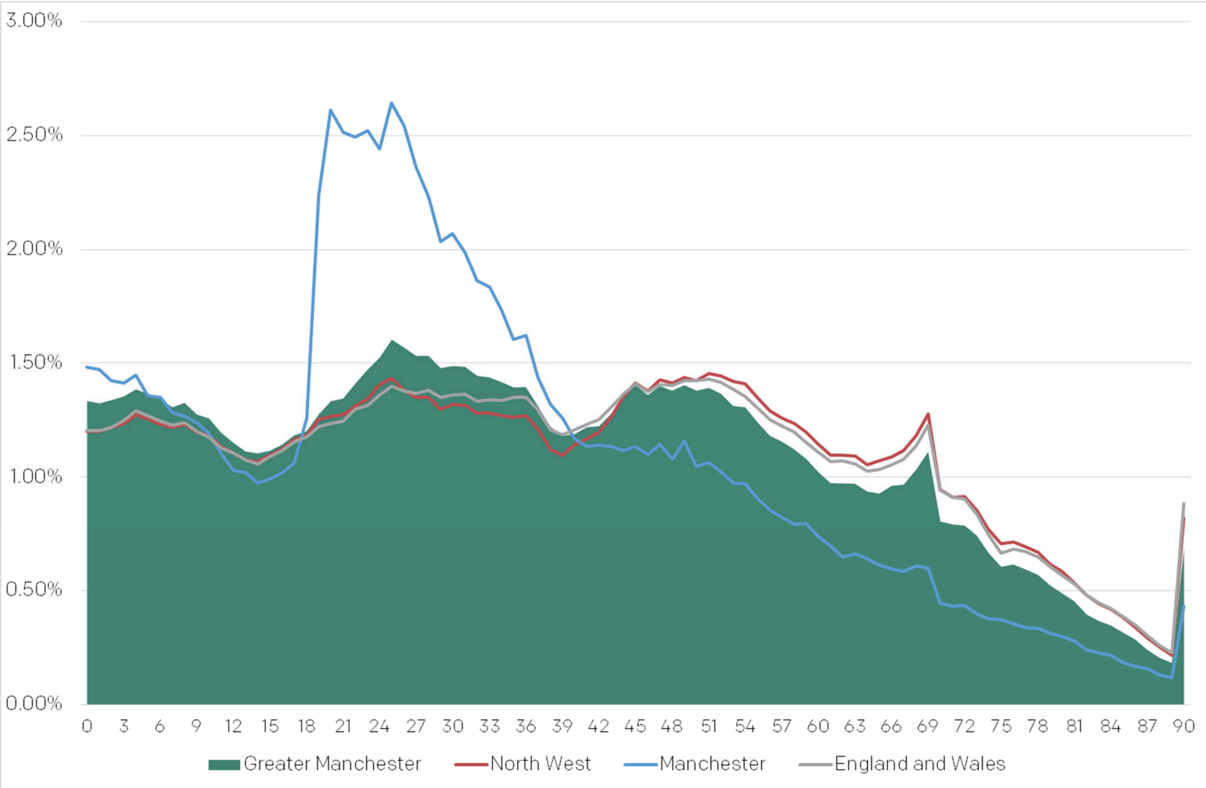
Source: ONS Population Estimates Analysis Tool, Mid-2016

[27] ONS, Population Estimates by Local Authority and single year of age, 2016

4.4 Figure 4.1 shows that those aged between 19 and 35 make up the largest section of the population in Greater Manchester. There are also large numbers of 40-55 year olds and spikes in the population of those in their late 60s and women aged over 90 (although it is worth noting that all people aged over 90 are grouped in this chart).

4.5 The Greater Manchester picture masks variation between districts, with Manchester in particular having a very high proportion of 19-26 year olds.

Figure 4.2: Population age profile, 2016



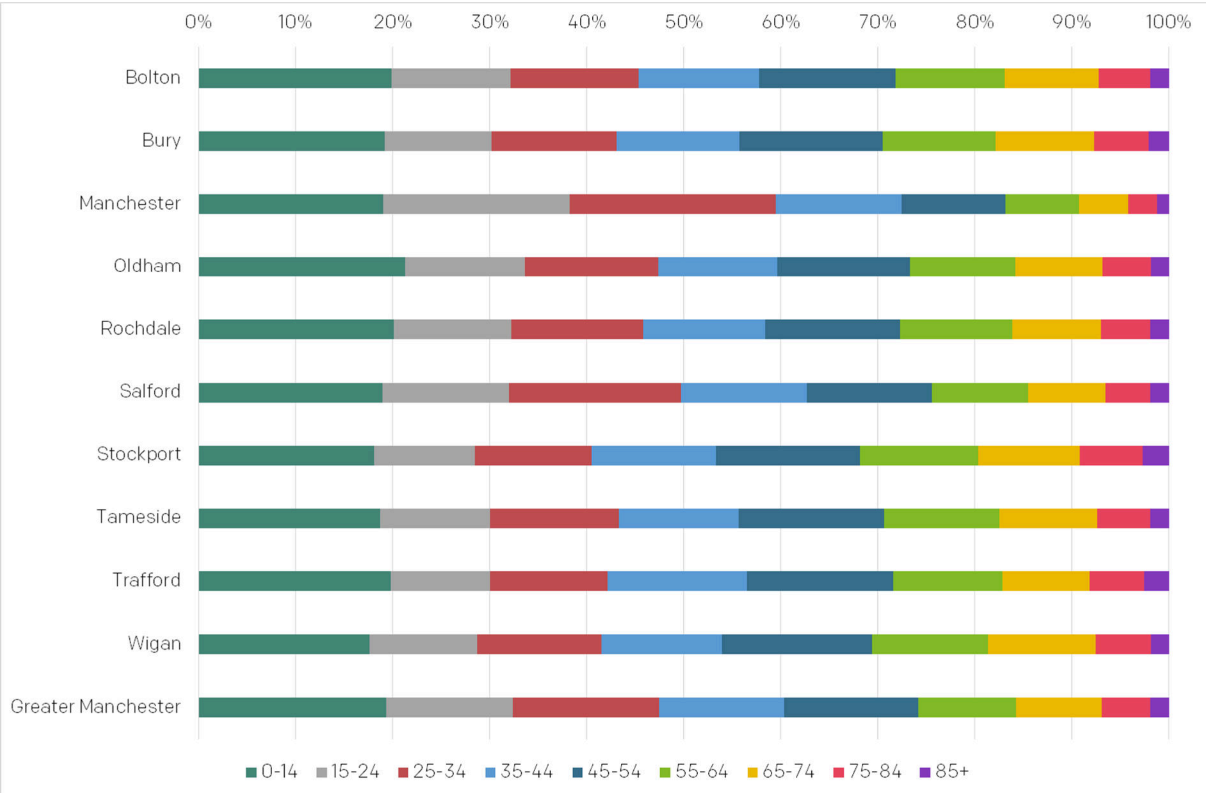
Source: ONS Population Estimates Analysis Tool, Mid-2016

4.6 Figure 4.2 shows the variation between Greater Manchester and the regional and national averages. It illustrates that Manchester has a markedly different population profile from that of the other nine Greater Manchester districts, and that the population of Manchester contributes to setting Greater Manchester apart from regional and national averages.

4.7 Broadly speaking, Greater Manchester has a younger population profile than the North West and England and Wales, with larger proportions of the population aged under 40. Those aged between 40 and 50 are largely in line with the regional and national average proportions and those over 50 make up a smaller proportion of the population than that of the North West and England and Wales.

4.8 Manchester has a younger age profile, with above average proportions of children aged under 5 and a significantly above average proportion of 19-30 year olds; this is likely to be a result of the large student and young professional population in the district, as well as higher levels of international migration of younger households.

Figure 4.3: Population by age band in Greater Manchester districts, 2016



Source: ONS Population Estimates Analysis Tool, Mid-2016

4.9 Figure 4.3 illustrates the variations between Greater Manchester districts in terms of age. There are patterns among districts, although as explained previously, Manchester differs quite substantially and shows a significantly larger young adult population.

4.10 In all other districts and in Greater Manchester as a whole, children aged under 15 make up the largest proportion of the population; in Oldham children make up over a fifth of the population. It should be noted however, that this age band is broader than most of the others shown.

4.11 Those aged 15-24 and 25-34 account for 28% of Greater Manchester's population, with higher concentrations of these age bands found in Manchester and Salford. Those aged 35-44 account for 13% of the population, as do those aged 45-54. The population in the 55-64 year old age band accounts for 10% of the Greater Manchester population. At a Greater Manchester level, 16% of the population is aged over 65, but with a significant variation at the district level: with 9% of Manchester residents and 20% of Stockport residents in this age band.

Figure 4.4: Changes to the age structure of Greater Manchester, 1997-2016

Source: ONS Mid-year Population Estimates

4.12 Over the last 20 years the age structure in Greater Manchester has broadly been characterised by an increase in children under the age of 15 and growth in numbers of people aged over 45, with a more mixed picture for those in early adulthood. The changes are as follows:

- The number of children under 15 fell by 7% between 1997 and 2006. However, this cohort subsequently increased by over 10% in the decade between 2007 and 2016, to almost 534,000;
- The population of young adults aged 15-24 increased by 17% over the period 1997-2006, but then declined by 4% between 2007 and 2016;

- Subsequently the 25-34 year old cohort, after a sharp decline of over 10% during the period 1997-2006, increased by over 15% between 2007 and 2016, to 417,000;
- After strong growth between 1997 and 2006, the 35-44 year old cohort experienced a decline over the period 2007-2016, reflecting the earlier decline in 25-34 year olds;
- A small decline in the 45-54 cohort between 1997 and 2006 was followed by growth of over 17% in the decade to 2016. The 55-64 age cohort experienced stronger growth over the first decade than the second (16% as opposed to 3%);
- The strongest population growth seen over the period has been in the 65-74 age cohort, reflecting the ageing of the population. After a small decline between 1997 and 2006 this age cohort increased by 23% between 2007 and 2016. The 75-84 year old cohort followed the same pattern, but with far smaller rates of change; and
- The cohort of people aged over 85 saw an increase of 9% over the period 1997-2006 and 15% increase between 2007 and 2016.[28]

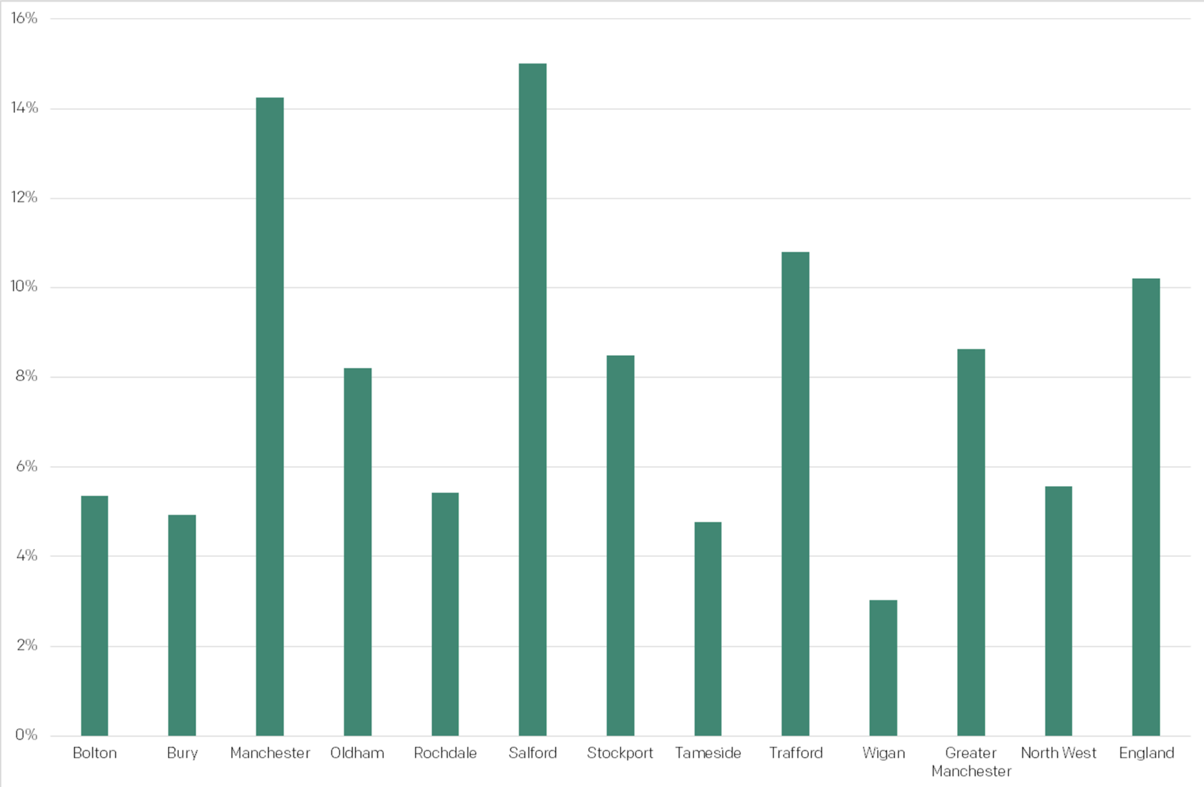
Population projections

Population change

4.13 Figure 4.5 shows the percentage change in population using the 2016-based subnational population projections between the years 2016 and 2036.[29] Salford and Manchester are expected to experience the highest population growth in this period and Wigan and Tameside the least as was the case with the 2014-based projections. The expected change in Greater Manchester is higher than that for the North West as a whole but lower than that nationally.

[28] For further discussion of the growth of the older population in Greater Manchester, see Older persons housing in Chapter 6.
[29] More information on ONS subnational population projections, including the methodology used to produce the projections and information on changes to this methodology is available at: https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationprojections/bulletins/subnationalpopulationprojectionsforengland/2016based.

Figure 4.5: Percentage change in population, 2016 to 2036



Source: ONS 2016-based subnational population projections for local authorities and higher administrative areas in England

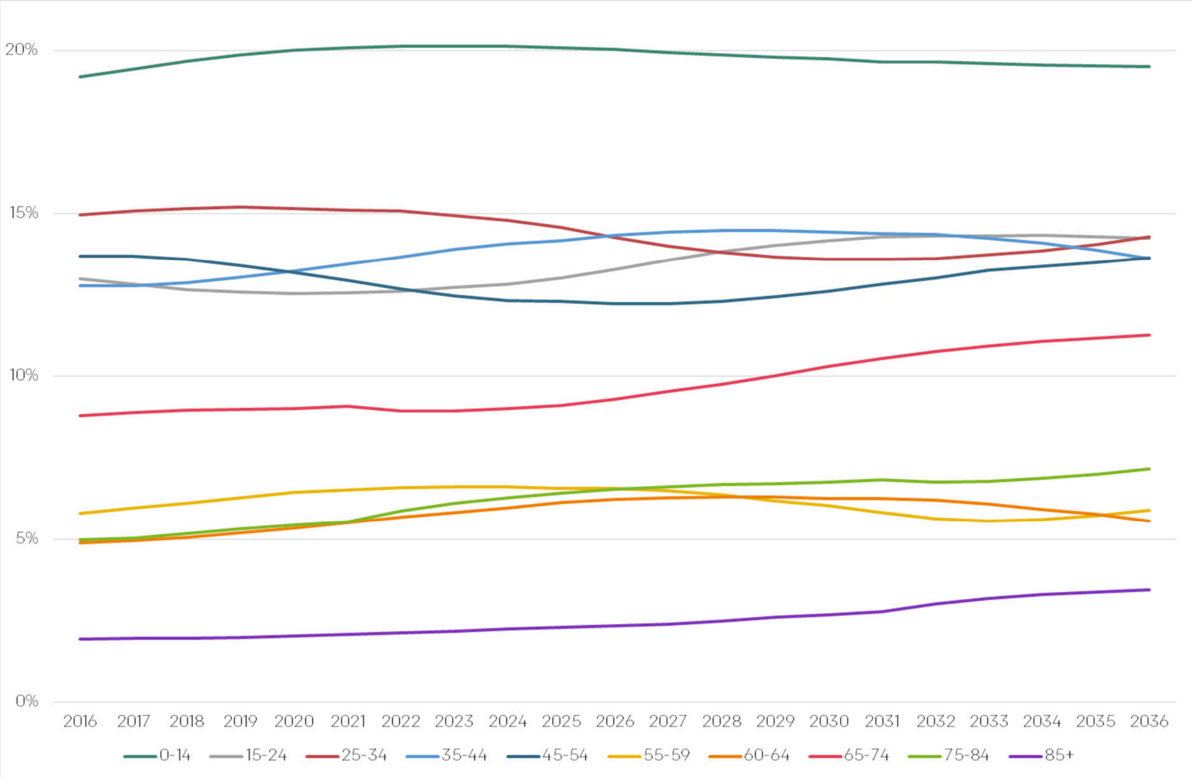
4.14 Figure 4.6 provides the population projections by broad age bands for the Greater Manchester districts between 2016 and 2036. The 2016-based population projections show those aged 14 or under account for the largest proportion of the population, at around 20% over the period. The proportion of the total population who will be children will peak between 2020 and 2026, with a slight decline after 2027.

4.15 Those aged 15-24 accounted for 13% of the population in 2016; by 2036, this is projected to increase to just over 14% of the population. Those aged 25-34 are also projected to account for around 14% of the population in 2036, however this is a decline from 15% in 2016. The proportion of those aged 35-44 is set to increase slightly over the period, from 13% in 2016 to 14% in 2036. Those aged 45-54 will account for around 13% of the population over the period, and those aged 55-59 will account for around 6% of the population throughout the period.

4.16 All other age bands will increase in the years to 2036. Those aged 60-64 are projected to account for 6% of the population by 2036, as opposed to 5% in

2016. 65-74 year olds are projected to account for 11% of the population in 2036, an increase from 9% in 2016. Those aged 75-84 are projected to account for over 7% of the population in 2036, and those aged over 85 are set to account for 3.5%, as opposed to 2% in 2016.

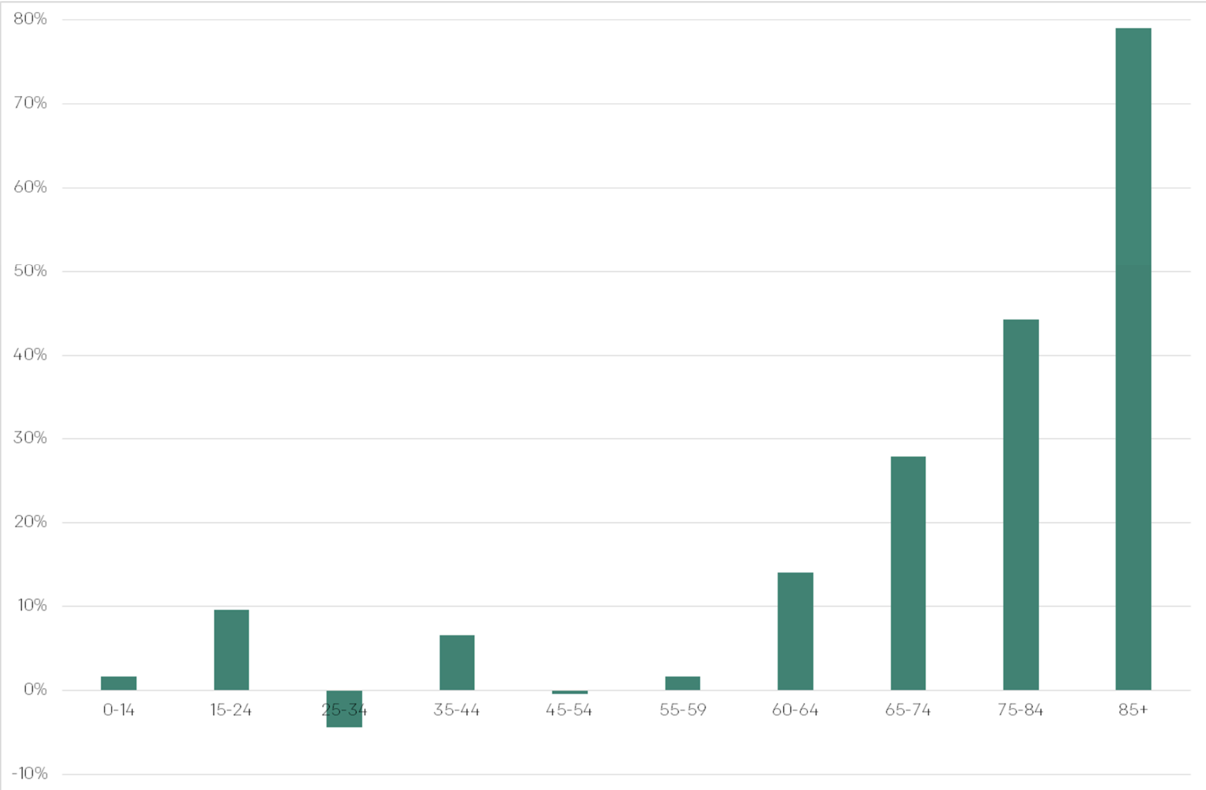
Figure 4.6: Greater Manchester population projections by broad age bands, 2016-2036



Source: ONS 2016-based subnational population projections for local authorities and higher administrative areas in England

4.17 Figure 4.7 below shows that the greatest rate of population change between 2016 and 2036 is projected to be in the older age groups, with those aged over 85 increasing by 79% over the period. There will also be strong growth in all age groups over 60. Those aged 25-34 and 45-54 are both projected to see a slight decline over the period.

Figure 4.7: Percentage population change for Greater Manchester by broad age bands, 2016-2036



Source: ONS 2016-based subnational population projections for local authorities and higher administrative areas in England.

Components of change

4.18 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, 2016-2036

Area	2016-based SNPP		
	Population Change (000s)	Net migration (000s)	Natural change (000s)
Bolton	15.2	-3	18.7
Bury	9.3	1.7	7.4
Manchester	77.2	-19.8	97.7
Oldham	19.1	-1.7	20.4
Rochdale	11.7	-2.4	13.8
Salford	37.3	9	28.2
Stockport	24.6	13.4	11
Tameside	10.7	2.4	8.1
Trafford	25.3	12.4	13
Wigan	9.8	11.6	-1.6
Greater Manchester	240.2	23.5	216.4
North West	403	215	187.4
England	5,637	3,100	2,540

Source: ONS 2016-based subnational population projections for local authorities and higher administrative areas in England

Natural change

4.19 For Greater Manchester natural change is far more important to overall population growth than migration, accounting for 90% of the population increase, or 216,400 people. This is in contrast to England as a whole and the North West where net migration is of greater importance than natural change, accounting for just over 50% of population change over the period.

4.20 Births in the twenty years are projected to be 719,800 for Greater Manchester, whereas 503,300 deaths are projected for the period 2016-2036.

Net migration

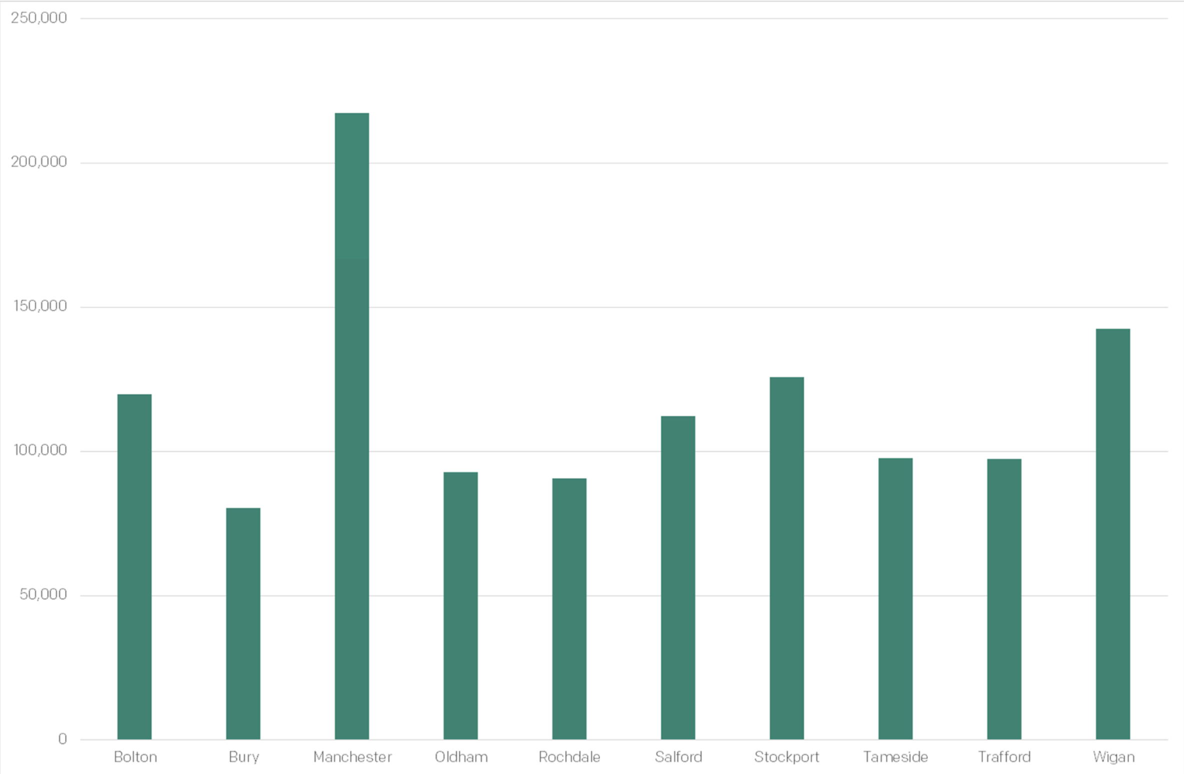
4.21 Over the period, Manchester loses population due to migration (around 20,000 people over the period), however many of those will be moving to other parts of Greater Manchester or the North West. Greater Manchester gains around 23,500 people through migration over the period.

Household characteristics

Number of households

4.22 In 2018 there were 1.2 million households in Greater Manchester, the district breakdown of which is shown below.

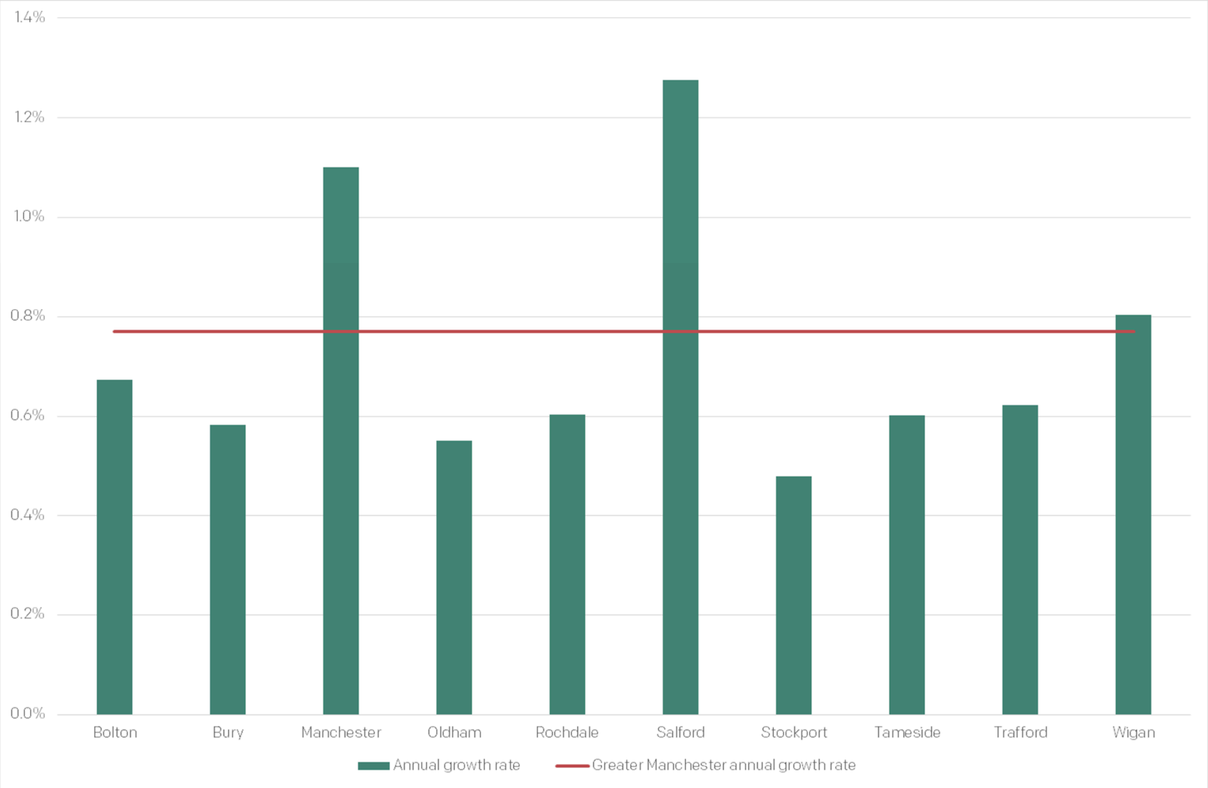
Figure 4.8: Number of households in Greater Manchester districts, 2018



Source: ONS Household Projections (2016-based)

4.23 Figure 4.9 below shows the change in households by district in Greater Manchester. Overall there was an increase of around 87,000 households in Greater Manchester over the period 2008-2018.

Figure 4.9: Average annual growth rate in the number of households in Greater Manchester districts, 2008-2018

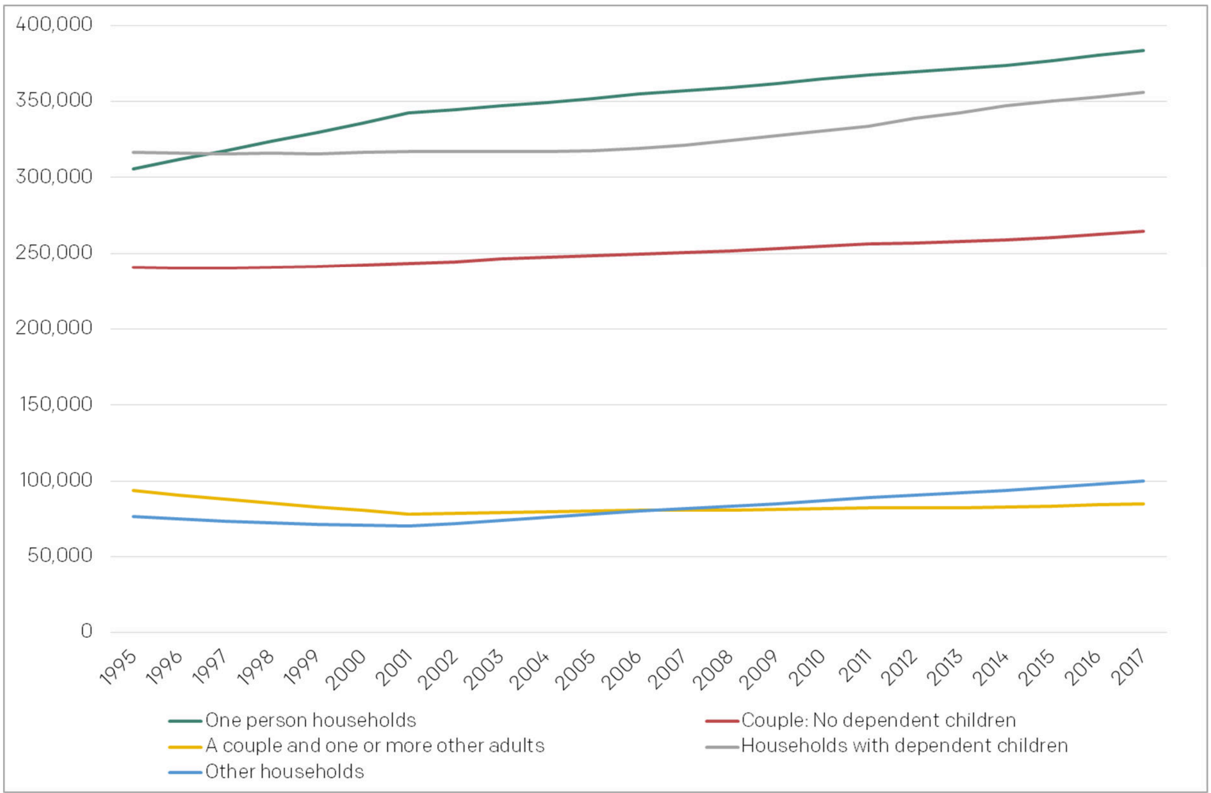


Source: ONS Household Projections (2016-based)

4.24 The highest rates of growth over the latter decade have been in Salford and Manchester, at around 1.3% and 1.1% per annum respectively, with Manchester experiencing strong population growth since around the year 2000 and Salford since around 2005. Wigan and Bolton also experienced high rates of household growth, with Wigan having the second largest number of households in Greater Manchester.

4.25 The lowest proportionate increases have been in the east and north of Greater Manchester, with annual growth rates over the period 2007-2017 of 0.5% in Stockport and 0.6% in Oldham, Rochdale, Tameside, Trafford and Bury.

Figure 4.10: Change in households by household composition in Greater Manchester, 1995-2017*



Source: MHCLG Household Projections model (2014-based)

**Please note the 2016-based household projections by household type were not available at the time of analysis.*

4.26 Figure 4.10 shows the change in numbers of households in Greater Manchester by household type, between 1995 and 2017. This shows that in 1995 households with dependent children made up the majority of households in Greater Manchester, but by 1997 these had been surpassed by one-person households which have been the most common household type since then. However, the gap between the two groups has narrowed in the years after 2012, with households with dependent children increasing to 356,000 in 2017.

4.27 Couple households have increased slightly over the 20 year period, from 241,000 to 265,000 households in 2017. Couples living with another adult have made up the smallest number of households in Greater Manchester since 2006, with 85,000 of these households in 2017.

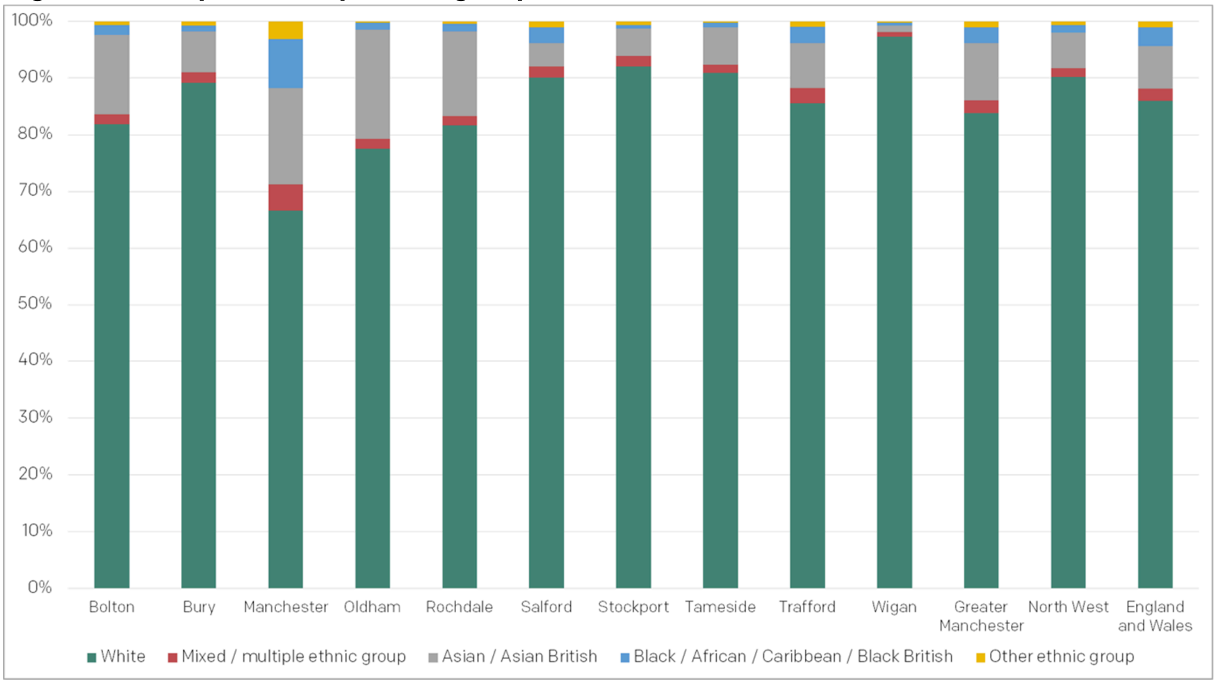
4.29 The number of households classified as 'Other' (including households without dependent children including unrelated adults living together in a house share, adult siblings living together, lone parents and non-dependent children) has been increasing steadily since the mid-2000s, with over 100,000 other households living in Greater Manchester in 2017.

District level data can be found in [8.1 Characteristics of the Housing Market Area appendices]. Please note that at the time of analysis, the 2016-based household projections by household type were not available and so the appendices contain 2014-based data.

Black and Minority Ethnic (BME) communities

4.30 Greater Manchester is a little more ethnically diverse than England and 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.

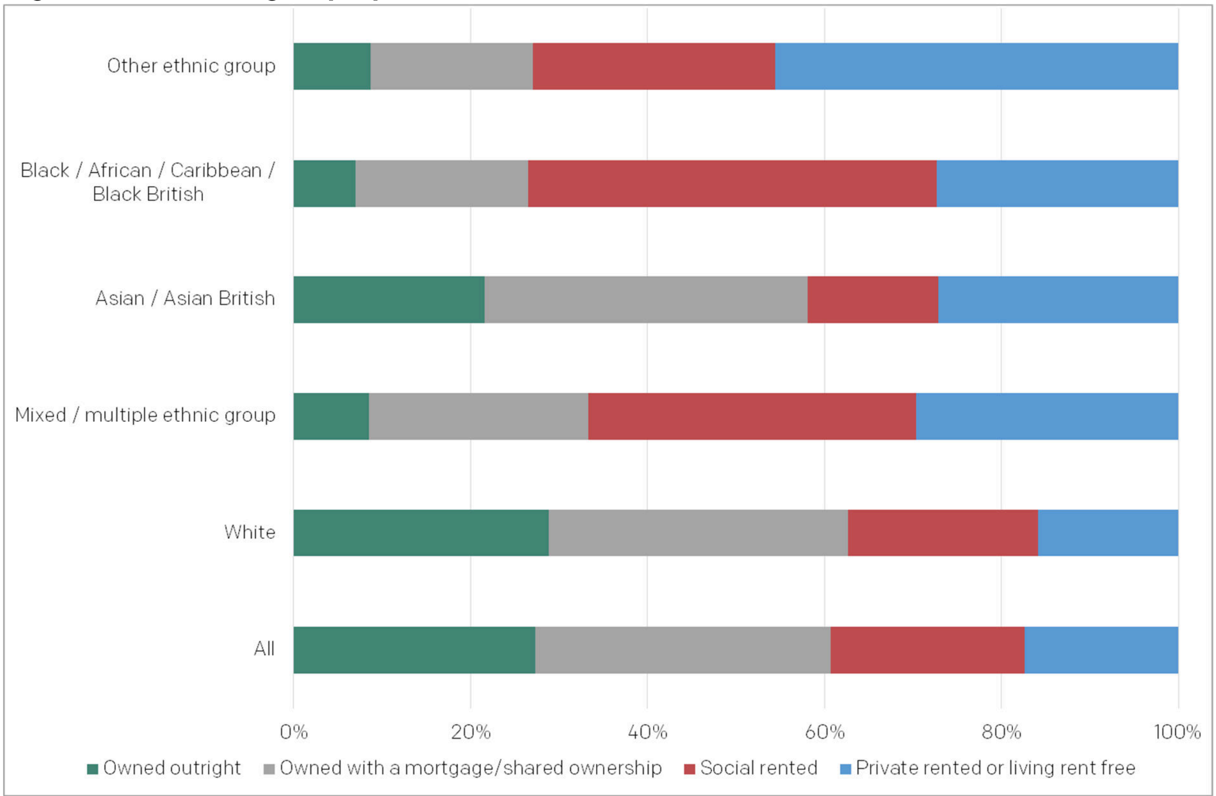
Figure 4.11: Population by ethnic group in Greater Manchester districts, 2011



Source: Census 2011

4.31 Figure 4.11 shows the breakdown of districts by ethnic group. In Greater Manchester 84% of residents identify as white as opposed to 86% in England and 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 another ethnic group.

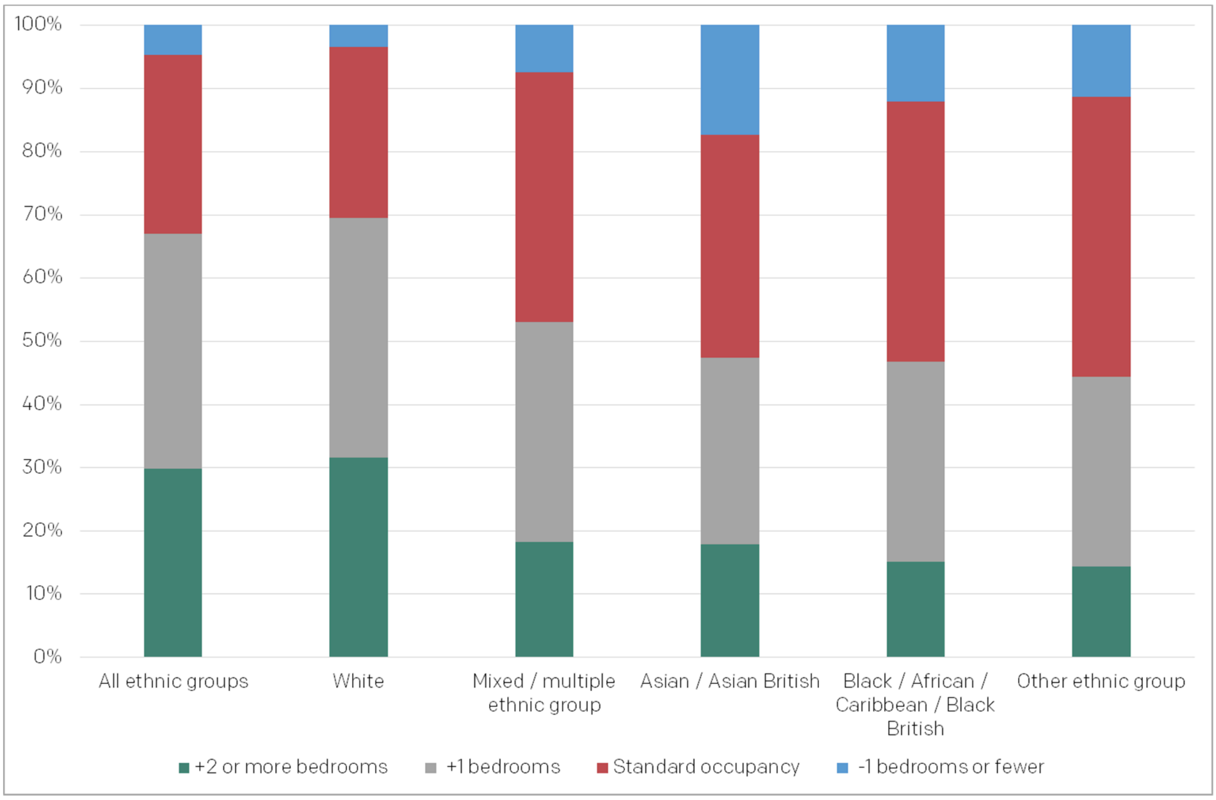
Figure 4.12: Ethnic group by household tenure in Greater Manchester, 2011



Source: Census 2011

4.32 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. The majority of 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: Census 2011

4.33 Figure 4.13 shows the occupancy rating of homes by the ethnic group of the household representative. Across the Greater Manchester population as a whole, around 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.

4.34 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.

4.35 Around 53% of households comprising mixed or multiple ethnic groups are under-occupying, with 40% of homes occupied to standard and 7.5%

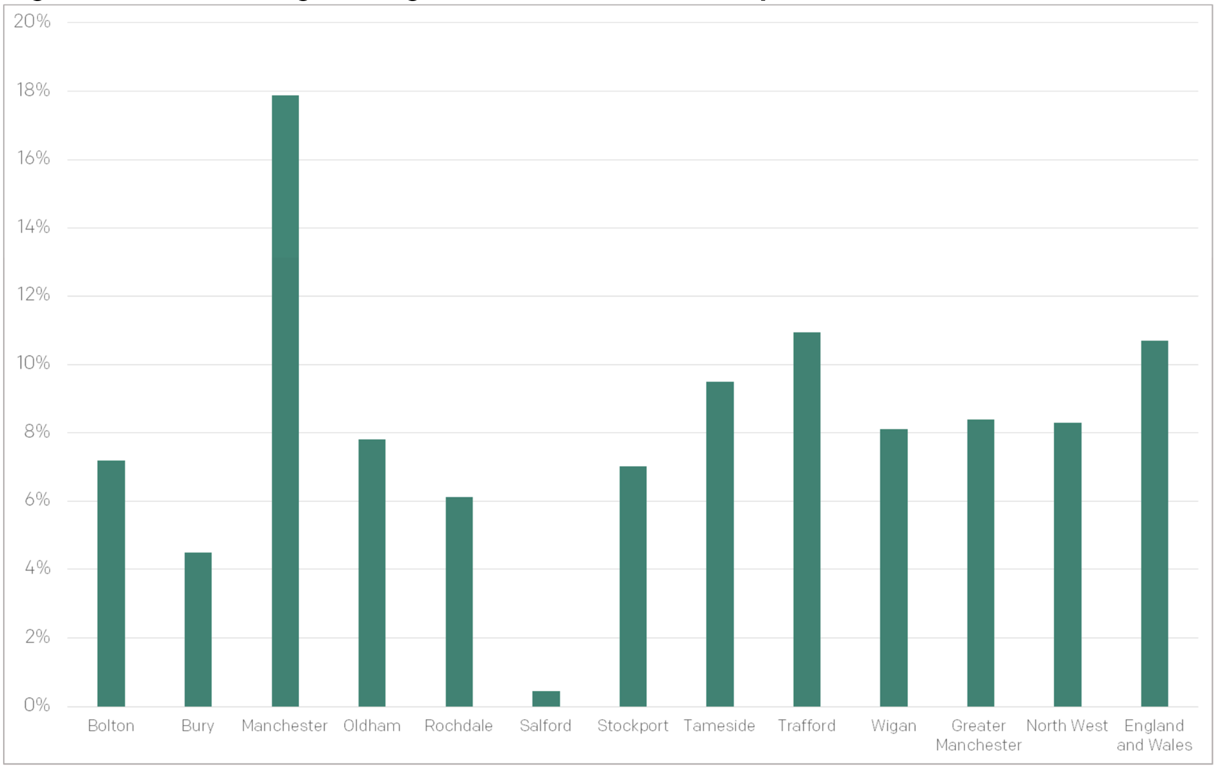
overcrowded, which is above the Greater Manchester average. Those who are Asian or Asian British are also more likely to have at least one bedroom fewer than needed, with 17% of households overcrowded. Black African, Caribbean and British households, as well as those from another ethnic group, are also more likely to be overcrowded (12% and 11% respectively), but over 40% of both groups are occupied to the expected standard.

Young people

4.36 As already noted, Greater Manchester has a relatively young population, with over 20% of people aged under 30; this compares to 18% in the North West and nationally. The cities of Manchester and Salford have younger than average populations, with a third of Manchester residents aged under 30.[30]

4.37 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.

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



Source: Census 2001 and 2011

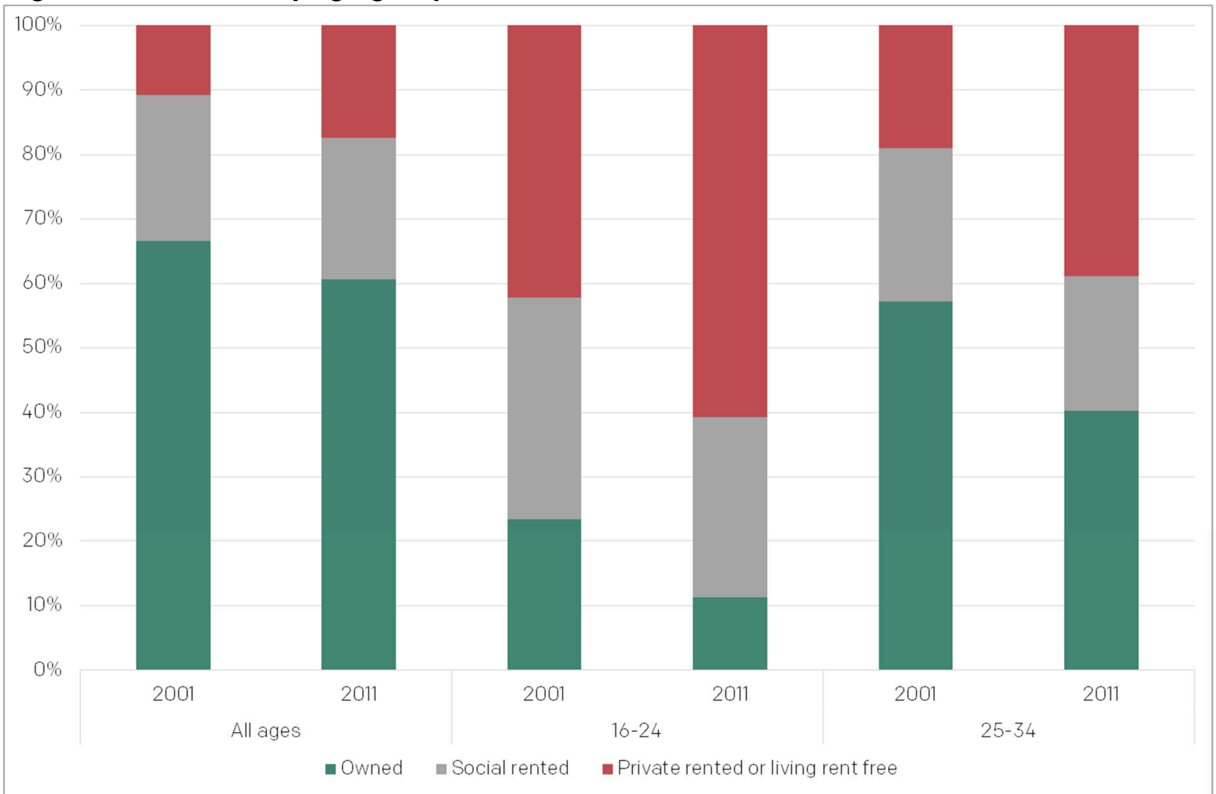
[30] Census 2011

4.38 Figure 4.14 shows that there has been an increase of 11% in families with non-dependent children in England and 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

4.39 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 in order to buy a home. Between 2001 and 2011 the concentration of young people in the PRS in Greater Manchester increased significantly, as a result 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: Census 2001 and 2011

4.40 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%.

4.41 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%.

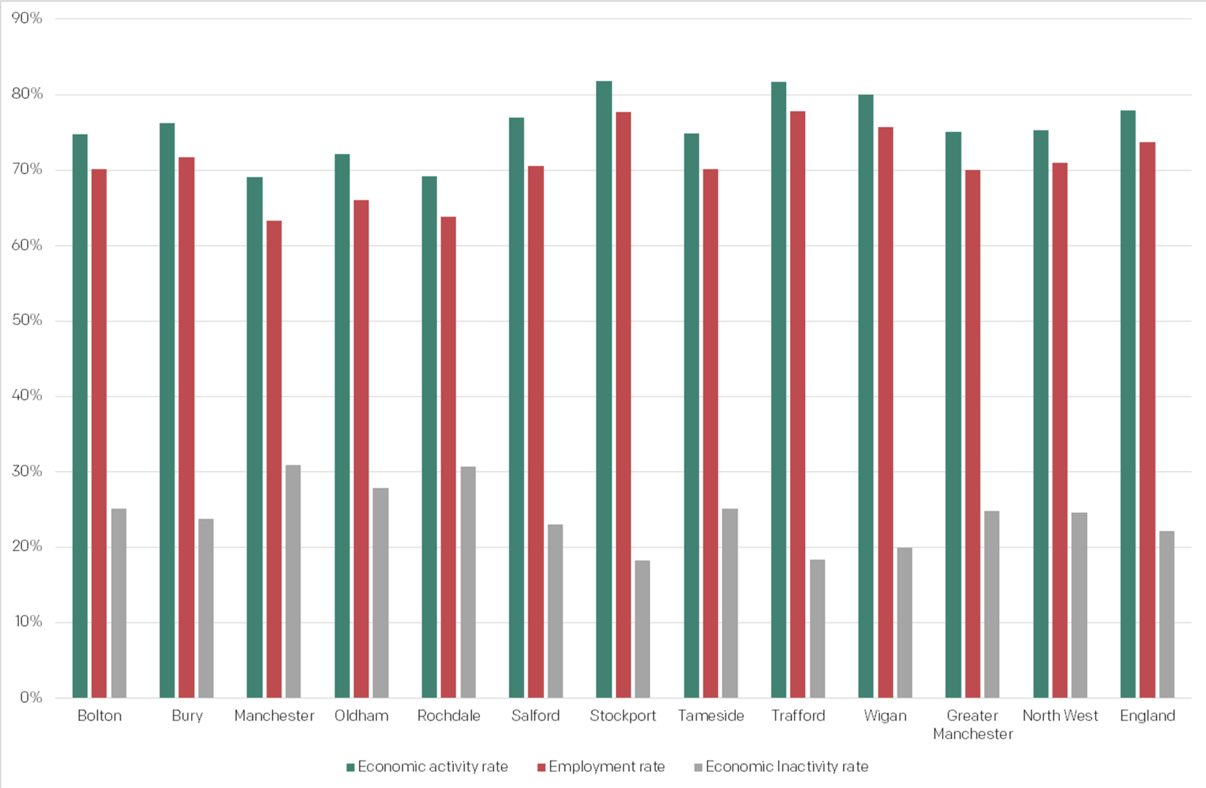
4.3 Socio-economic profile

Economic activity and employment rate

4.42 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.

4.43 Economic activity and employment rates in Greater Manchester are broadly 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 2014- September 2017



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

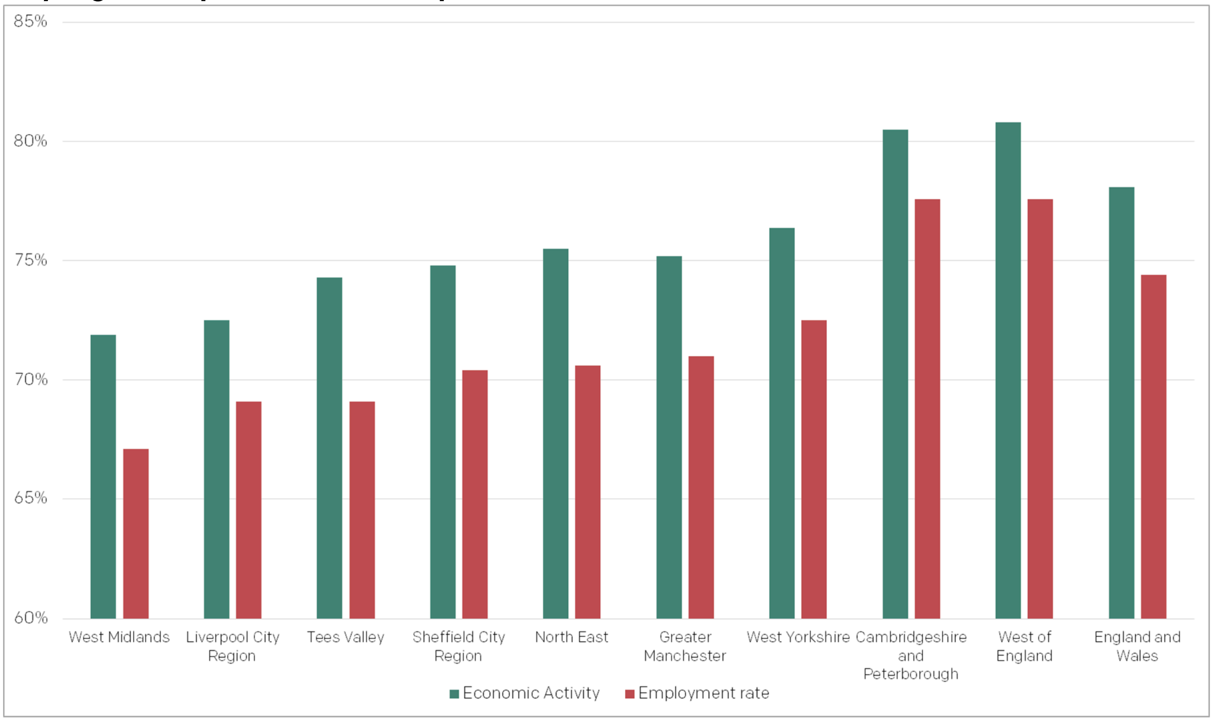
4.44 There are variations between Greater Manchester districts in terms of resident economic activity and employment rates. Rochdale has the lowest rates of employment (64%) and economic activity (69%) in the conurbation. Manchester also has a lower level of economic activity at 70% and an employment rate of 65%; this is likely to be influenced by the large student population in the district, the majority of whom are considered economically inactive. Trafford, Stockport and Wigan all have economic activity and employment rates that are above the national average.

Figure 4.17: Change in economic activity for those aged 16-64, 2006/07-2016/17

Source: Annual Population Survey

4.45 Figure 4.17 shows that Greater Manchester has experienced fairly consistent levels of economic activity between 2006/07 to 2016/17. Greater Manchester has been consistently similar to the North West level of economic activity over the period, but lagged slightly behind in 2016. Both the North West and Greater Manchester have been a few percentage points below the national average in terms of economic activity.

Figure 4.18: Average economic activity and employment rate of those aged 16-64 by city region, September 2014-September2017



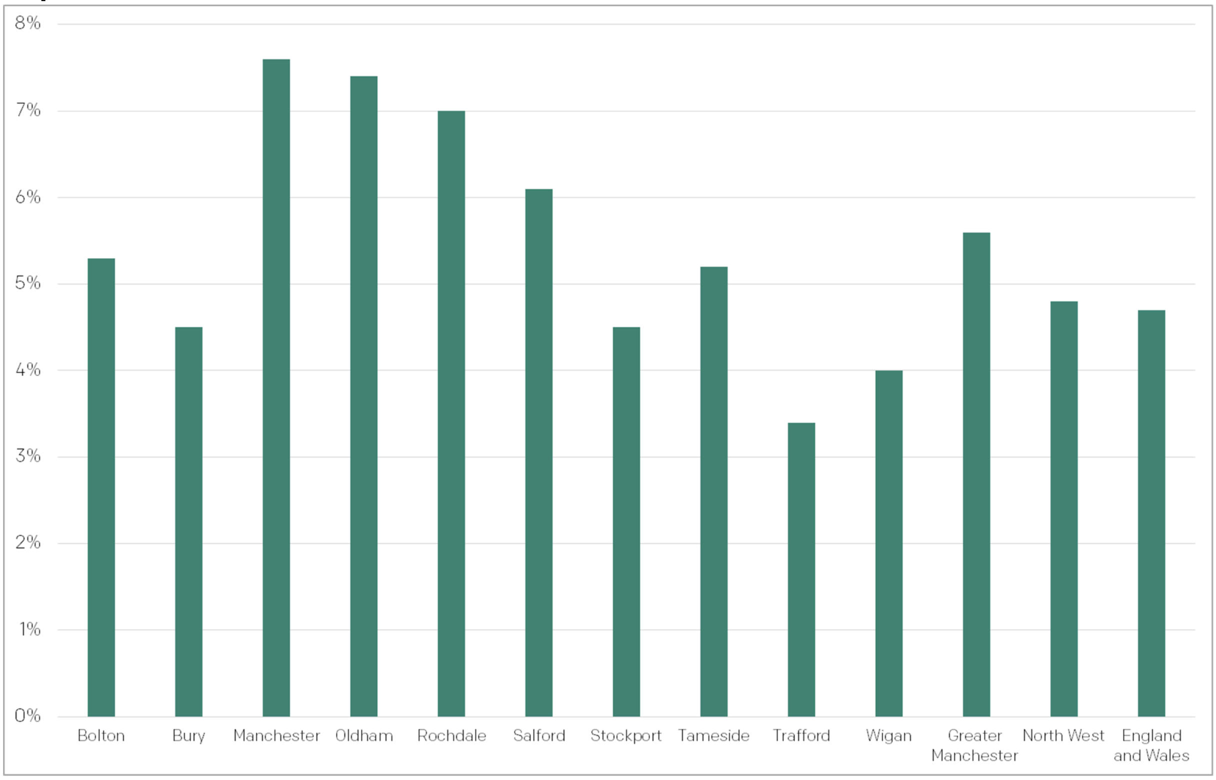
Source: Annual Population Survey

4.46 Figure 4.18 shows the performance of Greater Manchester relative to the other Combined Authority areas in terms of employment and economic activity rates. This shows that Greater Manchester performs well in relation to the other northern Combined Authority areas, with higher employment rates than all except West Yorkshire and higher economic activity rates than all except the North East and West Yorkshire Combined Authorities.

Worklessness

4.47 The unemployment rate reported by the ONS in the UK uses the International Labour Organisation 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 2016/17, 5.6% of people aged 16-64 in Greater Manchester were unemployed.

Figure 4.19: Average unemployment rate of those aged 16-64, September 2014-September 2017



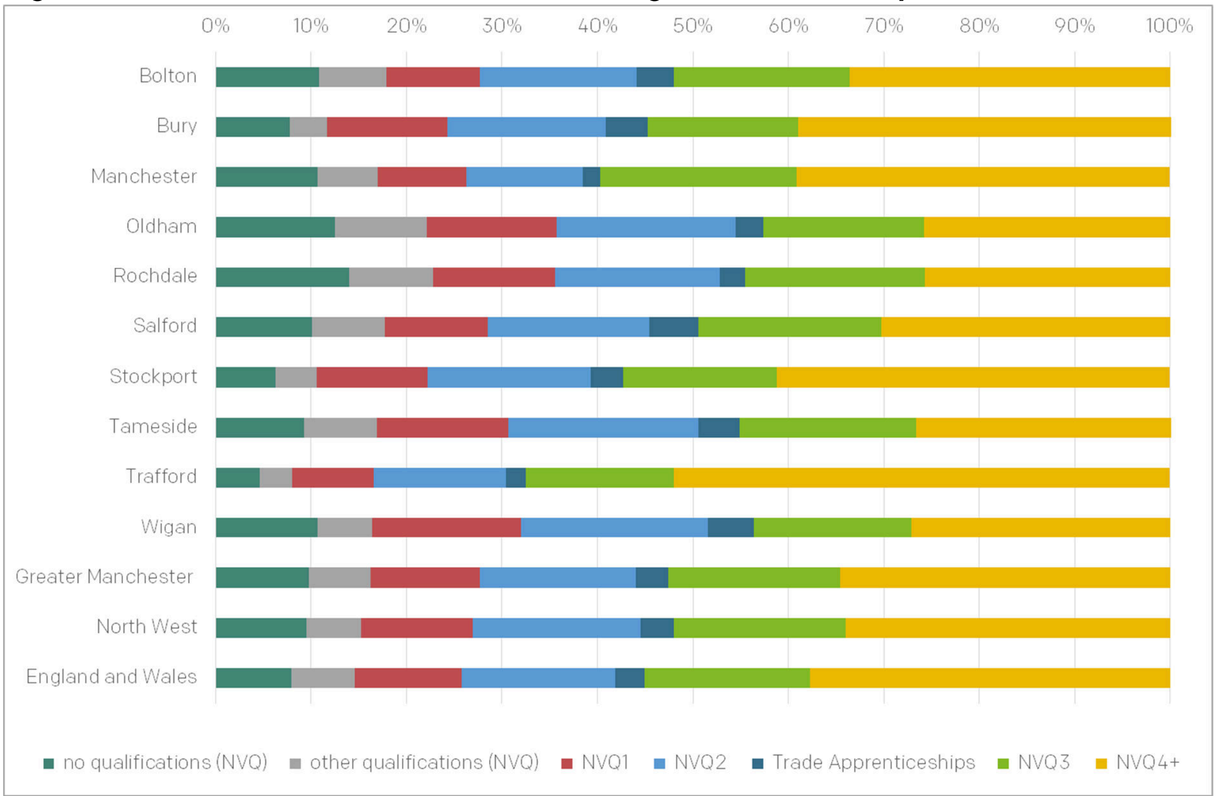
Source: Annual Population Survey

4.48 Figure 4.19 shows that unemployment is highest in Manchester at 7.6% of the working age population, with Oldham and Rochdale also having rates of 7% or above. Trafford and Wigan have particularly low rates of 4% or below, with Bury and Stockport also lower than the national and regional averages.

Qualifications

4.49 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. However there is also a slightly larger proportion of the population qualified to NVQ level 4 or above (equivalent to an undergraduate degree) in Greater Manchester than in the North West as a whole; though this is still below the national average for level 4 and above qualifications.

Figure 4.20: Qualification levels for residents aged 16-64, January-December 2016



Source: Annual Population Survey

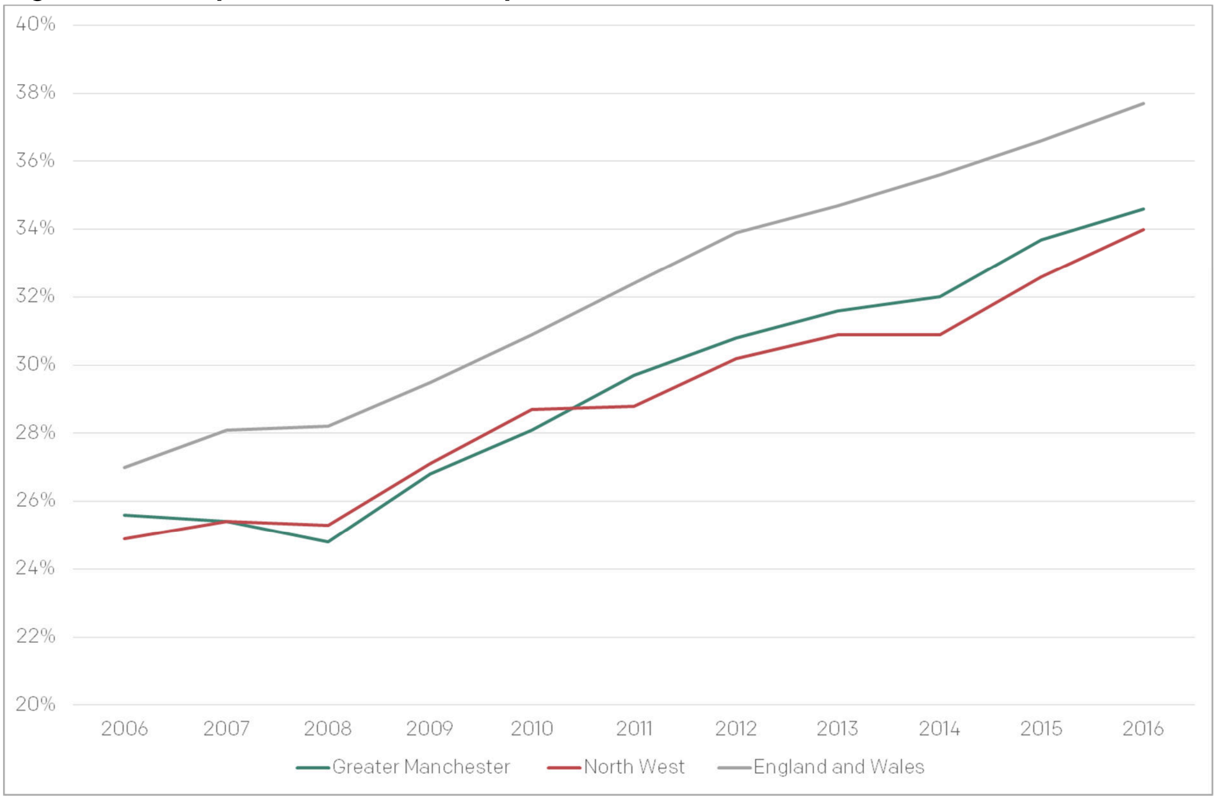
4.50 Figure 4.20 shows that over half of Greater Manchester's population is qualified to NVQ level 3 or above, which is equivalent to A-Level or higher. This is slightly higher than the North West, but lower than the national average for these qualification levels.

4.51 There is some variation within districts, with almost 70% of Trafford residents having level 3 or above qualifications and over 50% with level 4 and above. Over 40% of Stockport residents and nearly 40% of Bury and Manchester residents are also qualified to level 4 or above. Notably, Manchester also has an above national average proportion of residents with no qualifications.

4.52 Rochdale and Oldham have a similar qualifications profile, with above average levels of residents with no qualifications and below average level 4 and above attainment; Rochdale has almost twice the national average level of residents with no qualifications.

4.53 Residents with trade apprenticeships account for 3.4% of the population; this is in line with the North West average and slightly above the national average. It should be noted that those with apprenticeships may be included in one of the other categories, depending on the level of their apprenticeship.

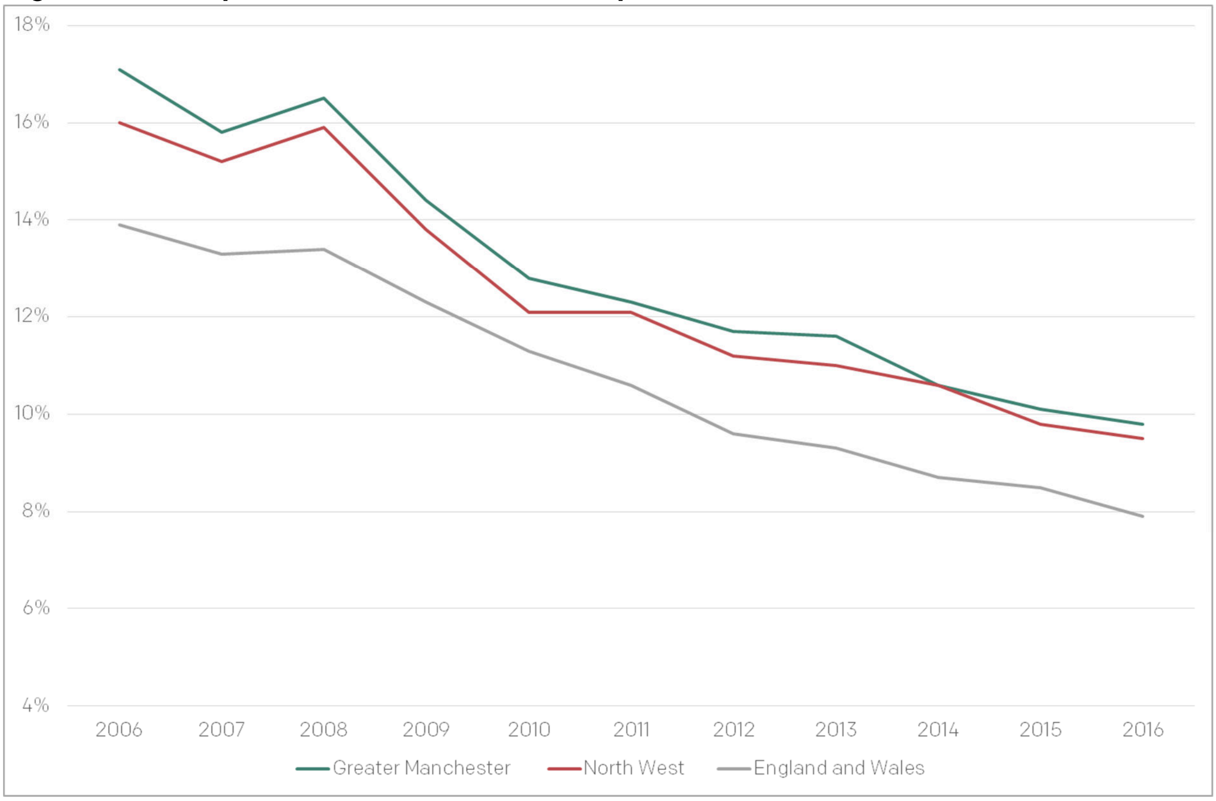
Figure 4.21: Proportion of residents qualified at level 4 or above, 2006-2016



Source: Annual Population Survey

4.54 Figure 4.21 shows the change in level 4 and above qualifications over the period 2006 to 2016. The chart shows that the proportion of the population qualified to this level has increased by around ten percentage points over the period, with growth outstripping that of the North West after 2010. Greater Manchester still lags someway behind the national average for level 4 and above qualifications.

Figure 4.22: Proportion of residents with no qualifications, 2006-2016



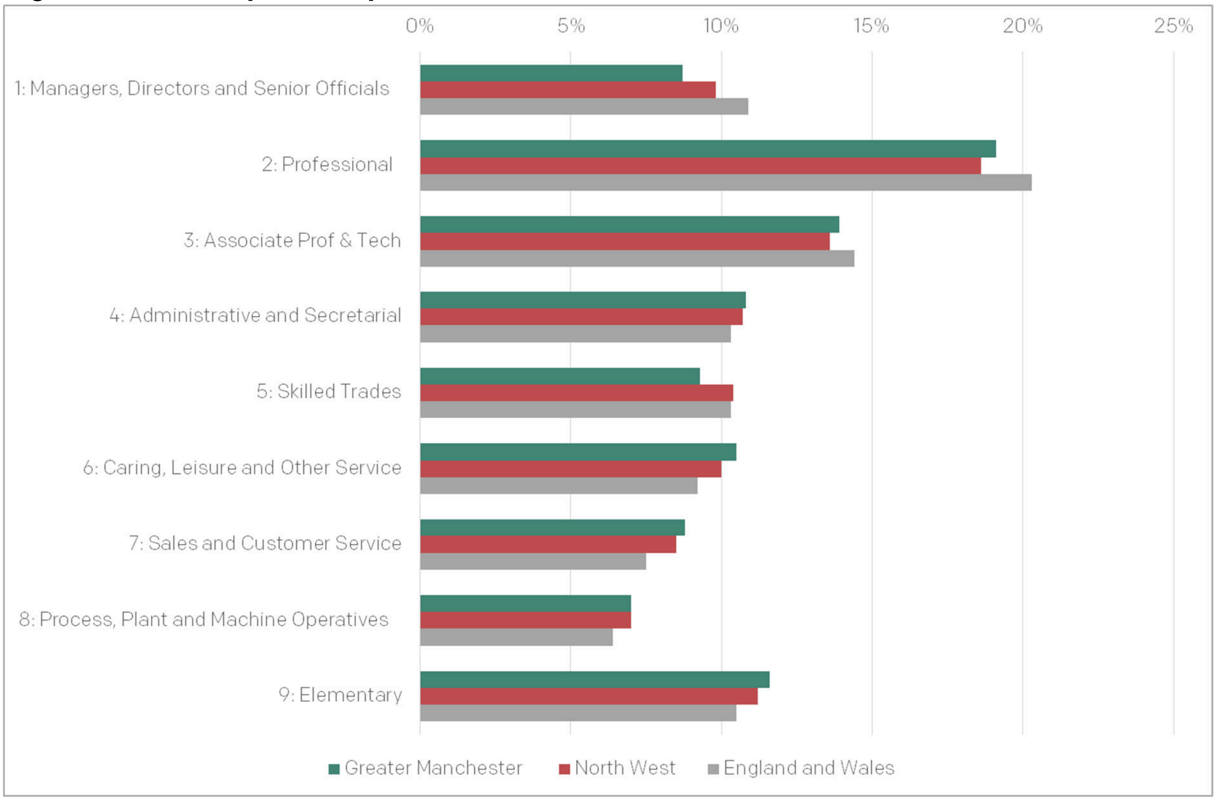
Source: Annual Population Survey

4.55 Conversely, Figure 4.22 shows that Greater Manchester has seen a steady decline in those who have no qualifications over the last decade, from 17% of residents in 2006 to 10% in 2016. The proportion of Greater Manchester residents with no qualifications however remains slightly higher than the North West and national averages.

Occupation

4.56 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).

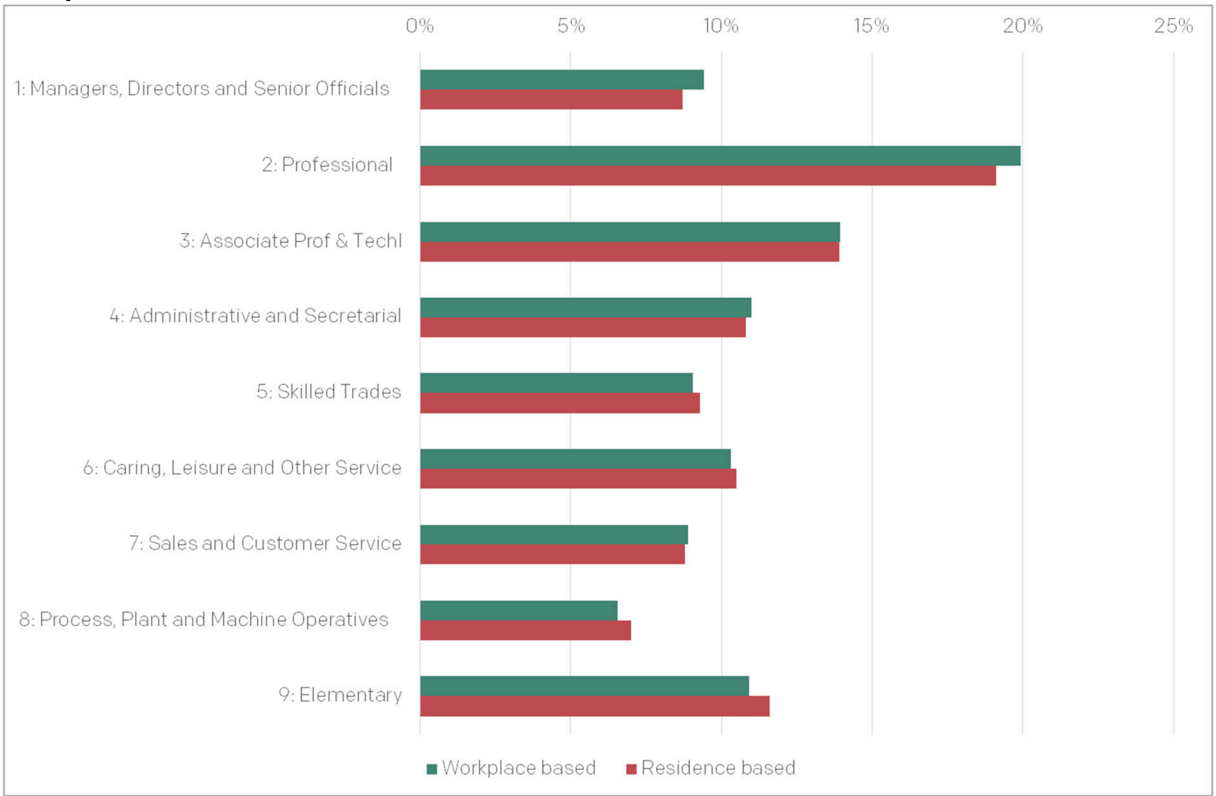
Figure 4.23: Occupational profile of Greater Manchester residents, 2016/17



Source: Annual Population Survey

4.57 Figure 4.23 shows that Greater Manchester has a smaller proportion of managers, directors and senior officials than both the regional and national averages, at 8.7% of workers. Greater Manchester has a slightly larger proportion of professional occupations (19.1%) and associate professional and technical occupations (13.4%) than the North West average, but is below the national average figures in these occupations. Greater Manchester is also under-represented in skilled trades occupations compared to the North West and England and Wales; the North West region is slightly over-represented in skilled trades occupations compared to nationally.

Figure 4.24: Occupation profile of Greater Manchester, workplace and residence based comparison, 2016/17



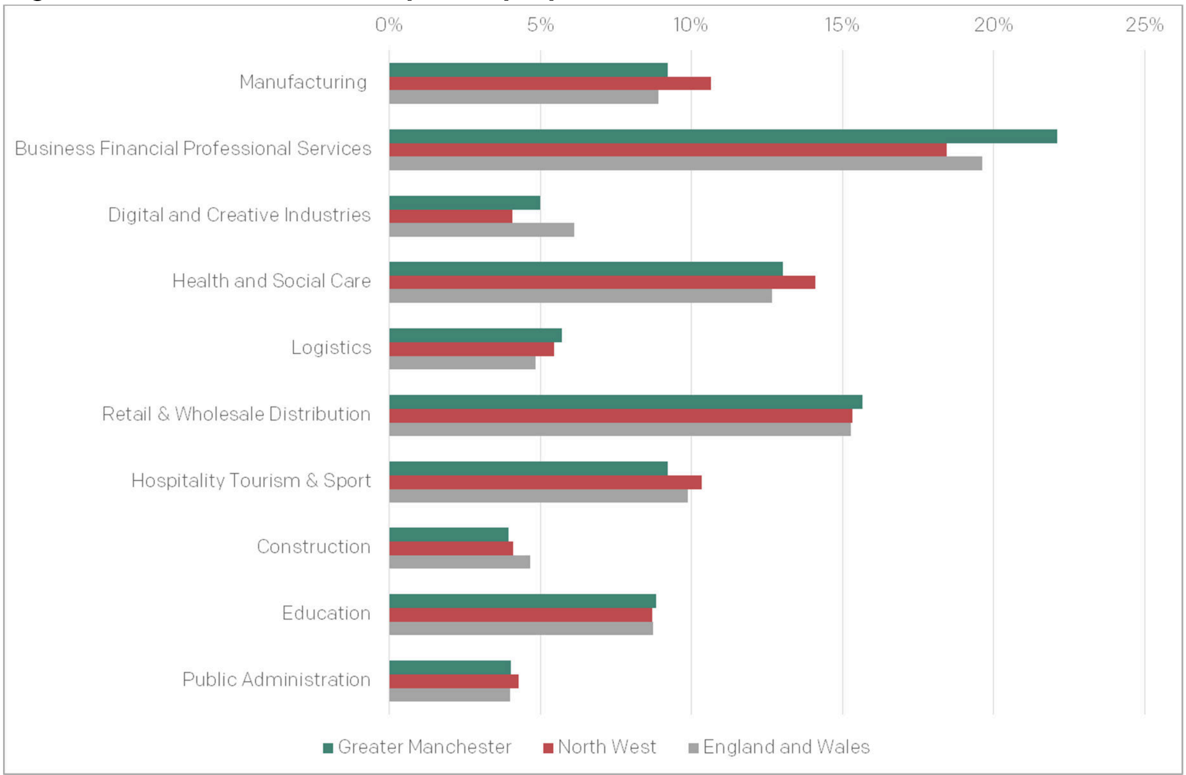
Source: Annual Population Survey

4.58 Figure 4.24 shows that those who work in Greater Manchester are more likely to be managers, directors and senior officials than those who are resident in Greater Manchester; this is also the case for professional occupations and, to a lesser extent, administrative and secretarial occupations. Greater Manchester residents are more likely to be employed in skilled trades occupations, as well as caring occupations. Those living in Greater Manchester are also more likely to be employed as process, plant and machine operatives or in elementary occupations. These differences, which arise as a result of commuting patterns, are typical for most cities/city regions.

Industry of employment

4.59 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 fairly closely with the national sector picture, suggesting the conurbation has a diverse economy.

Figure 4.25: Workers' industry of employment, 2016



Source: Business Register and Employment Survey, 2016

4.60 Figure 4.25 shows that Greater Manchester has a higher proportion of people employed in Business, Financial and Professional Services than both the North West and national averages, with 22% of employees working in this sector. This is likely to be due to a number of 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.

4.61 Over 9% of employees (or 114,000 people) are working in the Manufacturing sector, which is above the national average employment rate. Major employers in Greater Manchester include Siemens, Procter & Gamble, Kellogg's and Warburtons.

4.62 Retail and Wholesale is a significant employment sector for Greater Manchester accounting for 15% of employment, as is Health and Social Care which employs 13% of workers.

4.63 Logistics is an important sector for Greater Manchester, employing 6% of workers, which is above the North West and national average levels. The key locations for logistics employment include Port Salford and Carrington, Logistics North and Manchester Airport.

4.64 Digital and Creative industries also account for an above average proportion of workers in Greater Manchester compared to the North West as a whole. MediaCityUK is a major asset in this industry, with employers based here including the BBC and ITV. There are also significant assets in the Oxford Road Corridor area of Manchester.

Salaries by industry of employment

Table 4.2: Median salary (North West) per sector

Sector	Median full-time equivalent salary
Accommodation and food	£11,501
Administrative and support	£19,396
Agriculture	x
Arts, entertainment and recreation	£13,762
Construction	£27,643
Education	£22,162
Electricity, gas, & steam	£31,000
Financial services	£26,568
Human health and social work	£19,718
Information and communication	£31,608
Manufacturing	£29,025
Mining and quarrying	£36,166
Other services	£18,000
Professional services	£25,826
Public administration and defence	£27,796
Real estate	£24,171
Transportation and storage	£26,500
Water supply; sewerage, waste management	£28,724
Wholesale and retail trade	£17,075
Overall median salary	**£22,090**

Source: Annual Survey of Hours and Earnings (ASHE) 2017

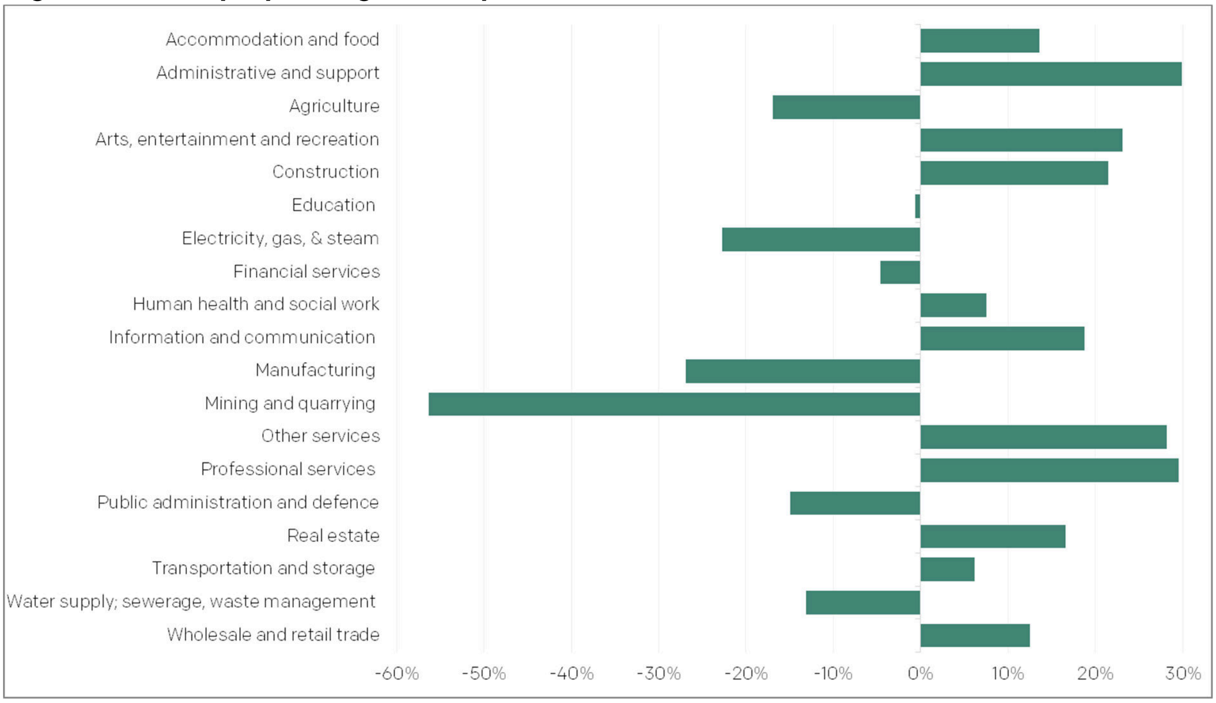
Where 'x' estimates are considered unreliable for practical purposes

4.65 Table 4.2 shows the median salary by sector for the North West. It shows that some of the most important sectors for Greater Manchester have full-time equivalent salaries above the North West median salary of £22,000, with Information and Communication services (Digital sector) having a median salary of over £31,000, Financial and Professional Services having median salaries of over £25,000, and Manufacturing with a median salary of £29,000. Transportation and Storage (Logistics) also has a median salary higher than the North West median. However, Wholesale and Retail trades and Arts, Entertainment and Recreation all have salaries significantly below the North West median.

Future Employment Growth

4.66 The Greater Manchester Forecasting Model (GMFM) forecasts employment growth by sector for the period 2015-2035.

Figure 4.26: Employment growth by sector 2015-2035



Source: GMFM 2017

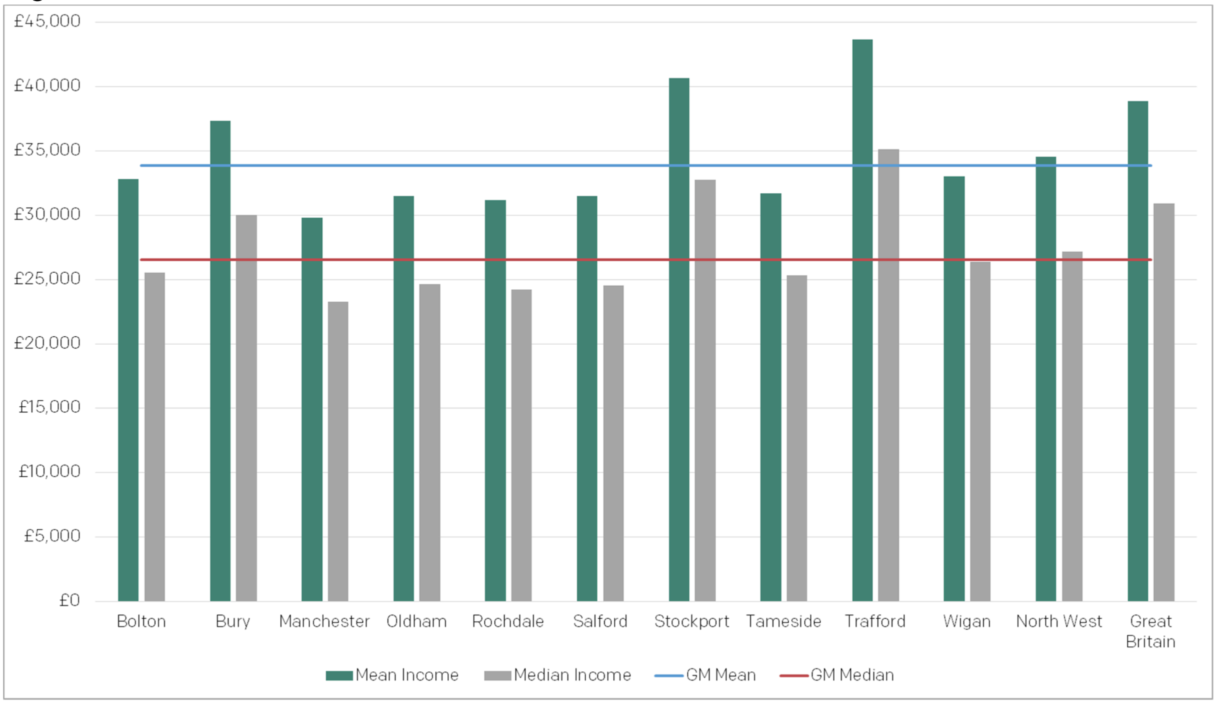
4.67 Figure 4.26 shows that the Administration and Support, Professional Services and Other Services sectors are going to see the greatest increases in employment of around 30% over the period 2015 to 2035. Arts, Entertainment and Recreation and Construction are also set to grow by over

20%, with Information and Communication, Real Estate, Accommodation and Food services and Wholesale and Retail trades also experiencing lower levels of growth over the period. Declines in employment will be seen in mining and quarrying and agriculture, which are currently extremely small sectors 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

4.68 Average household incomes in Greater Manchester are somewhat lower than the regional averages and significantly lower than those of Great Britain as a whole.

Figure 4.27: Resident mean and median household incomes, 2016

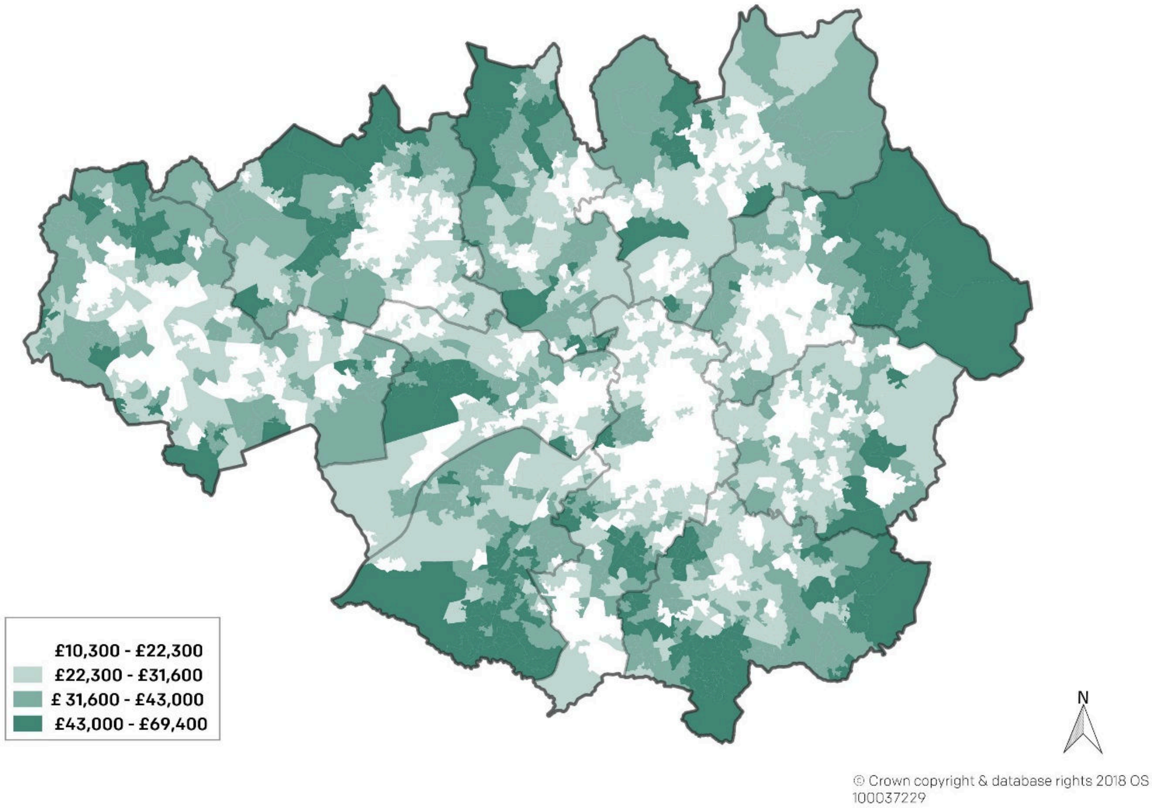


Source: CACI Paycheck 2017

4.69 The chart above shows that there is significant variation between the districts in terms of average income levels. Manchester residents have the lowest mean and median incomes, at £29,800 and £23,300 respectively. These are significantly below the Greater Manchester mean of £39,900 and median of £26,600. Rochdale, Oldham, Salford, Tameside and Bolton are also below the Greater Manchester average. The median household income in Wigan is nearly the same as that for Greater Manchester, but the mean figure is below the Greater Manchester average. Bury, Stockport and Trafford all have median and mean incomes significantly above the Greater Manchester averages. Trafford's median income is well above the Greater Manchester mean income. In general, mean incomes are higher than median, as they are pushed upwards by relatively small numbers of households with very high incomes. Areas where the gap between the two measures is relatively small (such as Wigan) may be seen as having a more equal household income distribution.

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

Map 4.1: Greater Manchester Median Household Income, 2016



Source: CACI Paycheck 2017

4.71 The map shows that in general, household incomes are higher in the areas on the outer edge of the conurbation, including Saddleworth in Oldham, Bramhall and Marple in Stockport, Hale in Trafford and Ramsbottom in Bury, and also in parts of the regional centre and Salford Quays. Town centres and the northern and eastern parts of Manchester have lower median incomes; notably all districts have a diverse mixture of higher and lower income areas.

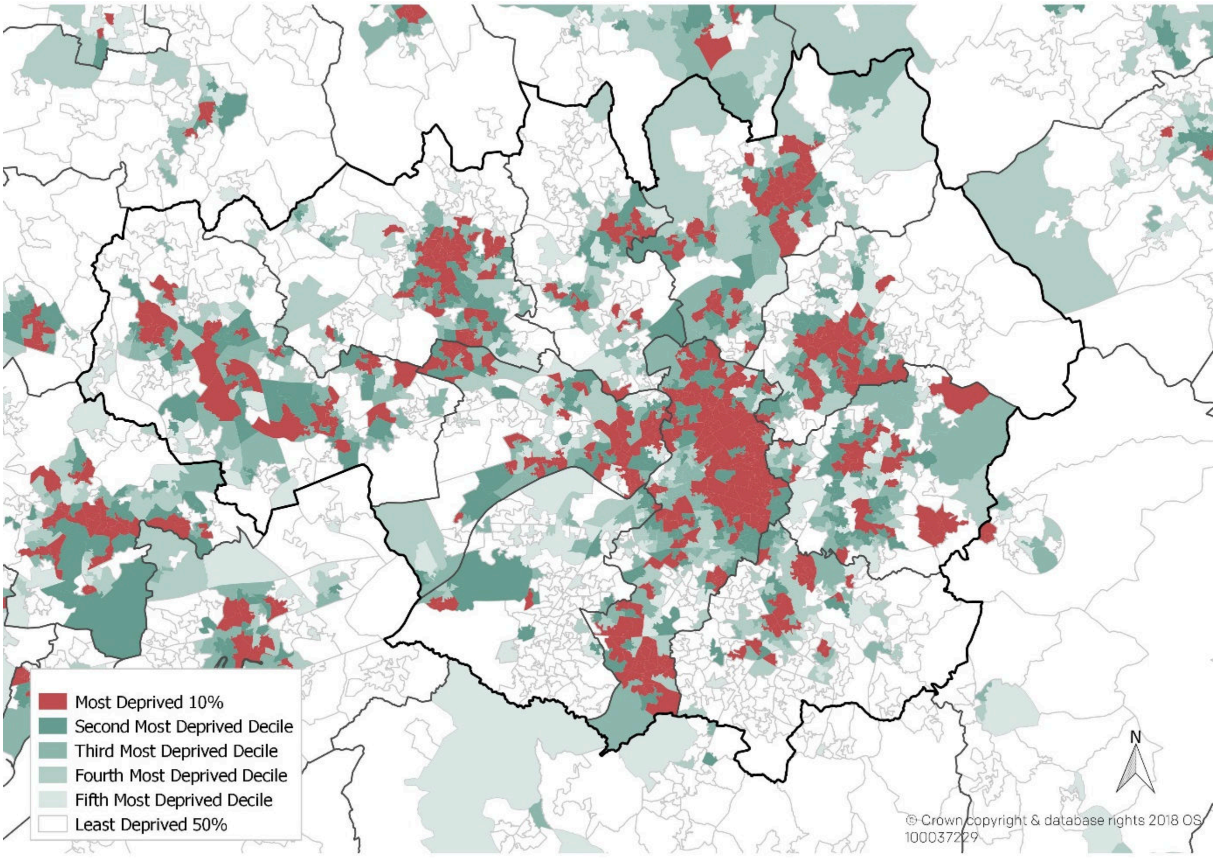
Deprivation

4.72 There is a concentration of deprivation in the North West as a whole, with 20% of North West Lower Super Output Areas (LSOAs)[31] in the top 10% most deprived in England and 59% in the top 50% most deprived. The more severe deprivation occurs in the major urban conurbations, including Greater Manchester, with cities such as Manchester most affected. It should be noted that the Index of Multiple Deprivation (IMD) is a relative, not absolute, approach to measuring deprivation.

4.73 Map 4.2 below shows the deprivation deciles in Greater Manchester and the immediately surrounding areas on the overall Index of Deprivation. The white areas represent the least deprived 50% LSOAs nationally and the red are the most deprived 10%. All Greater Manchester districts contain some LSOAs in the most deprived decile, although clearly Manchester has particular concentrations of the most deprived and Trafford the least.

[31] A Lower Super Output Area is an ONS Census statistical geographical area containing around 1,200 households or 3,000 residents.

Map 4.2: Deprivation in Greater Manchester by lower super output area, 2015



Source: MHCLG, English Indices of Deprivation, 2015

4.74 There are nine local authorities in the North West which are among the ten most deprived authorities in England. Table 4.3 shows that Manchester ranks number 1 in the overall ranking, with Rochdale 25th and Salford ranked as 27th.

Table 4.3: Summary of IMD rankings In Greater Manchester districts by domains, 2015[32]

Area	IMD Rank of average rank	IMD Rank of average score	IMD Rank of proportion of LSOAs in most deprived 10% nationally	IMD Rank of extent	IMD Rank of local concentration
Bolton	64	51	40	35	44
Bury	132	122	87	108	91
Manchester	1	5	5	1	11
Oldham	51	34	27	29	28
Rochdale	25	16	17	21	19
Salford	27	22	16	22	16
Stockport	178	150	93	136	79
Tameside	34	41	50	40	53
Trafford	222	201	155	161	145
Wigan	107	85	66	68	57

Source: MHCLG, English Indices of Deprivation, 2015

1= most deprived, 326=least deprived

Homelessness

4.76 There are many different forms of homelessness, including 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.

4.77 In Greater Manchester and nationally, levels of all forms of homelessness have increased over the last five years. Homelessness is a complex issue and there are a variety of personal reasons why an individual or households might experience homelessness, including relationship breakdown, mental health issues, offending issues and substance misuse issues, but these are inter-related with wider housing and economic issues. The leading cause of homelessness in England is the ending of an assured shorthold tenancy and there are increasing concerns about the impact of benefit restrictions on the ability of households to access stable tenancies in the PRS.[33] Research by the Lankelly Chase Foundation has shown that around 58,000 people

[32] The Index of Multiple Deprivation 2015 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 how relatively localised. Rank of average score and average rank is a combination of all the variables used.
[33] See: http://researchbriefings.parliament.uk/ResearchBriefing/Summary/SN01164

annually in the UK experience homelessness, substance issues and offending issues; 31,000 experience homelessness and offending issues; and 34,000 experience homelessness and substance issues.[34]

Table 4.4: Homelessness decisions and acceptances in Greater Manchester districts, 2011/12 and 2016/17[35]

Area	Acceptances: total eligible, homeless and in priority need			Total decisions		
	Total 2011/12	Total 2016/17	% change	Total 2011/12	Total 2016/17	% change
Bolton	276	197	-29%	615	487	-21%
Bury	164	177	8%	369	325	-12%
Manchester	580	1,242	114%	2,205	2,778	26%
Oldham	66	86	30%	101	242	140%
Rochdale	200	296	48%	543	913	68%
Salford	281	340	21%	481	1,210	152%
Stockport	94	238	153%	375	483	29%
Tameside	92	218	137%	542	560	3%
Trafford	156	169	8%	281	273	-3%
Wigan	271	179	-34%	605	377	-38%
Greater Manchester	2,180	3,142	44%	6,117	7,648	25%

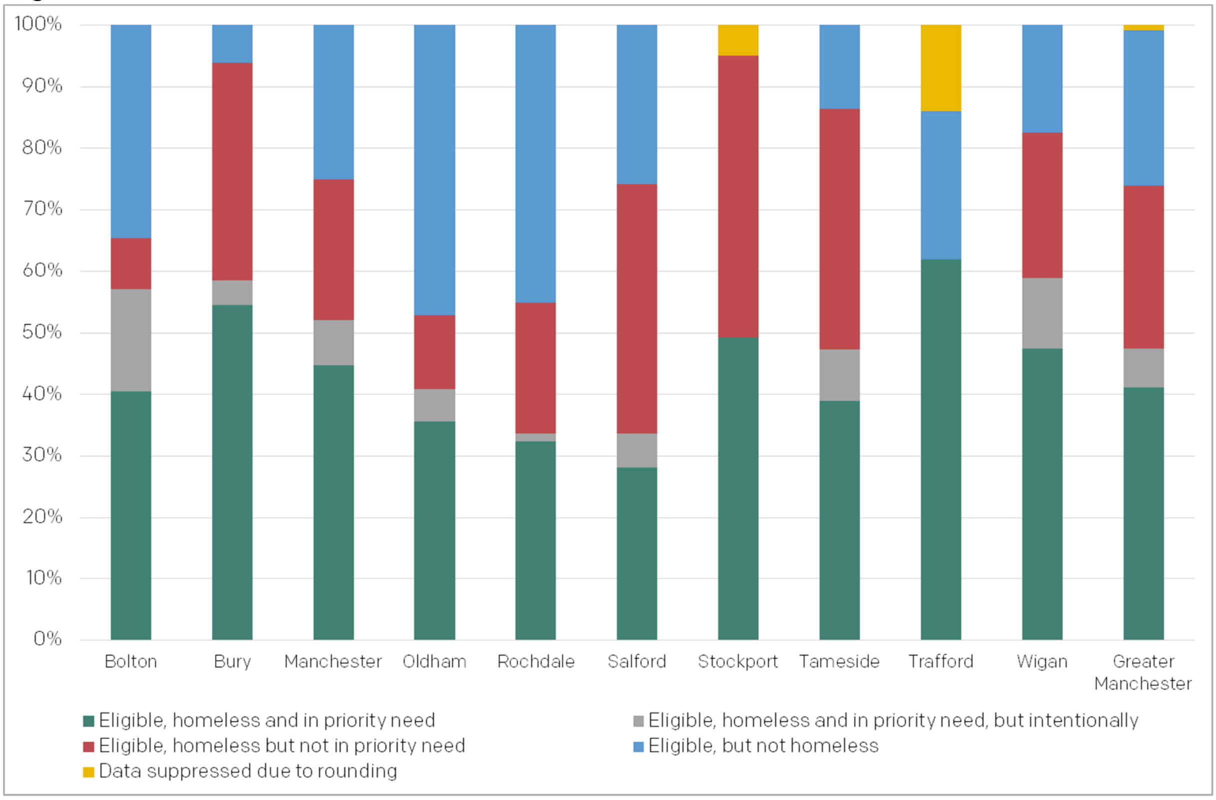
Source: MHCLG Live Table 784: Local authorities' action under the homelessness provisions of the 1985 and 1996 Housing Acts

4.78 The table shows that in Greater Manchester there has been a 44% increase in households being accepted as homeless and in priority need between 2011/12 and 2016/17. The increase has been highest in Stockport, with a 153% increase in acceptances over the period. Manchester has by far the highest number of homelessness acceptances in Greater Manchester at 1,242 in 2016/17, an increase of 114% on 2011/12. There has been a 25% increase in decisions made by local authorities in Greater Manchester, indicating that the number of people considering themselves to be homeless in the

[34] Lankelly Chase Foundation, Hard Edges: Mapping severe and multiple disadvantage- England, 2015
[35] '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 https://www.gov.uk/guidance/homelessness-data-notes-and-definitions

conurbation has increased by a quarter over the period. This increase has been highest in Salford, which made 1,210 decisions in 2016/17, an increase of 152% on 2011/12.

Figure 4.28: Homelessness decisions in Greater Manchester districts, 2016/17



Source: MHCLG Live Table 784: Local authorities' action under the homelessness provisions of the 1985 and 1996 Housing Acts

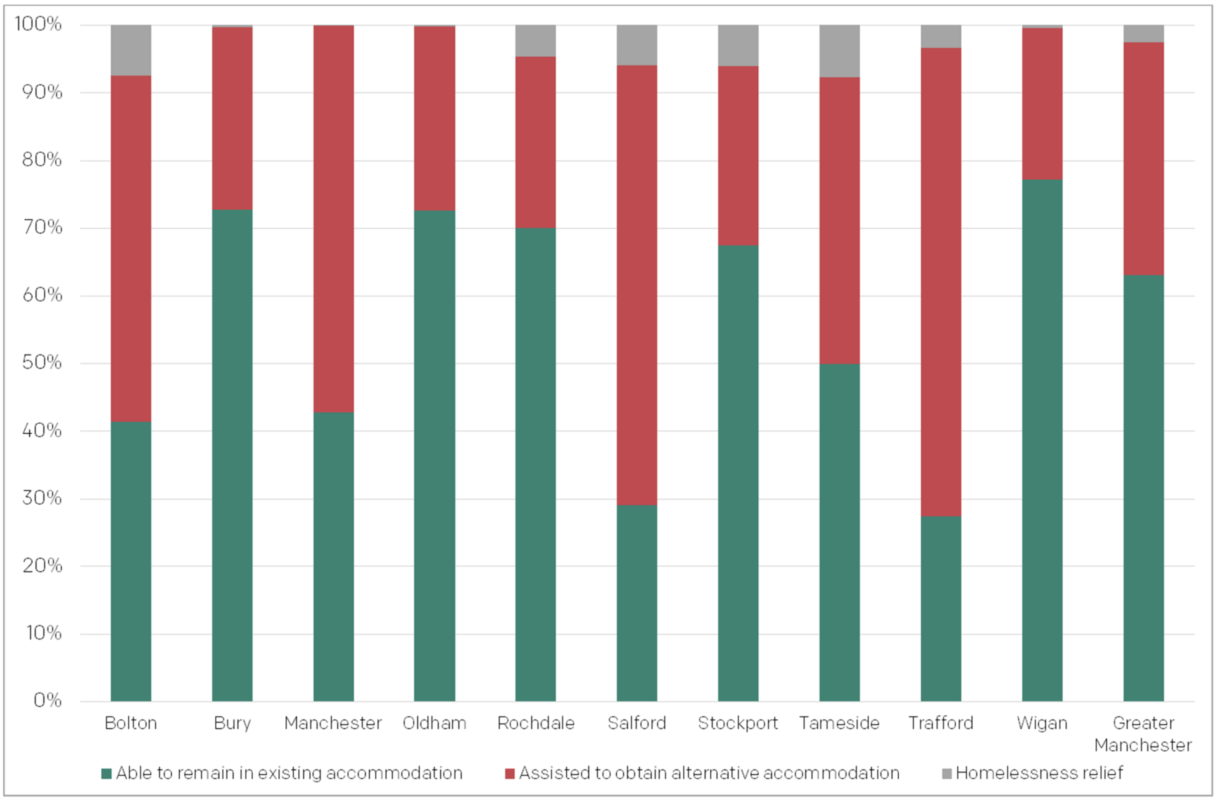
4.79 The chart shows that in Greater Manchester in 2016/17, around 40% of those who presented as homeless to local authorities were considered to be eligible, homeless and in priority need and therefore were owed a 'main homelessness duty' by the council.[36] This was highest in Trafford, where over 60% of those presented were eligible, homeless and in priority need; this was lowest in Salford at less than 30%. Those considered to be intentionally homeless accounted for around 6% of applications in Greater Manchester; this was highest in Bolton at around 17%. Around half of applicants at a Greater Manchester level were found to either be homeless, but not in priority need, or not to be homeless.

[36] For more information, see https://www.gov.uk/guidance/homelessness-data-notes-and-definitions

Homelessness Prevention and Relief

4.80 Households who fall into one of the categories in which no statutory duty is owed may also receive support from the local authority in order to prevent them becoming homeless, or by finding them alternative accommodation relieving homelessness. There were over 17,000 instances of prevention and relief activity in Greater Manchester in 2016/17, a rate of 9.1 per 1,000 households; that rate is higher than that of London (8.28) and largely in line with the national rate.[37] Prevention and relief activity is further broken down below.

Figure 4.29: Homelessness prevention and relief activity in Greater Manchester districts, 2016/17



Source: MHCLG Live Table 792: Total reported cases of homelessness prevention and relief by outcome and local authority

4.81 Figure 4.29 shows that homelessness prevention is by far the most common activity in Greater Manchester, with assisting households to remain in their existing accommodation accounting for over 60% of

[37] MHCLG Live Table 792: Total reported cases of homelessness prevention and relief by outcome and local authority

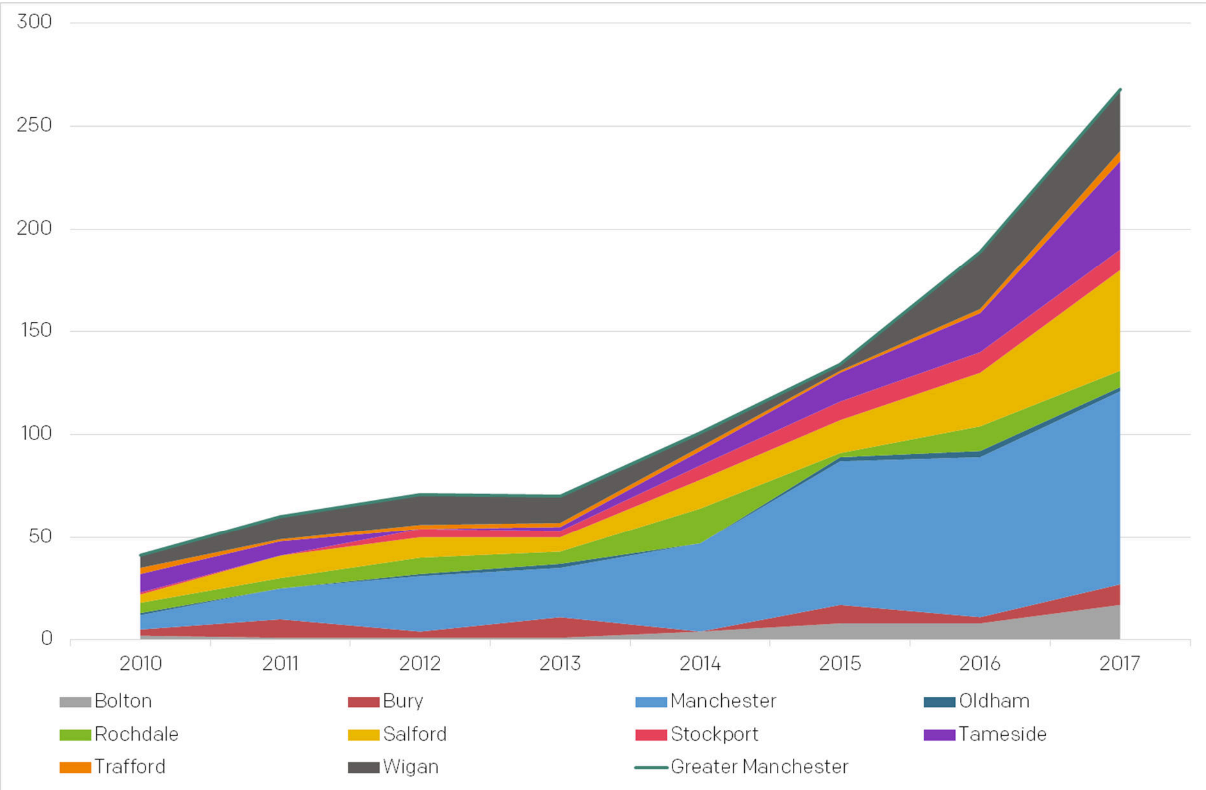
prevention and relief activity across the conurbation. Manchester, Trafford and Salford have high rates of assisting households to obtain alternative accommodation, while Bolton, Tameside and Stockport have above average levels of homelessness relief.

4.82 From April 2018, local authorities have a statutory duty to prevent those who are threatened with homelessness from becoming homeless, by increasing prevention and relief activity and offering support for longer; those who are likely to become homeless within 56 days will be considered to be at threat of homelessness and so will be afforded a statutory prevention duty. This should lead to significantly higher levels of homelessness prevention and relief in Greater Manchester.

Rough Sleeping

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

Figure 4.30: Rough sleeping in Greater Manchester, districts 2010-2017



Source: MHCLG Rough sleeping statistics England autumn 2017 Table 1: Street counts and estimates of rough sleeping in England, Autumn 2010 – 2017

4.84 The chart shows that the number of people sleeping rough in Greater Manchester has increased from 41 in 2010 to 268 in 2017, an increase of 554%. Manchester has seen both the highest number of rough sleepers and the largest increase in numbers, from 7 in 2010 to 78 in 2017, an increase of 1,014%. Rough sleeper data is 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 number of rough sleepers in Greater Manchester and in particular in Manchester, is higher than the totals presented here.

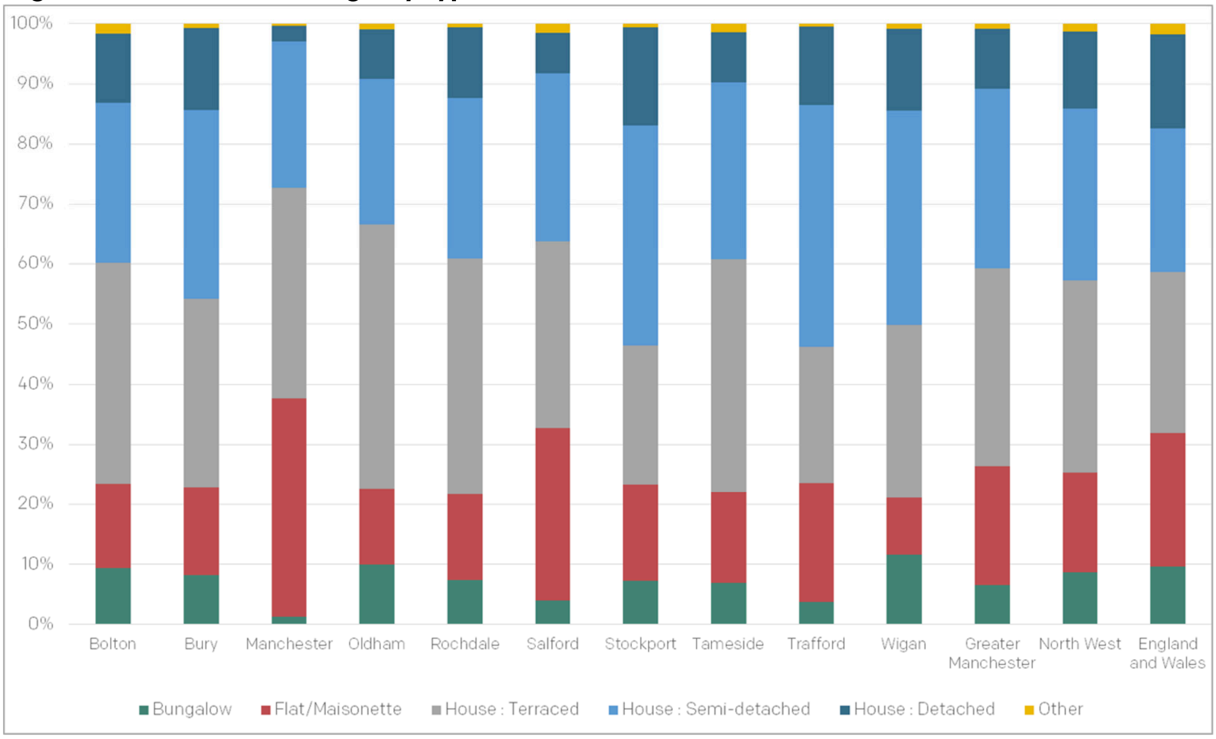
4.4 Dwelling stock profile

Profile of current dwellings

Type and size of dwellings

4.85 In March 2017, just over 1.2 million dwellings were recorded in Greater Manchester by the Valuation Office Agency (VOA) for Council tax purposes. Of these, the majority are terraced houses (accounting for almost 400,000 dwellings), closely followed by semi-detached houses (360,000).

Figure 4.31: Total dwellings by type, 2017

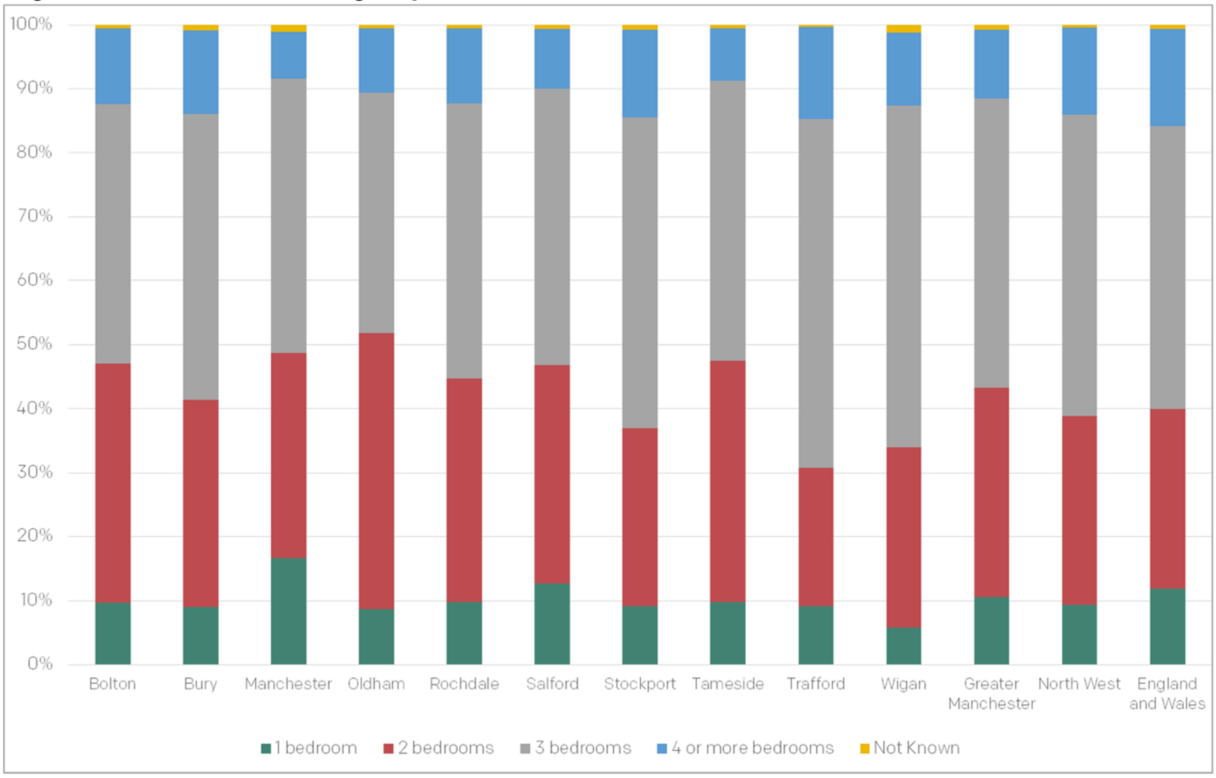


Source: Valuation Office Agency, Table CTSOP3.0: Number of properties by Council tax band, property type and region, county and local authority district, 2017

4.86 Figure 4.31 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.

4.87 Oldham, Rochdale and Tameside 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, as do Bolton, Bury, Rochdale and Wigan. Manchester has only 2.6% 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 likely to be 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.

Figure 4.32: Total dwellings by number of bedrooms, 2017



Source: Valuation Office Agency, Table CTSOP3.0: Number of properties by Council tax band, property type and region, county and local authority district, 2017

4.88 Figure 4.32 shows that Greater Manchester has a higher proportion of one bedroomed dwellings than the North West, but slightly lower proportion than England and Wales.

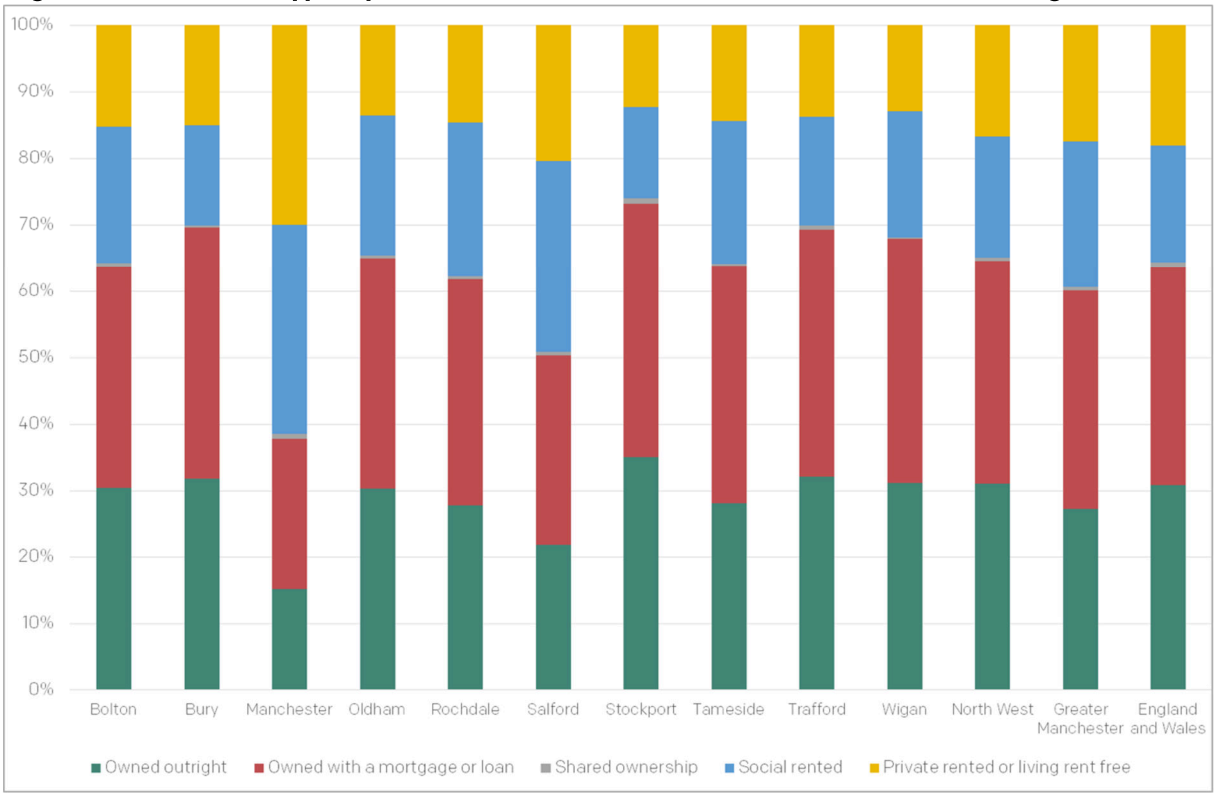
4.89 Greater Manchester has a larger proportion of two bedroomed dwellings than in the North West as a whole and nationally. Three bedroomed dwellings are in line with the national average but slightly lower than the North West, and Greater Manchester has a lower proportion of dwellings with four or more bedrooms than both the regional and national averages.

4.90 Manchester has the highest proportion of one bedroomed dwellings at 17% and Salford also has a larger proportion than the national average (13%). Wigan's proportion of one bedroomed properties is around half of the national figure. Trafford, Stockport and Bury all have proportions of homes with four or more bedrooms that are significantly above the Greater Manchester level, but in line with the national average.

Tenure of housing

4.91 Figure 4.33 shows that overall, Greater Manchester is largely in line with the national average in terms of tenure, 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%.

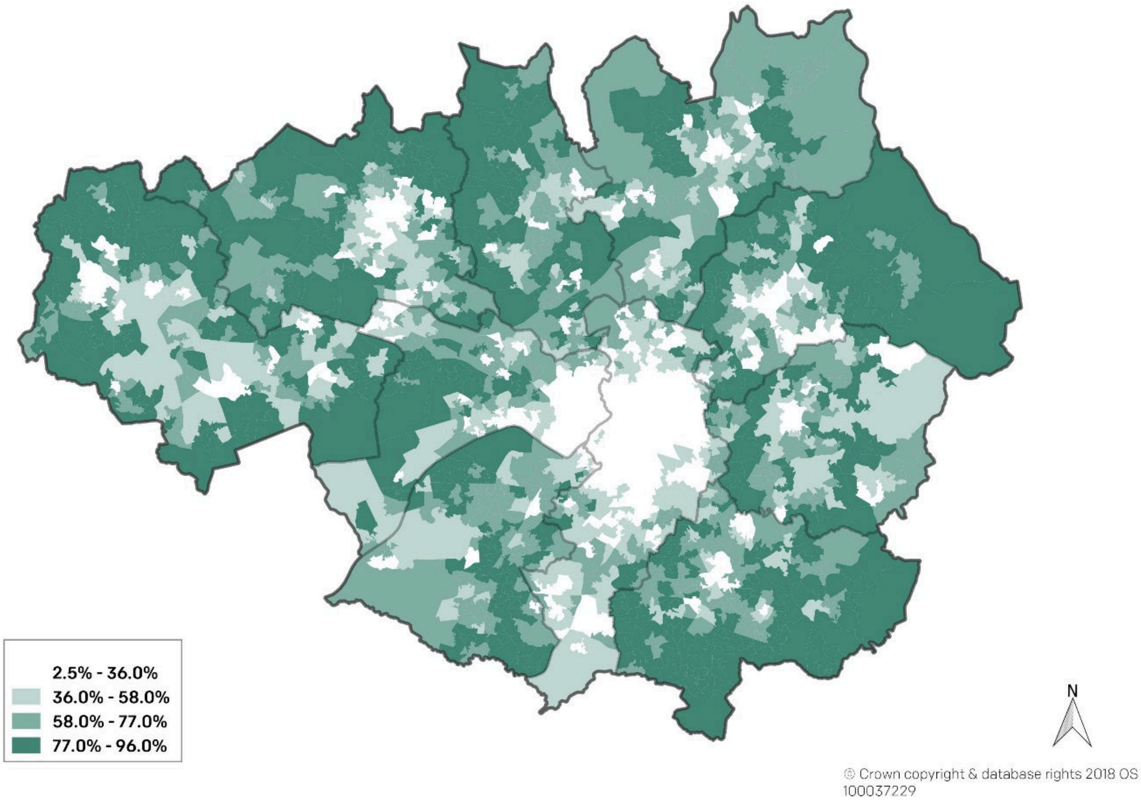
Figure 4.33: Tenure type by district, Greater Manchester, North West and England, 2011



Source: Census 2011

4.92 The above chart shows that 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 far larger proportions of households living in both social housing, which accounts for almost 32% of stock, and private rented accommodation. This tenure represents 30% of stock in Manchester, as opposed to the 18% seen nationally. Salford also has above average levels of social renting (29%) and private renting (20%) compared to both Greater Manchester and England and Wales as a whole.

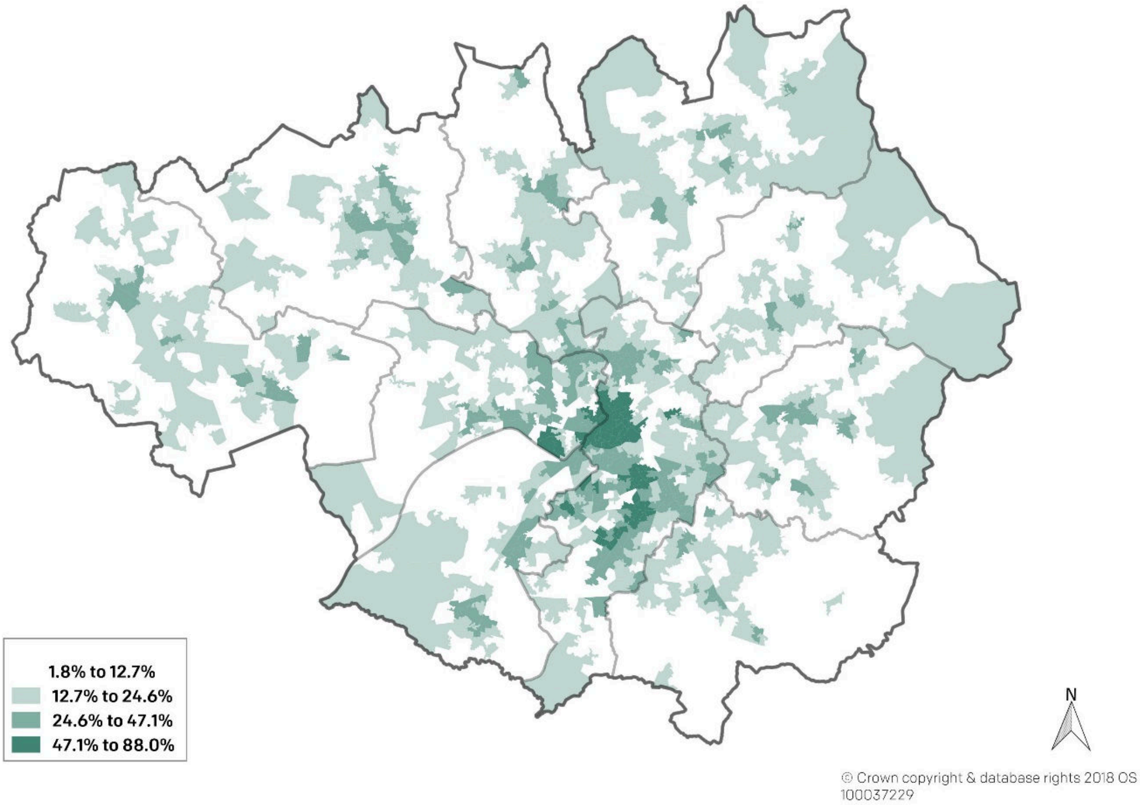
Map 4.3: Spatial distribution of owner-occupation in Greater Manchester, 2011



Source: Census 2011

4.93 Map 4.3 shows that levels of owner-occupation are low in the regional centre, towards south Manchester and in the 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.

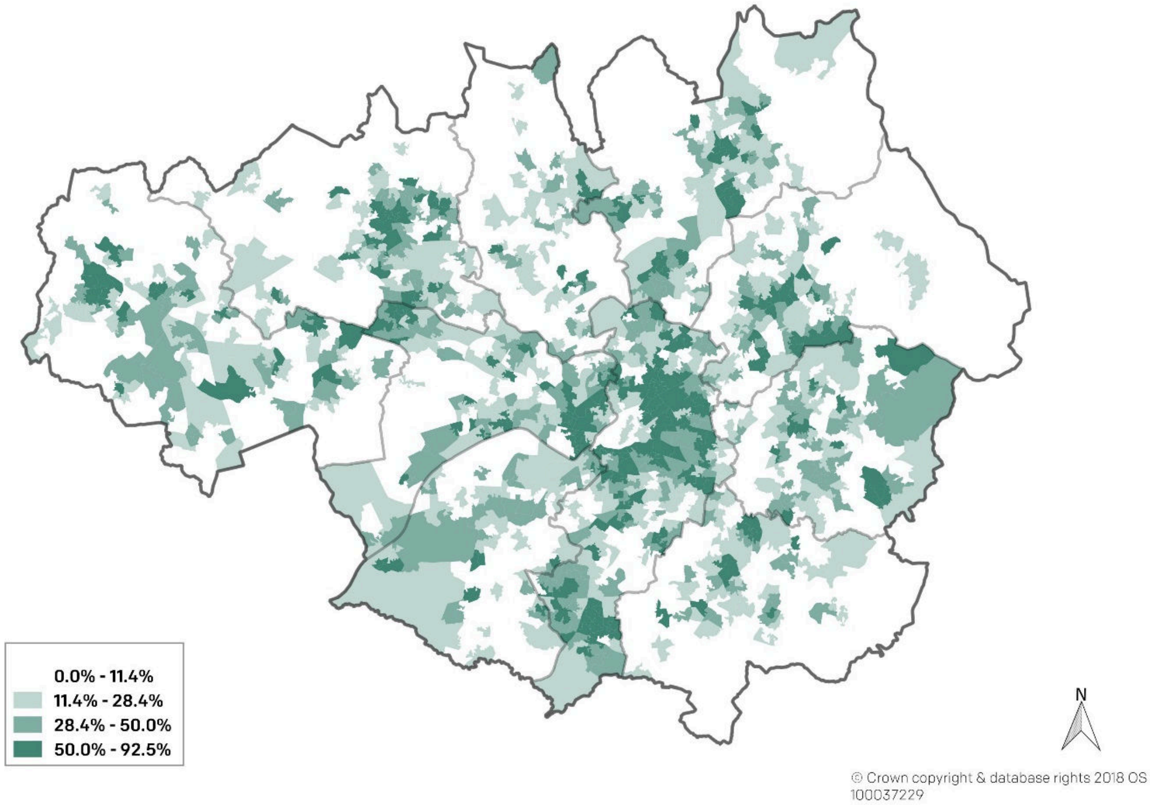
Map 4.4: Spatial distribution of households renting privately in Greater Manchester, 2011



Source: Census 2011

4.94 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, all of the 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 households in social rented accommodation in Greater Manchester, 2011



Source: Census 2011

4.95 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.

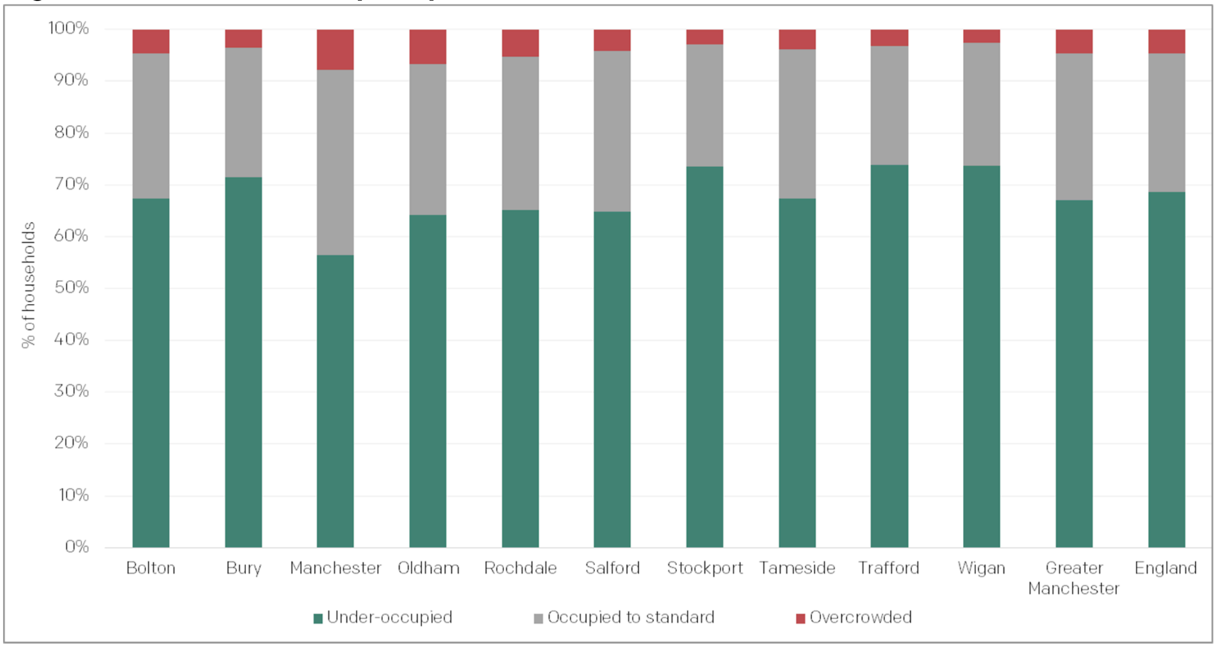
Overcrowding, under-occupation and concealed households

Overcrowding and under-occupation

4.96 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.

4.97 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 and is 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 4.34 below.

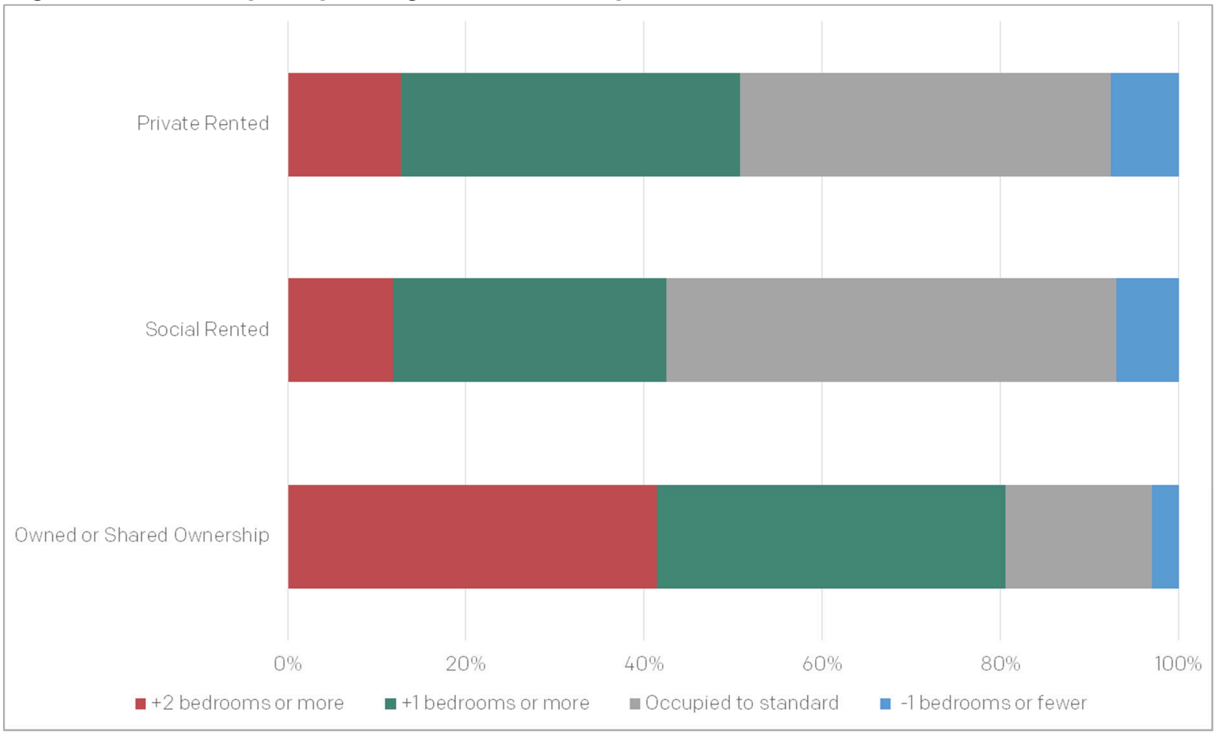
Figure 4.34: Level of occupancy (bedrooms), 2011



Source: Census 2011

4.98 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 4.35: Occupancy rating (bedrooms) by tenure, Greater Manchester, 2011



Source: Census 2011

4.99 Figure 4.35 shows occupancy ratings by tenure across Greater Manchester. In the PRS and social rented sector, the majority of homes are occupied to standard, meaning residents have the expected number of bedrooms needed based on the number of occupants. However, the majority 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.

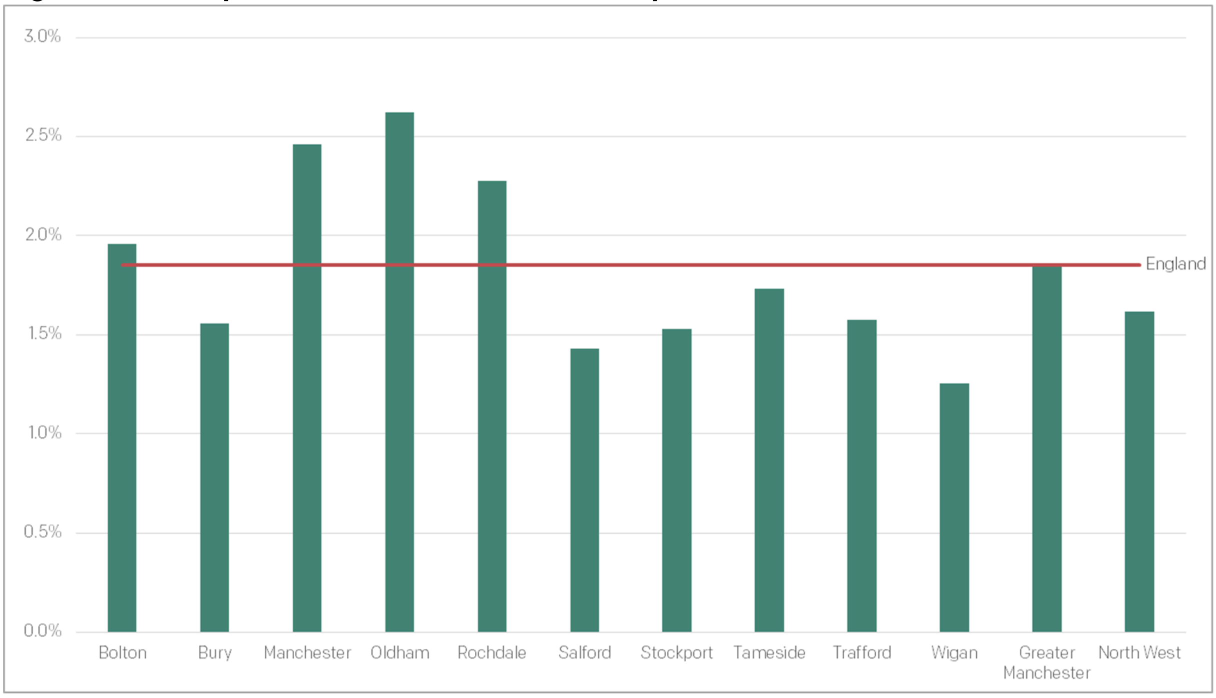
4.100 Overcrowding is most common in the PRS, with 8% of homes having at least one bedroom fewer than would be expected. Around 7% of social housing tenants are overcrowded, which is more than double the figure for those who own their own homes (3%).

See Chapter 8.1 Characteristics of the Housing Market Area appendices and Chapter 8.2 Overcrowding, under-occupation and concealed families appendices for further information.

Concealed families

4.101 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. As a result of these definitions, the data presented here reflects families rather than households.

Figure 4.36: Proportion of concealed families by Greater Manchester district, 2011



Source: Census 2011

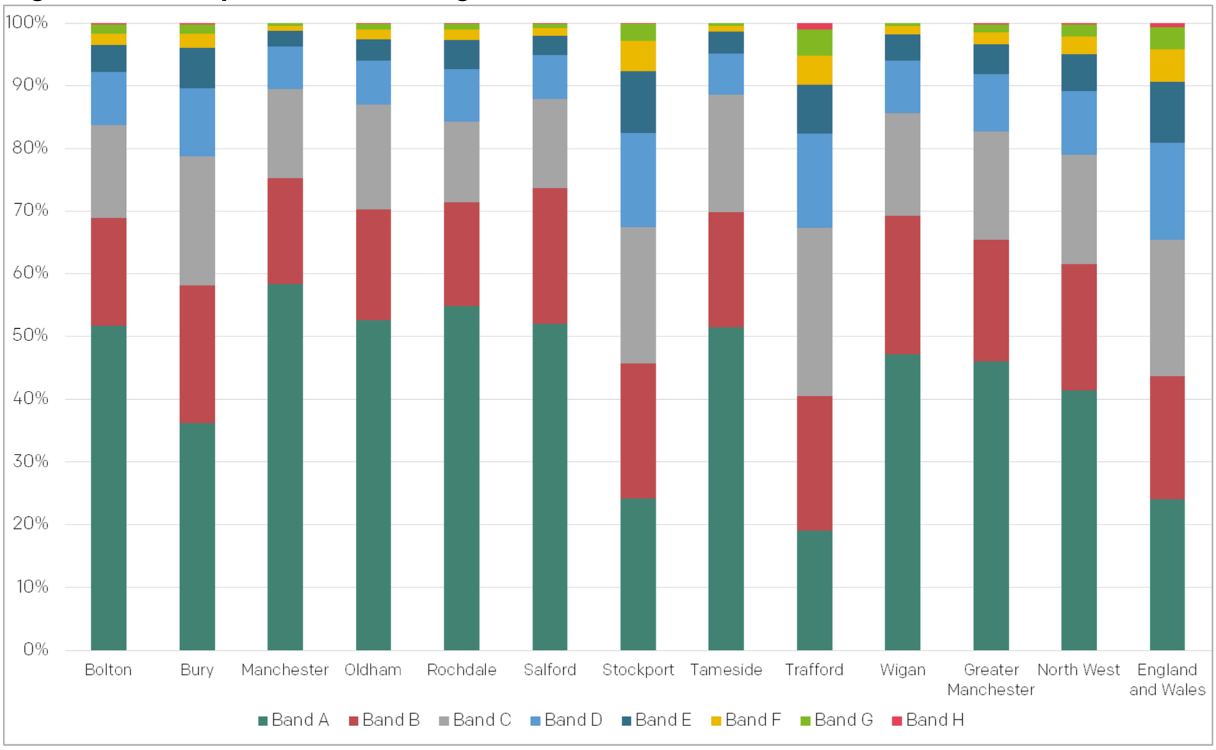
4.102 There were around 13,000 concealed families recorded at the 2011 Census, representing almost 2% of families in Greater Manchester, which is in line with the rate for England but slightly above the average for the North West. Manchester has the highest absolute number of concealed families, but Oldham has the highest proportion of families that are concealed, followed by Manchester, Rochdale and Bolton, all of which are above the England 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.

4.103 Further information on occupancy ratings and concealed households can be found in Chapter 5.

Council tax bands

4.104 The Valuation Office Agency 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 4.37: Proportion of housing stock in each Council tax band, 2017



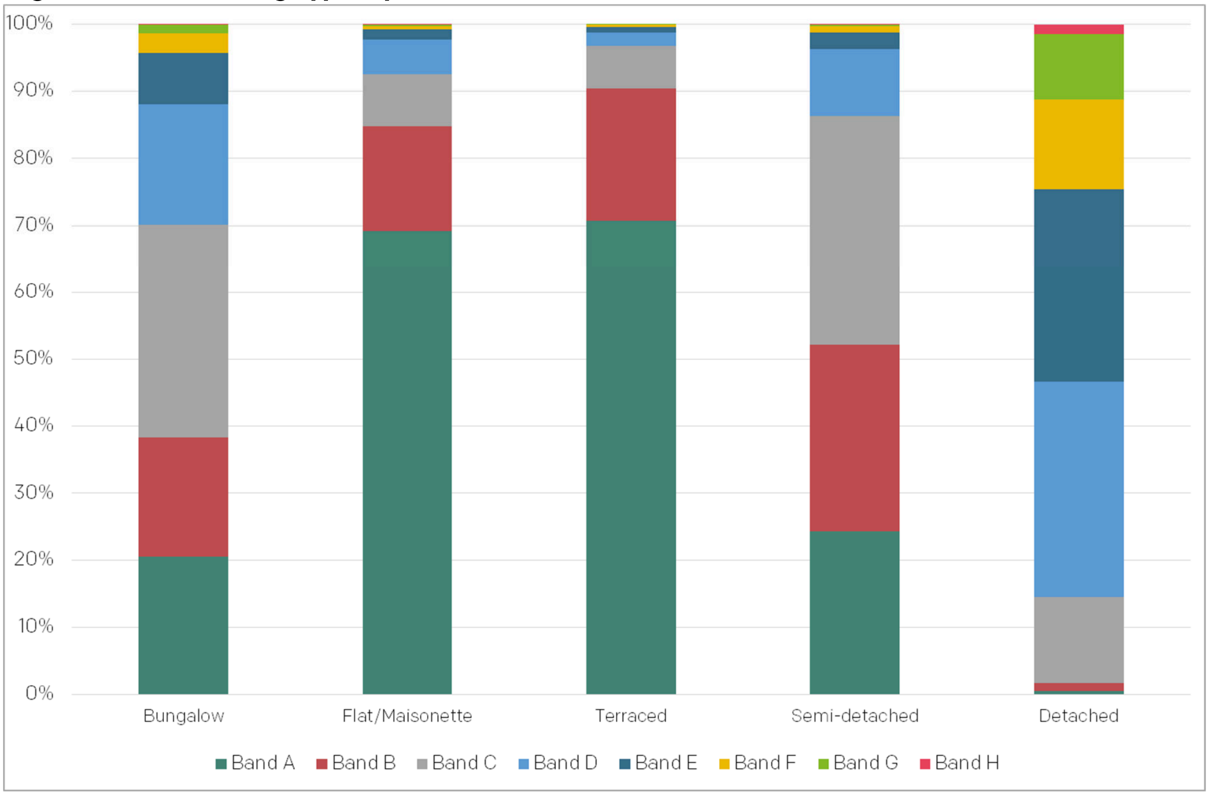
Source: Valuation Office Agency, Table CTSOP3.0: Number of properties by Council tax band, property type and region, county and local authority district, 2017

4.105 Figure 4.37 shows that Greater Manchester has a higher proportion of band A properties than the North West and considerably higher than England and Wales as a whole. Band B properties are largely in line with the North West and England and Wales averages; the proportion of properties in band C is in line with the North West average but some way below the England and 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.

4.106 Trafford, Stockport and Bury are the areas with the lowest proportions of band A stock, reflecting the larger share of higher value properties in these districts. Just 19% of Trafford's stock is in band A, in comparison to almost half of Greater Manchester stock. For the North West, 40% of stock is band A, and 24% for England and Wales. Stockport is in line with the national average with 24% of its housing in band A. Manchester has the largest proportion of its housing in band A at 58%, followed by Rochdale at 55%. There is less variation between districts in terms of band B properties.

Trafford, Stockport and Bury have higher proportions of properties falling into bands C and D. Stockport and Trafford have levels of properties in bands E and above similar to the national average.

Figure 4.38: Housing type by Council tax band, 2017



Source: Valuation Office Agency, Table CTSOP3.0: Number of properties by Council tax band, property type and region, county and local authority district, 2017

4.107 Figure 4.38 shows the relationship between property type and Council tax band. As might be expected, 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 80% of detached houses are in bands D and above, with more than half in bands E and above.

Energy Performance Certificate ratings

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

4.109 As from 1 April 2018 there will be a requirement for any properties rented out in the PRS to normally 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.

4.110 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).

4.111 Table 4.5 provides EPC data retrieved in October 2017 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. Just 7% of properties with an EPC rating had a rating of B or above.

Table 4.5: Greater Manchester domestic property EPC ratings - all transactions*

Area	EPC rating						
	A	B	C	D	E	F	G
Bolton	0.1%	5.3%	28.5%	43.9%	17.4%	3.8%	1.1%
Bury	0.0%	4.3%	24.4%	45.9%	20.0%	4.3%	1.1%
Manchester	0.1%	8.3%	33.7%	37.7%	15.8%	3.4%	1.0%
Oldham	0.1%	5.8%	24.9%	45.9%	18.8%	3.5%	0.9%
Rochdale	0.1%	6.8%	28.7%	43.2%	16.7%	3.5%	1.0%
Salford	0.0%	10.8%	40.3%	32.7%	12.8%	2.6%	0.7%
Stockport	0.1%	4.7%	23.6%	43.8%	22.0%	4.9%	1.0%
Tameside	0.1%	5.1%	32.6%	42.8%	15.3%	3.1%	1.0%
Trafford	0.0%	5.1%	24.5%	44.2%	20.6%	4.6%	1.0%
Wigan	0.1%	5.5%	25.3%	45.4%	18.6%	4.0%	1.1%
Greater Manchester	0.1%	6.6%	29.6%	41.7%	17.4%	3.7%	1.0%

Source: MHCLG, Energy Performance of Buildings Data England and Wales, October 2017

A breakdown of EPC ratings by Greater Manchester district is available in *Appendix 8.1*.

4.5 Migration characteristics

4.113 The use of migration data to determine the Greater Manchester market area has already been discussed in Chapter 2.2 Household Migration. This section looks in a little more detail at the characteristics of the migrating households between areas of England and Wales in terms of composition and age.

Household Composition

4.114 Table 4.6 below shows that in the 12 months before the Census was taken, 30,200 households flowed into Greater Manchester and 26,432 flowed out (from both the rest of the UK and outside the UK) – a net figure of 3,768 households moving in to 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.

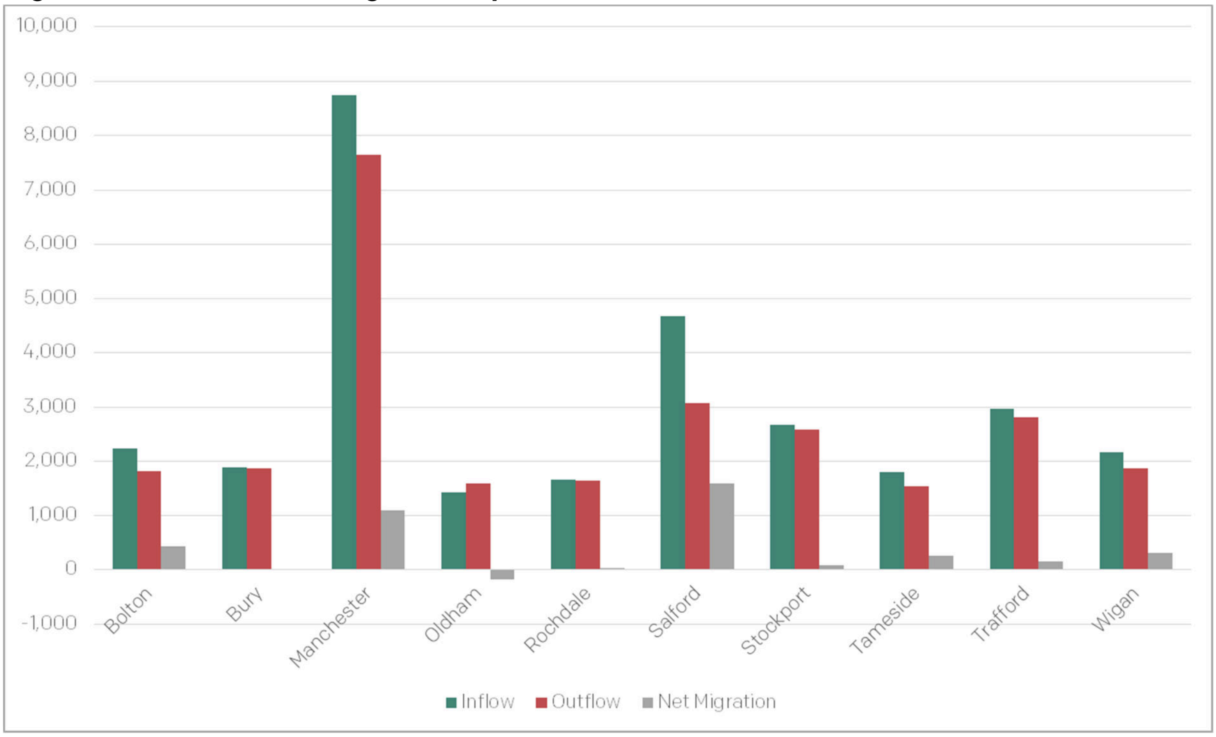
Table 4.6: Household migration by household composition, 2011

	Inflow				Outflow				Net Change	
	Greater Manchester		North West		Greater Manchester		North West		Greater Manchester	North West
	No.	%	No.	%	No.	%	No.	%	No.	No.
Total	30,200	100.0	31,312	100.0	26,432	100.0	20,820	100.0	3,768	10,492
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

Source: Census 2011

4.115 Figure 4.39 shows these household flows by district in Greater Manchester. More details of household composition at district level are also available in appendix 8.1. 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 4.39: Household migration by Greater Manchester districts, 2011



Source: Census 2011

Age

4.116 Table 4.7 below shows the inflow and outflow of households by age group (by age of the head of household or household reference person) for Greater Manchester and the North West. In Greater Manchester, the majority of 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 household reference persons under 24 flowing into the area and a significantly higher percentage of household reference person in-flows over 50 at 23.8%.

Table 4.7: Household migration by age, 2011

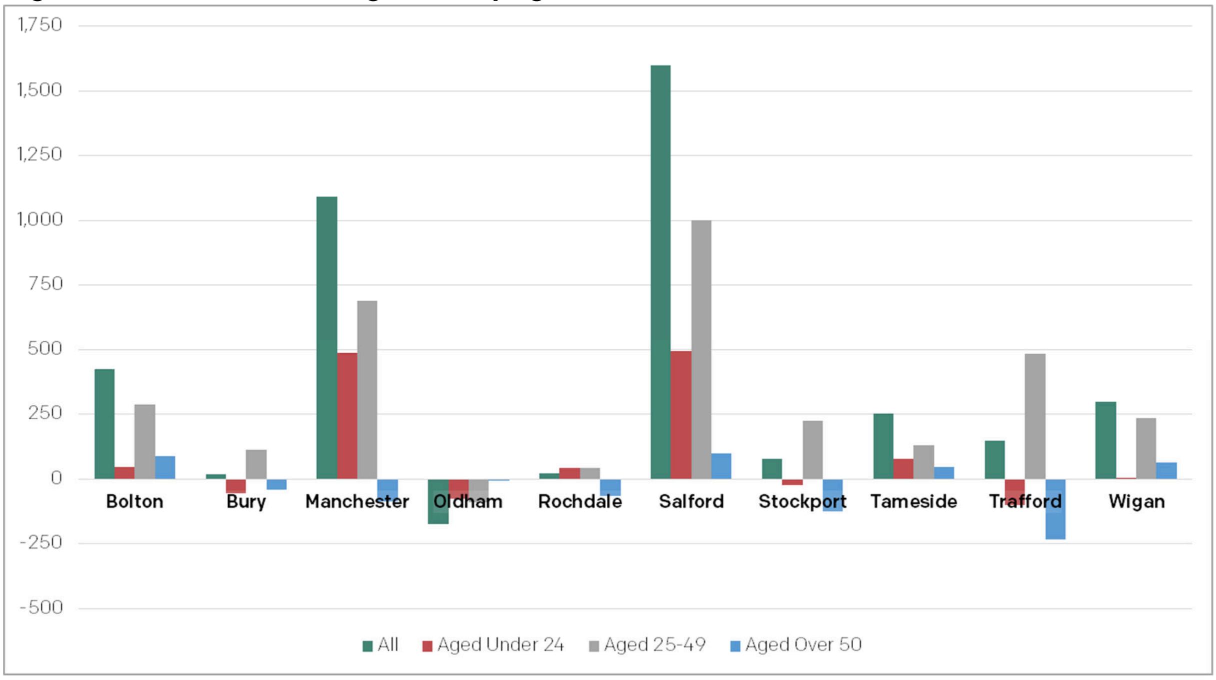
	Inflow				Outflow				Net	
	Greater Manchester		North West		Greater Manchester		North West		Greater Manchester	North West
	No.	%	No.	%	No.	%	No.	%	No.	No.
Total	30,200	100	31,312	100	26,432	100	20,820	100	3,768	10,492
Under 24	4,494	14.9	4,956	15.8	3,592	13.6	2,687	12.9	902	2,269
Aged 25 to 49	20,622	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

Source: Census 2011

4.117 Greater Manchester showed a net decrease in the number of households where the household reference person 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 category.

4.118 Figure 4.40 below shows the net household migration numbers by age of the household reference 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 household reference person was over 50 and under 24.

Figure 4.40: Household migration by age and Greater Manchester district, 2011



Source: Census 2011

4.6 Need for different sizes, types and values of homes

4.119 Following on from [Chapter 3](), which set out the Local Housing Need for Greater Manchester, the analysis in this chapter aims to estimate the need for homes of different types, sizes and values in Greater Manchester. Paragraph 020 of Planning practice guidance (PPG) states that the type, size and tenure of housing needs to be considered separately from the Local Housing Need, which is not broken down by these variables.

4.120 The guidance 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.

Type and size methodology

Step 1: Census data analysis

4.121 The Census provides the most comprehensive source of data on accommodation type (in terms of dwelling type and size), household composition and age of the head of the household. To allow all of these variables to be compared, and to enable examination of trends in how households have occupied dwellings, data tables were commissioned from the Census Commissioned Tables Team. The Census tables used for this analysis are as follows:

- *Table C1398 - Age of Household Reference Person (HRP) by household composition by tenure by bespoke accommodation type (excluding caravans and temporary structures) by number of rooms* (2001);[38]
- *Table CT0345 - Age of Household Reference Person (HRP) by household composition by tenure by bespoke accommodation type (excluding caravans and temporary structures) by number of bedrooms* (2011); and
- *Table CT0770 - Number of rooms by number of bedrooms in households* (2011).

4.122 Tables C1398 and CT0345 allow comparison of:

a. The age of the head of the household (Household Reference Person; HRP);
b. The type of household (e.g. one adult, households with children); and
c. The type, size and tenure of dwelling that the household occupied.

4.123 This allows analysis of trends to understand changes in the way that households have been occupying homes over the Census period.

4.124 Table C1398 provides data on the number of rooms in a dwelling, rather than the number of bedrooms, because at the 2001 Census households were not asked how many bedrooms were in their home.

4.125 Table CT0770 from the 2011 Census provides data on the number of rooms in a dwelling as well as the number of bedrooms. Therefore this table was used to understand the likely number of bedrooms in a dwelling based on the number of rooms, and to apply this proxy for the number of bedrooms to data from 2001 (Table C1398).

4.126 The 2001 Census data tenure categories were amalgamated to prevent statistical disclosure, so that only totals for owner-occupied and rented housing were available. Therefore, the 2011 Census data was combined

[38] Commissioned Tables from the 2001 Census are not currently available online, however can be accessed via the Census Customer Services Team, quoting the table reference. More information can be found here: https://www.ons.gov.uk/census/censuscustomerservices

accordingly so as to be comparable, meaning that there is no split of social and privately rented properties in this analysis.

4.127 The 2001 and 2011 Censuses presented accommodation types and number of rooms/bedrooms differently, and so to ensure read across and comparability, the accommodation type and sizes were amalgamated to the following categories:

- Detached or semi-detached house or bungalow- 3 beds or fewer;
- Detached or semi-detached house or bungalow- 4 beds or more;
- Terraced house or bungalow- 2 beds or fewer;
- Terraced house or bungalow- 3 beds or more;
- Flat maisonette or apartment- 1 bed; and
- Flat maisonette or apartment- 2 beds or more.

4.128 The data was analysed to show the proportionate dwelling split of household types by age of HRP, in 2001 and 2011, as well as the annual change over the period.

Step 2: Household Projections

4.129 The MHCLG Household Projections (2014-based) give detailed household projections by the age of HRP and household type, up to 2035. By applying the Census analysis to the household projections by age and household type, a future picture of the type and size of housing required in Greater Manchester can be built up, accounting for projected demographic changes over the period.

Step 3: Scenarios

4.130 In order to understand the different possible impacts on the future new housing type and size mix for Greater Manchester, three scenarios were applied to the household projections for both dwelling type and size and tenure, as follows:

<u>Scenario 1</u>: Applying the 2011 size and type and tenure mix to the Greater Manchester household projections: This scenario assumes no change to the size and type or tenure of dwelling mix until 2035.

<u>Scenario 2</u>: Continuing the 2001-2011 change to the Greater Manchester household projections: This scenario assumes that the changes in housing type and size and tenure between 2001 and 2011 would be continued until 2035.

<u>Scenario 3</u>: Applying the 2011 size and type and tenure mix found in London to the Greater Manchester household projections: This scenario assumes that Greater Manchester achieves a density, type and tenure mix comparable with that of a global city such as London by 2035 and so models a household type, size and tenure mix more similar to that of the capital.

4.131 Age bands and household types are categorised differently in the Census and the household projections; the read across of these groups used for analysis can be found in Appendix 8.1.

Type and size of housing mix

4.132 The following tables provide percentage ranges showing the indicative mix of the type and size of new homes required for Greater Manchester until 2035.

Table 4.8: Indicative new accommodation type and size mix for Greater Manchester

	Scenario 1 *2011 size and type and tenure mix*	Scenario 2 *2001-2011 trends continue*	Scenario 3 *2011 size and type and tenure mix found in London*
Detached or semi-detached house or bungalow- 3 beds or fewer	40-45%	30-35%	15-20%
Detached or semi-detached house or bungalow- 4 beds or more	10-15%	10-15%	5-10%
Terraced house or bungalow- 2 beds or fewer	15-20%	15-20%	5-10%
Terraced house or bungalow- 3 beds or more	10-15%	10-15%	15-20%
Flat maisonette or apartment- 1 bed	5-10%	10-15%	15-20%
Flat maisonette or apartment- 2 beds or more	5-10%	10-15%	25-30%

Sources: Census Commissioned Tables C1398 (2001), CT0345 (2011), CT0770 (2011); MHCLG Household Projections (2014-based); GMCA modelling

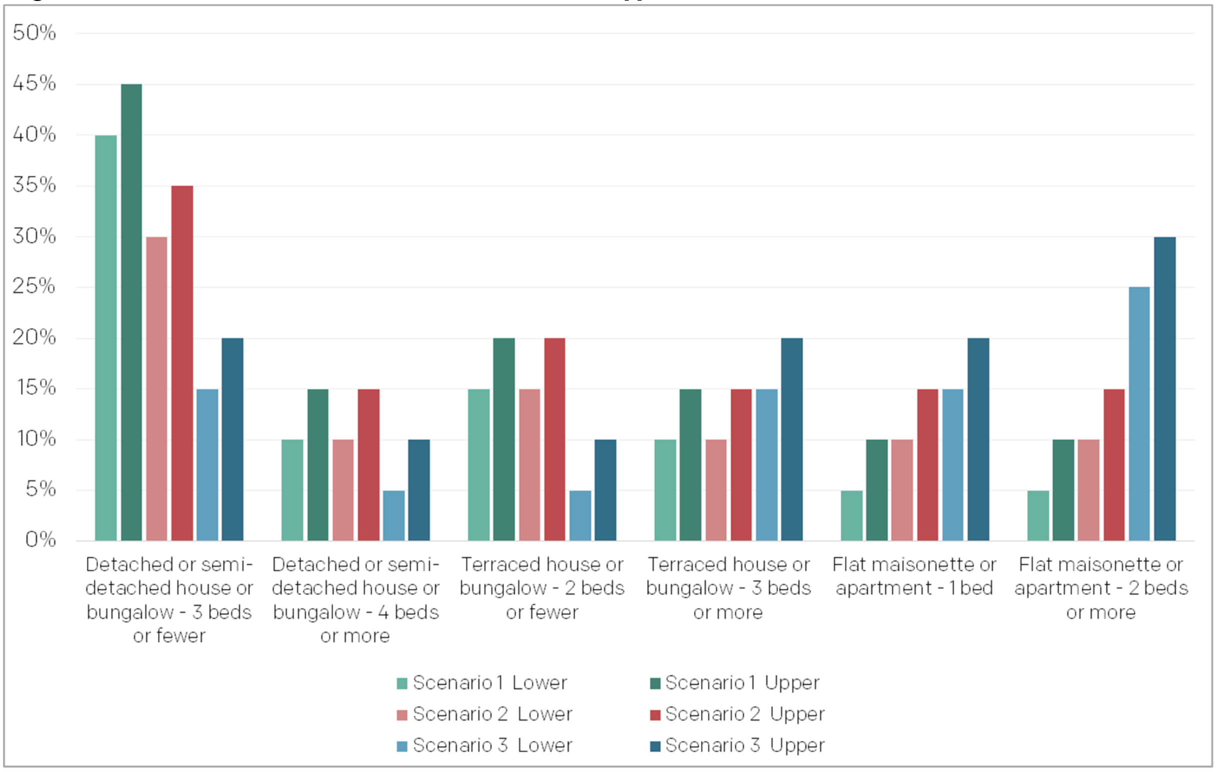
Table 4.9: Indicative tenure mix for Greater Manchester

	Scenario 1 ***2011 size and type and tenure mix***	**Scenario 2** ***2001-2011 trends continue***	**Scenario 3** ***2011 size and type and tenure mix found in London***
Owner-occupied	60-65%	55-60%	50-55%
Rented	35-40%	40-45%	45-50%

Sources: Census Commissioned Tables C1398 (2001), CT0345 (2011), CT0770 (2011); MHCLG Household Projections (2014-based); GMCA modelling

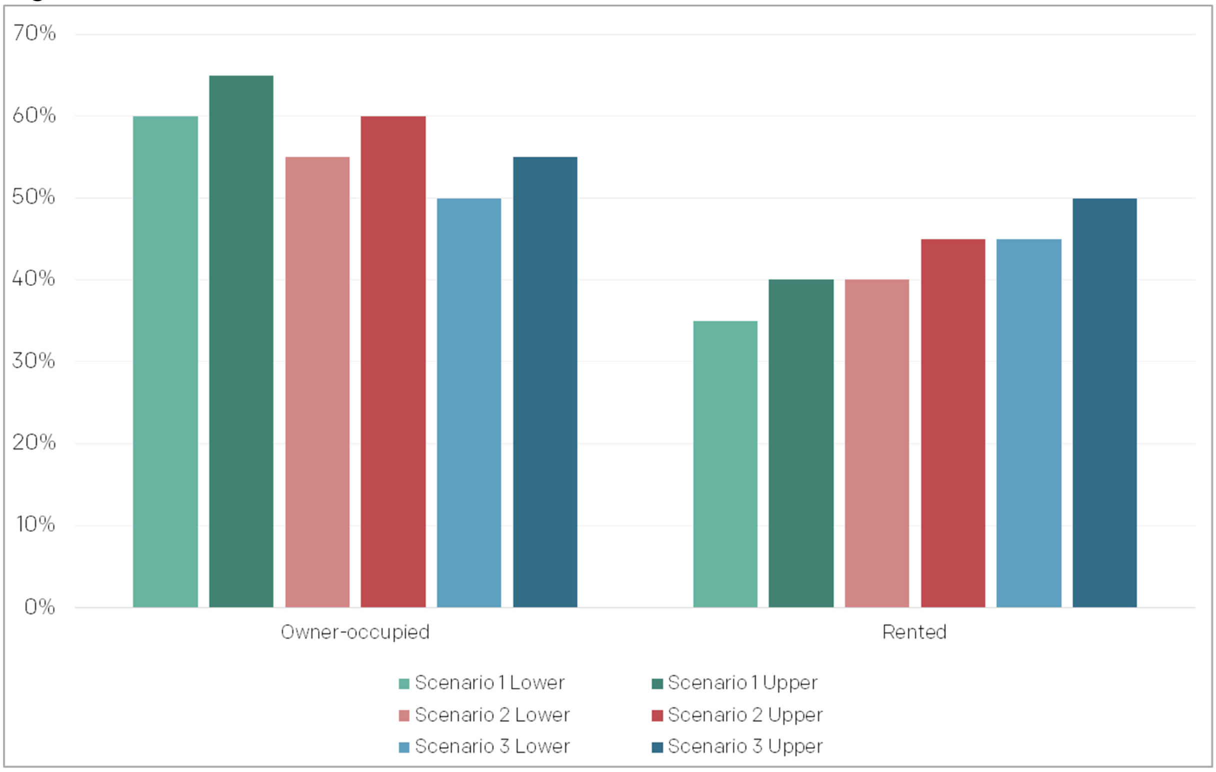
4.133 The following charts illustrate the upper and lower proportions for each of the scenarios, and the difference in housing type and size mix between the scenarios.

Figure 4.41: Indicative new accommodation type and size mix for Greater Manchester



(Scenario 1: 2011 size and type and tenure mix; Scenario 2: 2001-2011 trends continue; Scenario 3: 2011 size and type and tenure mix found in London)

Figure 4.42: Indicative tenure mix for Greater Manchester



(Scenario 1: 2011 size and type and tenure mix; Scenario 2: 2001-2011 trends continue; Scenario 3: 2011 size and type and tenure mix found in London)

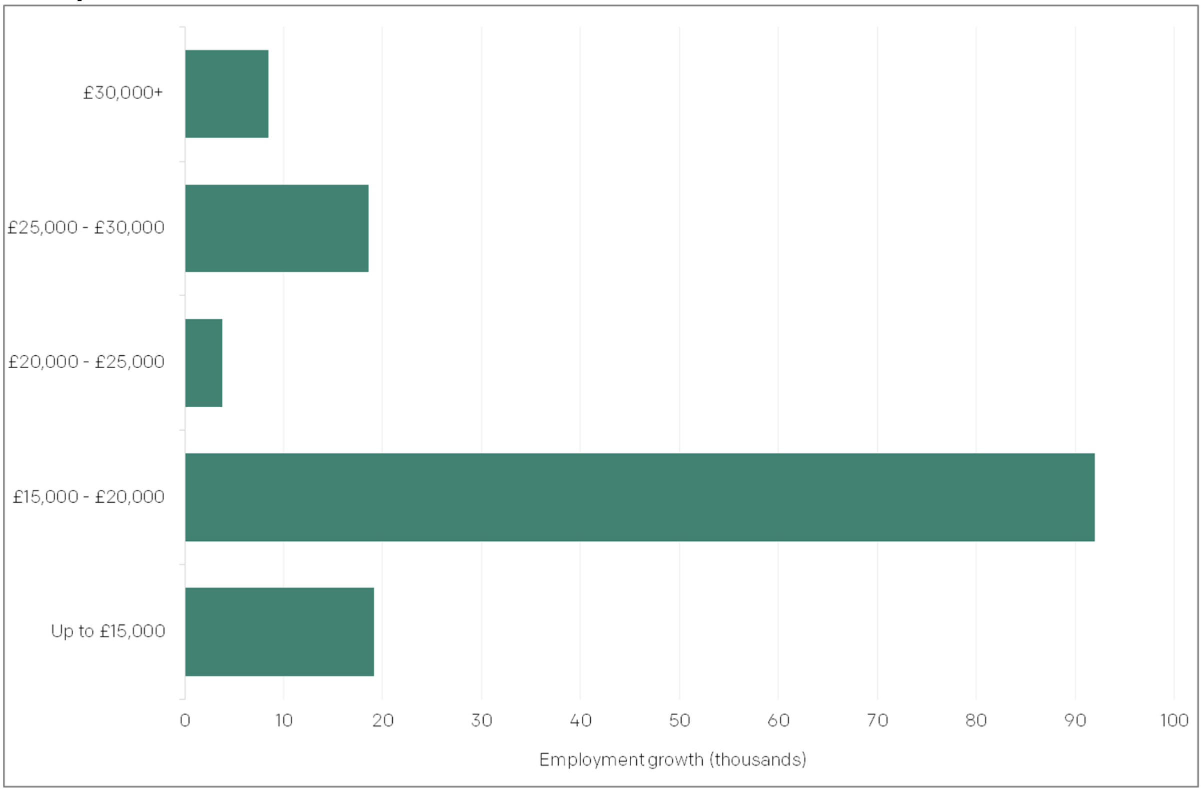
4.134 The percentage ranges and averages outlined above are indicative of the possible mix of new housing of different types, sizes and tenure in Greater Manchester.

Value of new housing

4.135 In order to understand the mix of housing values needed in Greater Manchester over the next 20 years, analysis of the projected future workforce has been conducted to identify the likely salary profile of the population.

4.136 Using data outlined in the Industry of Employment section of this report, projected employment growth has been analysed alongside current North West wage data to understand growth in salary bands.

Figure 4.43: Greater Manchester projected employment growth by median North West salary, 2015-2035

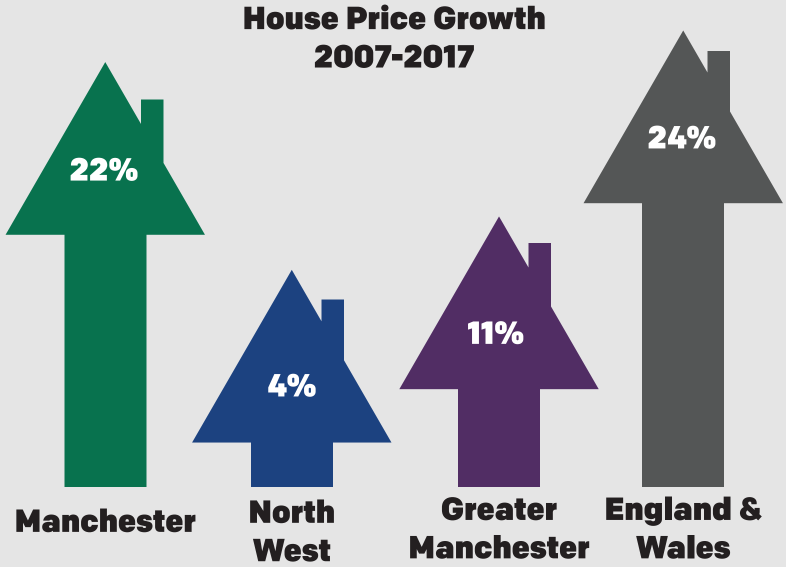


Source: GMFM 2017 and ASHE 2017

4.137 Figure 4.43 shows that the majority of employment growth in Greater Manchester over the period to 2035 will be in sectors with a median salary of up to £20,000, with around 20,000 more employees earning up to £15,000 and over 90,000 more employees earning up to £20,000. This is below the median North West salary of £22,000; around another 4,000 employees are projected to be earning £20,000-£25,000.

5 | Market Signals

House Price Growth 2007-2017

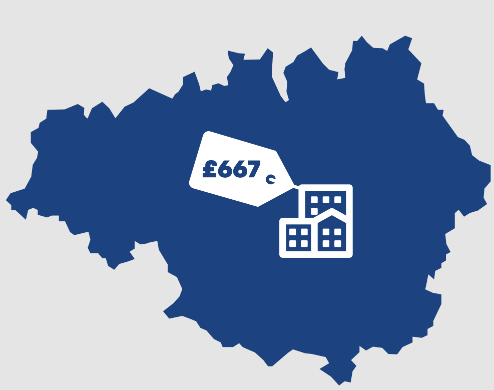


Long-term empty homes

In 2006, 2.6 in every hundred homes were empty for six months or more

By 2017 this had reduced to 0.9 in every hundred

Mean monthly rent



Greater Manchester

England

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?

- House prices in Greater Manchester as a whole have, historically, been substantially below national averages. In the ten years to September 2017 that gap widened, with our average price paid rising by 11% to £158,000, compared to a 24% increase to £233,000 in England and Wales as a whole.
- 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.
- In Greater Manchester the cost of a lower quartile home is around 5.2 times income. Those renting at the lower quartile in Greater Manchester are likely to be paying more than 30% of their monthly income in rent, but the median rent to income is more affordable.
- Our private rents are also lower than national averages – the median monthly rent in 2017/18 was £595 in Greater Manchester and £675 in England as a whole, though the gap may be narrower at the lower end of the market.
- 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, while rents in Manchester are also higher, reflecting the city centre market. In all districts, variations between neighbourhoods are of course substantial.
- One in five homes in Greater Manchester 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.
- Around 85,000 households were on local authorities' housing registers in 2016/17, of which almost 25,000 were in 'reasonable preference', meaning they have a priority need for a home.
- New housebuilding continues to slowly recover from the post-2008 collapse in delivery, with the 2017/18 total of around 9,000 net additional homes being the highest since 2007/08, driven by new developments in the central areas of Salford and Manchester.
- 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 additional homes and has helped to take the place of some of the shortfall in new build development in the last few years.

5.1 Introduction

5.1 This chapter examines the operation of the housing market in Greater Manchester and identifies market signals which provide evidence of housing requirements. It firstly examines house prices and land values across Greater Manchester, followed by a review of the private rented sector (PRS). This is followed by information on rental affordability and allocations in the social and affordable rented sector, and an analysis of the intermediate sector (such as rent to buy and shared ownership products). This evidence is then 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 Local Housing Need 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

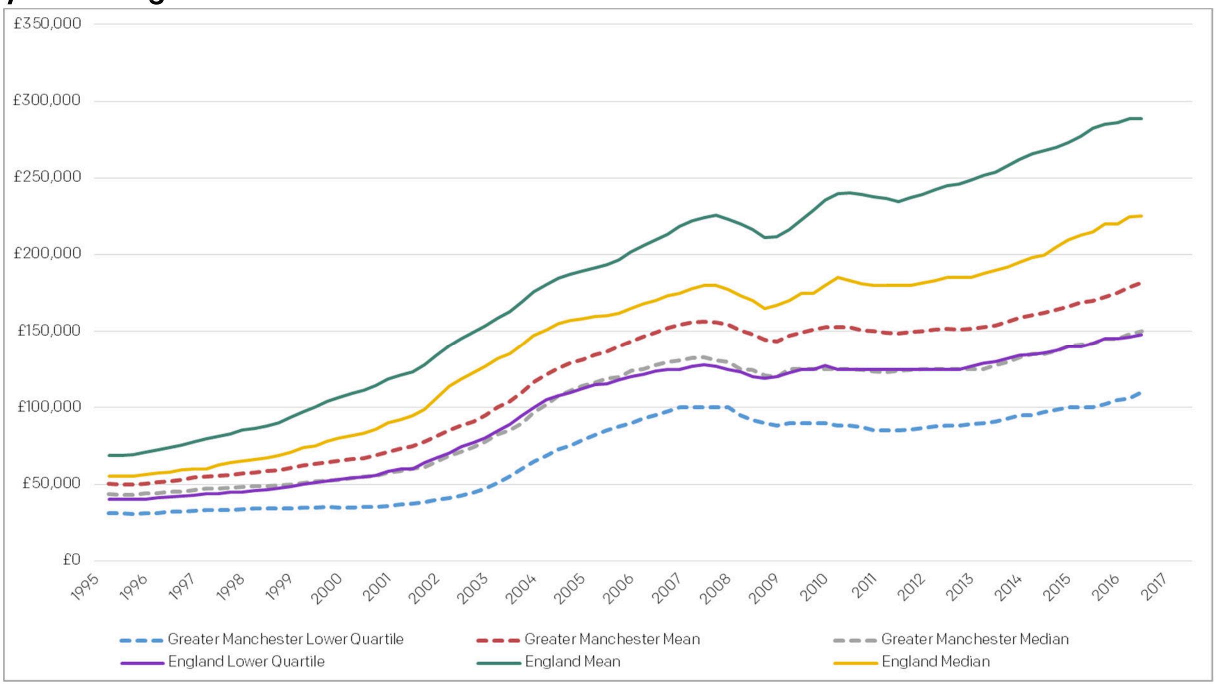
Long term trends

5.6 The ONS produce a House Price Statistics for Small Areas (HPSSAs)[39] measure which provides lower quartile, mean and median house prices. Figure 5.1 shows this data in Greater Manchester between December 1995 and March 2017.

5.7 Using this measure, mean house prices in Greater Manchester increased steadily until March 2009, when they dipped before levelling out in the proceeding three years. Mean house prices returned to growth from September 2012 onwards.

5.8 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.

Figure 5.1: Average house prices in Greater Manchester, year ending December 1995 to year ending March 2017

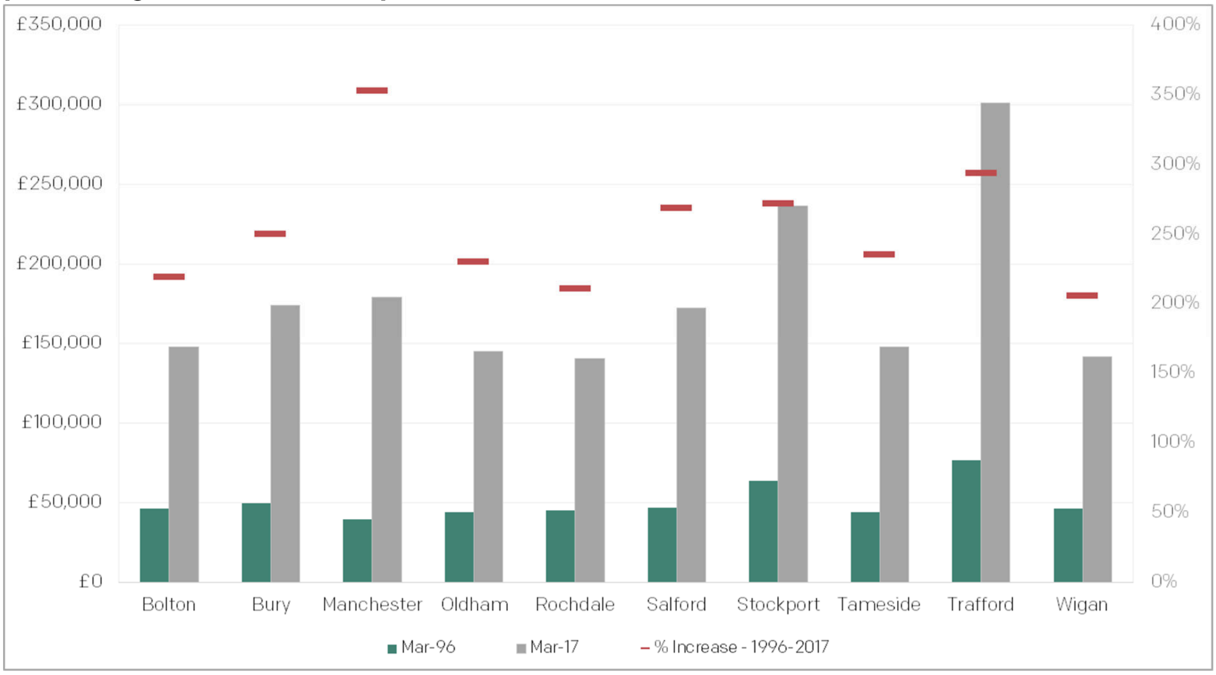


Source: ONS House Price Statistics for Small Areas (HPSSAs), Dataset 9: Median price paid, Dataset 12: Mean price paid and Dataset 15: Lower Quartile price paid

[39] 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 and Wales. Properties sold at a discount to market level, such as properties sold under the Right to Buy scheme, are excluded from the data.

5.9 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 ending March 1996 - the earliest available data.

Figure 5.2: Mean house prices in Greater Manchester districts 1996 and 2017and percentage increase in the period



Source: H M Land Registry

5.10 In 1996, the mean property price in Manchester was clearly the lowest in Greater Manchester. Property prices have risen the most in Manchester in percentage terms and Manchester is now the third most expensive area in Greater Manchester. Rochdale now has the lowest mean house prices across the conurbation. Despite having the lowest percentage rise over the period, the mean price in Wigan is now over three times the value it was in 1996.

5.11 There has been a geographical element to house price inflation with districts to the north experiencing rates lower than those 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.

5.12 Table 5.1 below compares the annual growth rate in house prices in Greater Manchester and its ten constituent districts over the period 1996 to 2017; 2008 to 2017 and also overall. Regional and national comparisons are also provided.

Table 5.1: Average percentage per annum growth in house prices, year ending March 1996 to year ending March 2017

Area	March 1996 to March 2008	March 2008 to March 2017	March 1996 to March 2017
Bolton	10.2%	0.5%	5.7%
Bury	11.0%	1.6%	6.2%
Manchester	13.4%	1.6%	7.5%
Oldham	10.5%	1.1%	5.9%
Rochdale	9.9%	0.6%	5.6%
Salford	11.5%	2.0%	6.4%
Stockport	11.6%	2.0%	6.5%
Tameside	10.6%	0.6%	5.9%
Trafford	12.1%	2.2%	6.7%
Wigan	9.8%	0.7%	5.5%
Greater Manchester	11.4%	1.7%	6.4%
North West	10.9%	1.4%	6.1%
England and Wales	12.6%	2.8%	7.0%

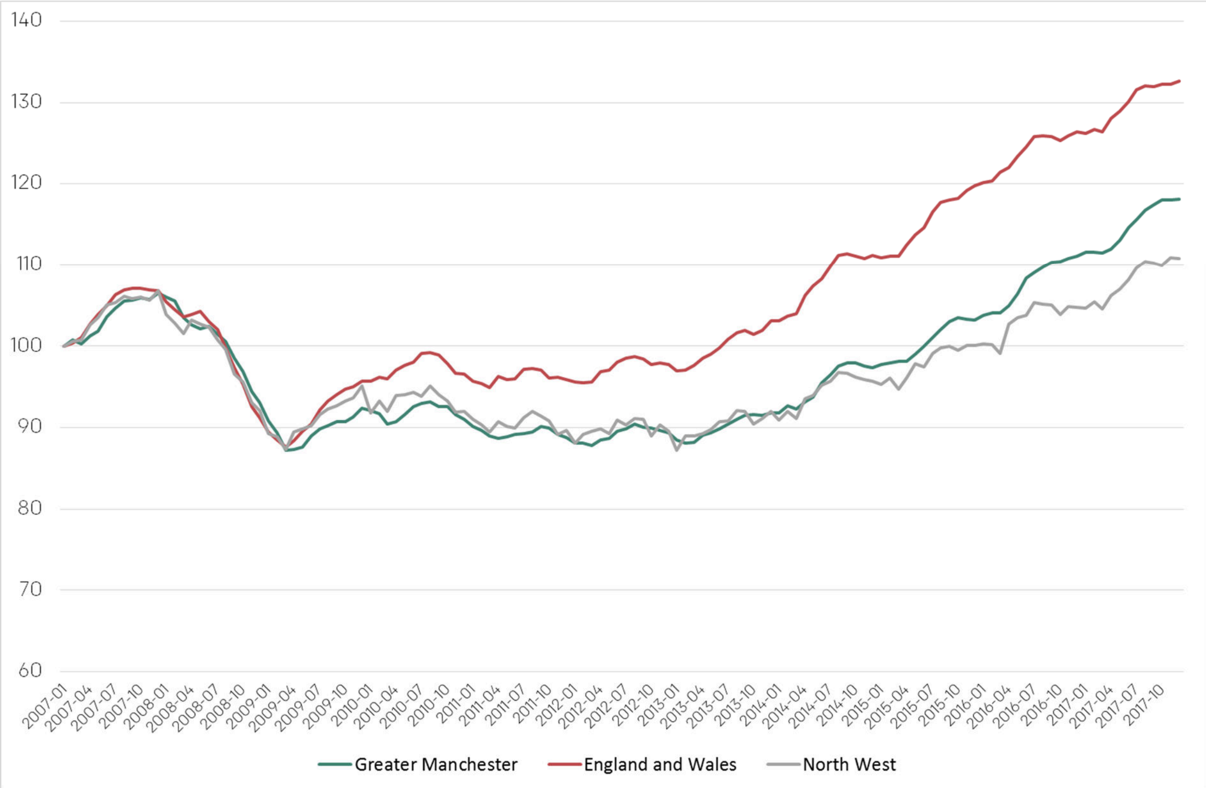
Source: H M Land Registry

5.13 The long-term annual house price growth rate for Greater Manchester (March 1995 to March 2017) is 6.4% per annum which is slightly above the rate for the North West region (6.1%) but below the annual rate for England and Wales (7.0%). There was strong house price growth in the period March 1995 to March 2008, with Greater Manchester experiencing growth of 11.4% per annum which was only slightly below the national average (12.6%) for the period but above the North West average (10.9%). Within Greater Manchester, growth was consistently above 9% per annum across the districts. Manchester had the highest pre-recession rate at 13.4%.

5.14 In comparison, house price growth rates for the period 2008 to 2017 are significantly different. Bolton, Rochdale, Tameside and Wigan all had annual rates below 1%. Salford, Stockport and Trafford recovered at the fastest rate, although remain below the national average. Over the full period shown, only Manchester had a rate above that for England and Wales.

Changes in house prices

Figure 5.3: Change in residential house prices paid, January 2007-December 2017 (Index, January 2007 = 100)



Source: H M Land Registry House Price Paid Data

5.15 The chart above illustrates change in house prices over the period 2007 to 2017, indexed to January 2007, and shows that Greater Manchester has broadly followed regional and national trends. Prices in Greater Manchester decreased significantly in 2008/09, when the financial crisis began to have an impact on the housing market, and were slow to recover. Sustained growth in house prices began in mid-2013, with levels in Greater Manchester surpassing those of 2007 in mid-2016. Since 2014, growth in Greater Manchester has outstripped that of the North West, however national house prices have recovered to a greater extent than in Greater Manchester and the North West.

5.16 Table 5.2 shows that across Greater Manchester, house prices have increased by 11.0% since 2007, which is less than half of the rate of growth seen across England and Wales (24.3%). However, it is significantly higher than the rate of house price growth seen in the North West as a whole (4.0%). Trafford has experienced the highest level of growth at almost 35.2%

over the decade, while Manchester and Stockport have experienced growth of 22.2% and 17.9% respectively. Rochdale saw prices decline by 3.7% over the period, with declines also seen in Wigan and Bolton.

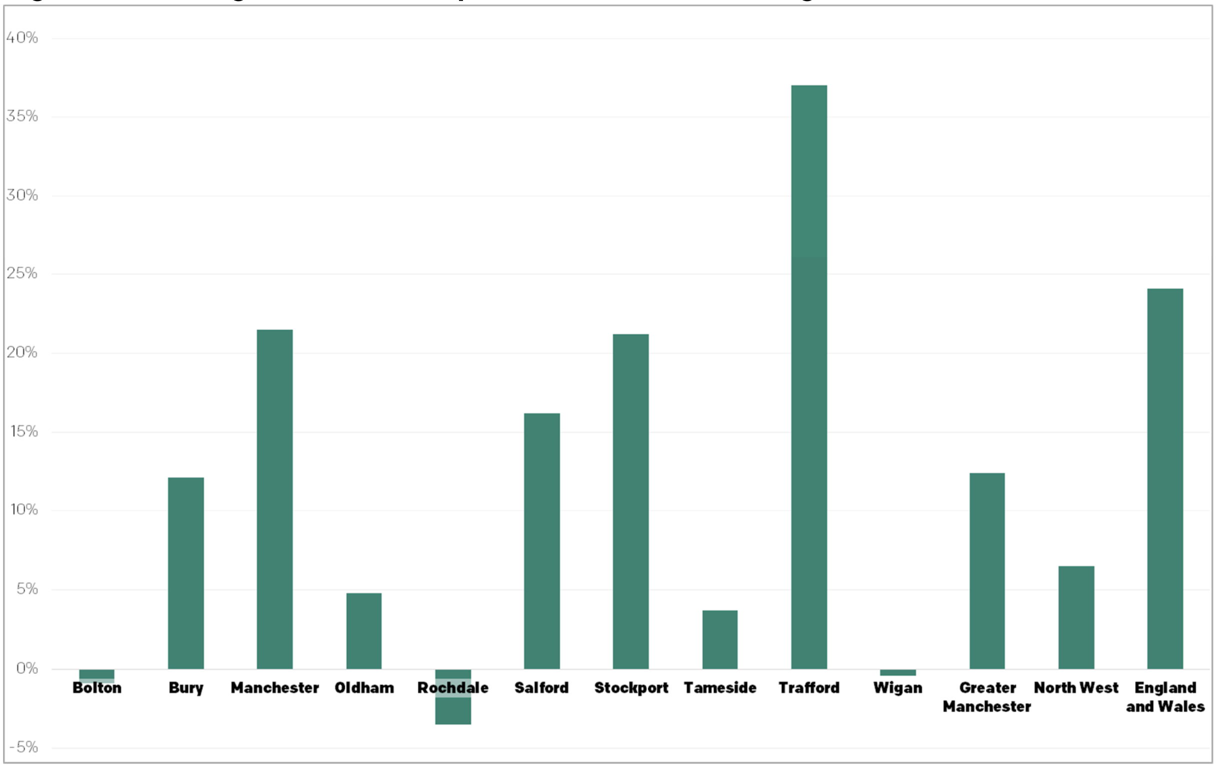
Table 5.2: Change in residential prices, 2007-2017 (average of 12 months)

Area	Average price paid 2007	Average price paid 2017	% Change
Bolton	£130,514	£126,735	-2.9%
Bury	£148,229	£160,690	8.4%
Manchester	£135,012	£164,997	22.2%
Oldham	£124,251	£124,979	0.6%
Rochdale	£129,737	£124,917	-3.7%
Salford	£131,513	£152,312	15.8%
Stockport	£176,298	£207,785	17.9%
Tameside	£132,043	£135,974	3.0%
Trafford	£195,326	£264,114	35.2%
Wigan	£127,781	£126,979	-0.6%
Greater Manchester	£142,693	£158,369	11.0%
North West	£148,504	£154,412	4.0%
England and Wales	£187,622	£233,245	24.3%

Source: H M Land Registry House Price Paid Data

5.17 The chart below (Figure 5.4) represents the percentage change between 2007 and 2017. It highlights clearly that of the Greater Manchester districts, only Trafford has experienced growth in house prices over the decade higher than that nationally.

Figure 5.4: Change in residential prices, 2007-2017 (average of 12 months)



Source: H M Land Registry House Price Paid Data

5.18 The table below shows the average prices by property type in 2017. Trafford is the most expensive Greater Manchester district across all categories. Rochdale is the least expensive for all categories, terraced, flats and existing properties. Wigan is the least expensive for detached and semi-detached, and Bolton has the lowest values for new build properties at £155,600.

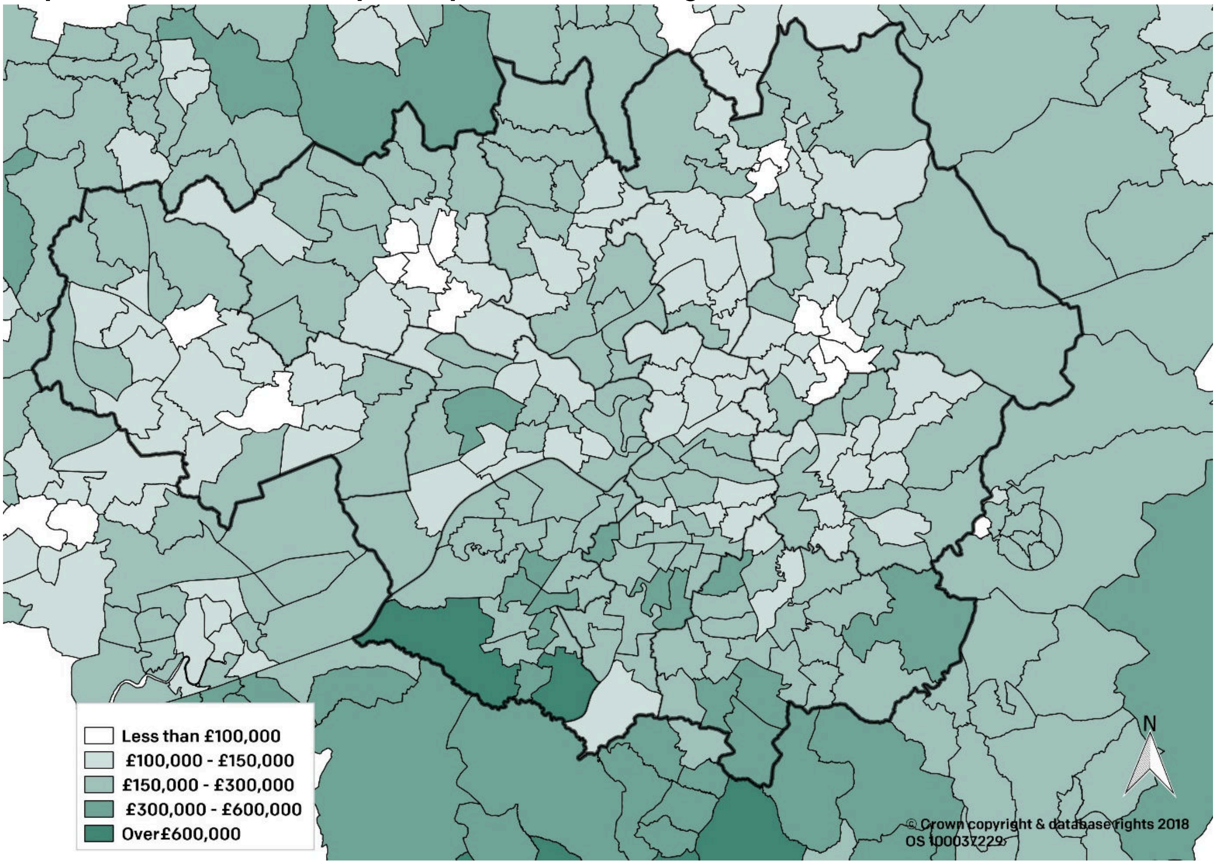
Table 5.3: Average prices by type, 2017 (average of 12 months)

Area	All properties	Detached	Semi-detached	Terraced	Flat	New	Existing	All properties
Bolton	£126,700	£223,300	£133,800	£100,500	£86,000	£155,600	£126,000	£126,700
Bury	£160,700	£268,500	£172,000	£124,600	£96,900	£237,500	£157,000	£160,700
Manchester	£165,000	£290,700	£198,500	£151,300	£149,500	£190,000	£161,700	£165,000
Oldham	£125,000	£218,900	£139,200	£102,300	£94,100	£164,600	£122,800	£125,000
Rochdale	£124,900	£210,600	£130,600	£97,500	£73,600	£173,500	£120,200	£124,900
Salford	£152,300	£272,200	£177,400	£133,100	£126,200	£185,400	£148,000	£152,300
Stockport	£207,800	£352,500	£218,900	£158,200	£133,700	£221,100	£207,100	£207,800
Tameside	£136,000	£231,000	£147,600	£112,800	£95,000	£181,700	£132,400	£136,000
Trafford	£264,100	£477,900	£285,500	£219,600	£175,200	£261,300	£263,400	£264,100
Wigan	£127,000	£208,600	£127,100	£97,700	£74,900	£207,900	£123,628	£127,000
Greater Manchester	£158,400	£268,400	£173,700	£125,900	£132,700	£192,900	£155,900	£158,400
North West	£154,400	£266,400	£162,700	£117,500	£116,900	£209,500	£151,000	£154,400
England and Wales	£233,200	£350,000	£216,000	£186,800	£222,000	£293,700	£228,800	£233,200

Source: H M Land Registry House Price Paid Data

5.19 Map 5.1 shows the mean residential prices for all properties at ward level across Greater Manchester districts in 2017. Properties over £300,000 are predominantly to the south of Greater Manchester and neighbouring areas. Properties sold for less than £100,000 in 2017 are predominantly in the central areas of the districts in the north of Greater Manchester.

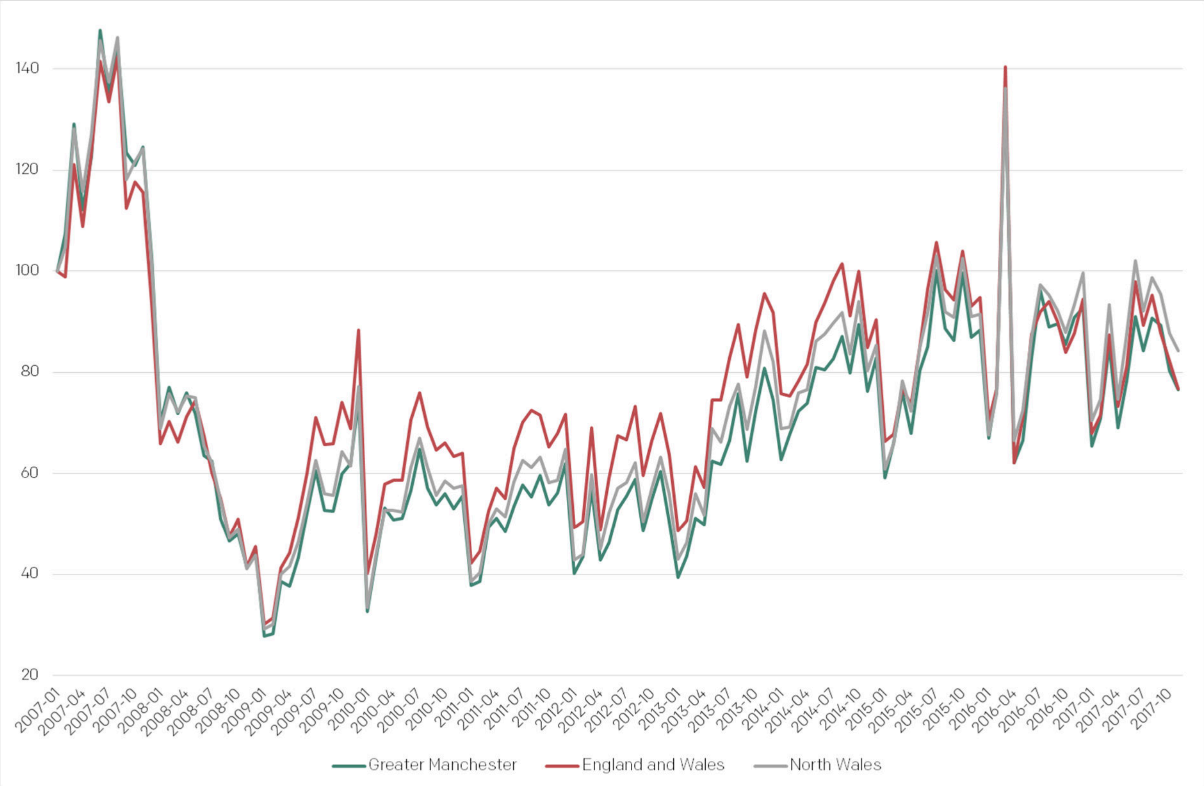
Map 5.1: Mean residential prices paid, 2017 (average of 12 months)



Source: H M Land Registry House Price Paid Data

Transactions

Figure 5.5: Housing transactions index (July 2007=100)

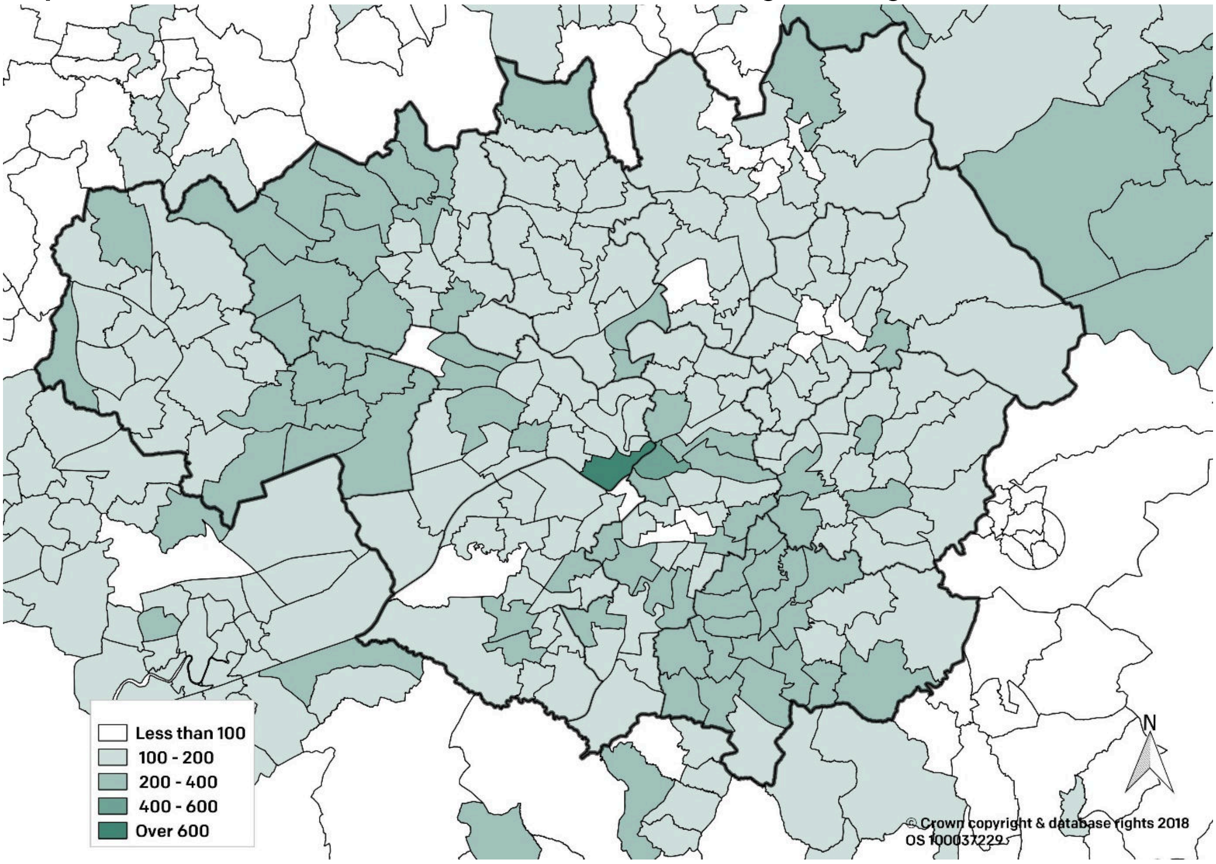


Source: ONS/H M Land Registry House Price Paid Data

5.20 Figure 5.5 details residential property sales since January 2007 and indexed to this date for Greater Manchester, England and Wales and the North West. The Index peaked for all areas in August 2007 and has not reached this level since, even when there was a stamp duty change in January 2016. All areas had their lowest sales point in January 2009 when the economy was at the deepest point of the recession. In that month sales were only a fifth in number compared to the peak month of August 2007.

5.21 The most recent sales figures show that the market, in terms of actual number of sales, is still only about 60% of the base figures in August 2007. In Greater Manchester, almost 5,600 sales were recorded in August 2007 compared with just over 3,100 sales in August 2017. For most months, both Greater Manchester and the North West had lower Index values than England and Wales albeit relative to the figures of July 2007. In general the chart shows that market activity is still to recover. There could be a number of factors involved in this trend such as job insecurity, fewer properties to choose from, mortgage availability and the types of property being sold and built. Rates pre-recession may also play a role, with credit generally being easier to obtain at the time.

Map 5.2: Residential sales, Greater Manchester and neighbouring wards, 2017



Source: H M Land Registry Price Paid Data, 2017

5.22 In terms of sales over the calendar year of 2017, Map 5.2 shows that the regional centre had significantly the highest number of sales over the year. There are a number of neighbouring wards that have had less than 100 sales during 2017 whilst there has been significant sales activity to the north east of Greater Manchester and to the south west.

5.3 Land values

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

5.24 The table below outlines the values recorded in January 2014 and March 2015 for the ten Greater Manchester districts, compared with the weighted averages for England, both including and excluding London.

Table 5.4: Residential Land Values (per Hectare), 2014 and 2015

Area	1 January 2014	1 March 2015	% change
Bolton	£1,905,000	£1,775,000	-6.8%
Bury	£1,465,000	£1,265,000	-13.7%
Manchester	£1,790,000	£1,635,000	-8.7%
Oldham	£1,253,000	£1,140,000	-9.0%
Rochdale	£1,017,000	£1,055,000	3.7%
Salford	£938,000	£975,000	3.9%
Stockport	£1,745,000	£2,085,000	19.5%
Tameside	£1,385,000	£1,450,000	4.7%
Trafford	£1,920,000	£1,900,000	-1.0%
Wigan	£1,355,000	£1,295,000	-4.4%
England (including London)	£6,017,000	£6,900,000	14.7%
England (excluding London)	£1,958,000	£2,100,000	7.3%

Source: MHCLG Land Value estimates for Policy Appraisal (February 2015 and December 2015)

5.25 Using this measure, land values in Greater Manchester are relatively low compared to the national average, with no district exceeding the national figure even when London is excluded. There is quite considerable variation across Greater Manchester with Salford and Rochdale having the lowest values at around half of the England (excluding London) average. Stockport, Trafford, Bolton and Manchester have the highest values, but are still below the national average.

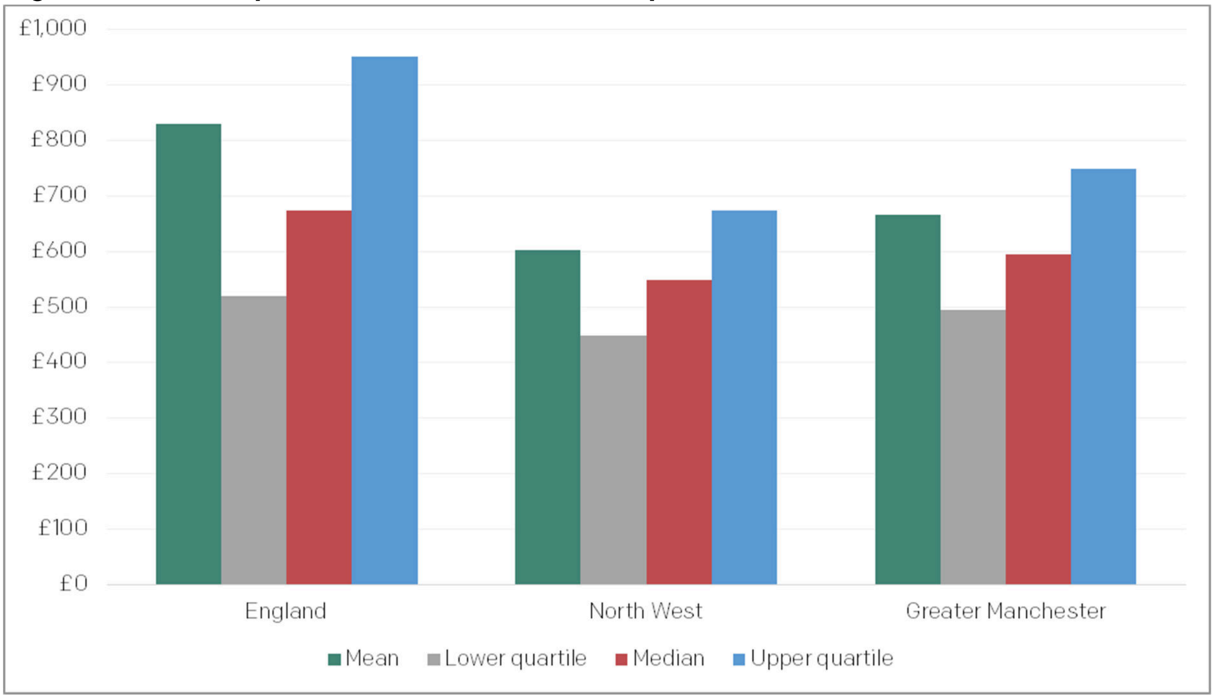
5.26 The MHCLG advises that the figures are appropriate for a single, hypothetical site and should not be taken as appropriate for all sites in the locality.[40] However, it is notable that six of the Greater Manchester districts saw a reduction in the estimated value and only Stockport exceeded the national increase (including or excluding London).

[40] Department for Communities and Local Government (December 2015) *Land value estimates for policy appraisal*, p.15.

5.4 Rental trends

5.27 In 2017/18, 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 £595 in Greater Manchester, compared to £550 in the North West and £675 for England. Lower quartile private rents were £495 in Greater Manchester, which is higher than that of the North West but lower than in England as a whole (£520).

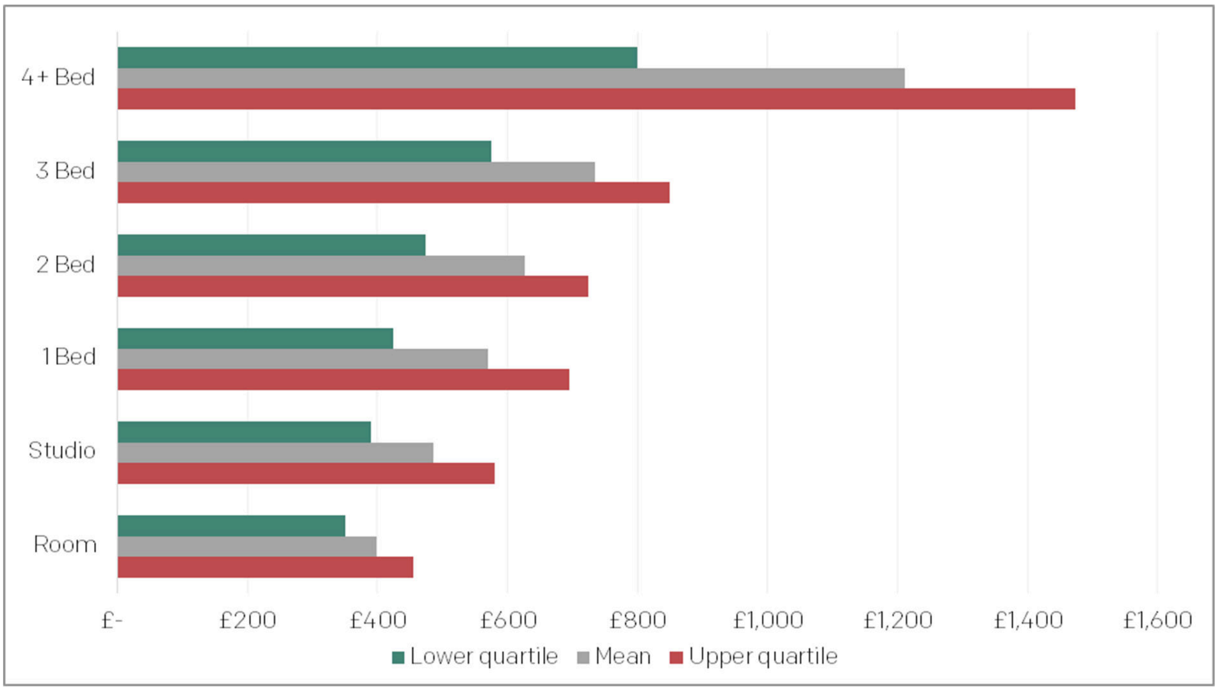
Figure 5.6: Monthly rents recorded between 1 April 2017 and 31 March 2018



Source: Valuation Office Agency Private Rental Market Statistics

5.28 Figure 5.7 outlines rental costs for different sizes of property in Greater Manchester, based on transactions recorded by the Valuation Office Agency (VOA) for 2017/18. Monthly rental costs for most homes vary between £425 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 £734 per calendar month. For the room measure, monthly rental costs range from £455 at upper quartile rents to £350 at lower quartile rents. The mean room rent is £398 per calendar month.

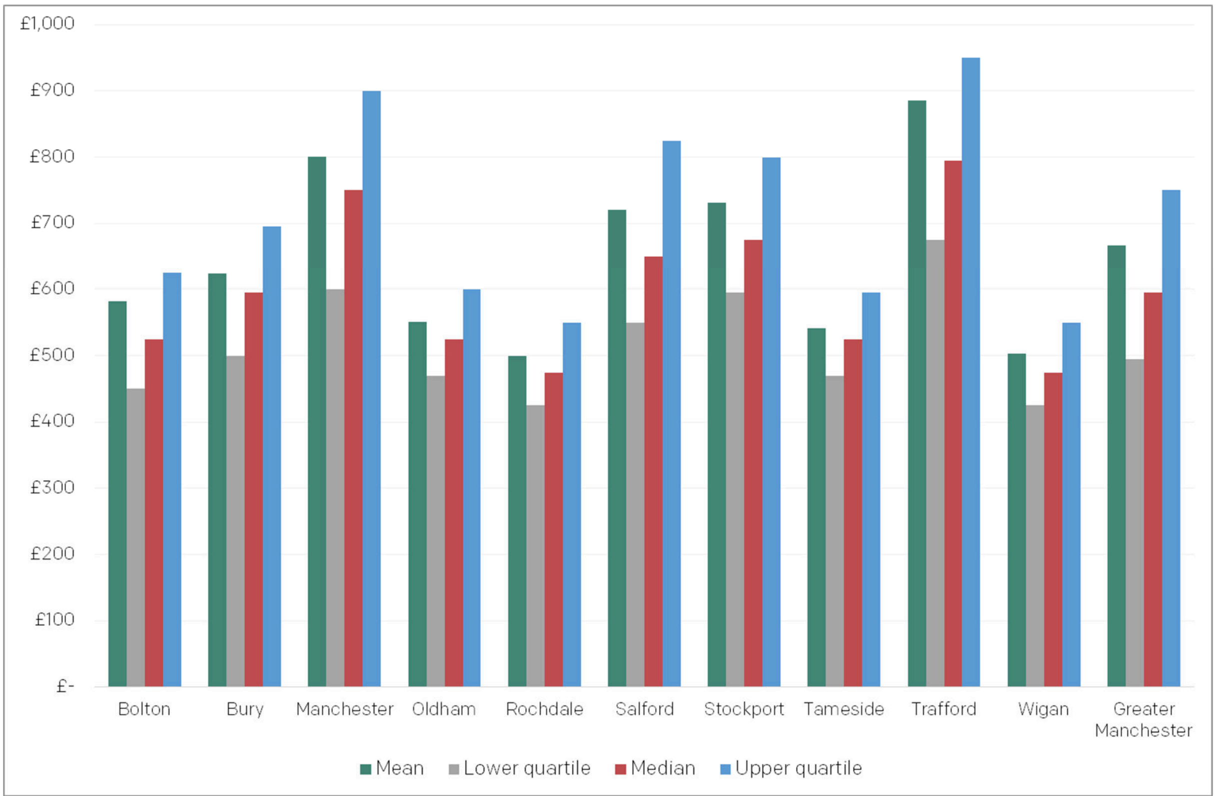
Figure 5.7: Monthly rents by property size recorded between 1 April 2017 and 31 March 2018



Source: Valuation Office Agency Private Rental Market Statistics

5.29 As shown in Figure 5.8 below, Trafford has the highest monthly rents across Greater Manchester, with a median monthly rent of £795 compared with £475 in Rochdale. Manchester and Stockport generally have the next highest rent averages whereas rents in Bolton, Oldham, Wigan and Tameside are relatively low overall. This pattern is similar to that for house prices. Appendix 8.2 provides data from the VOA on average monthly rents for the period 1 April 2017 to 31 March 2018 across the Greater Manchester districts. Even at this level, however, the diversity of the PRS is not always fully reflected by the aggregate nature of the available data, both in terms of small-scale spatial differences in rent levels and the increasing emergence of new purpose-built professionally managed market rented units.

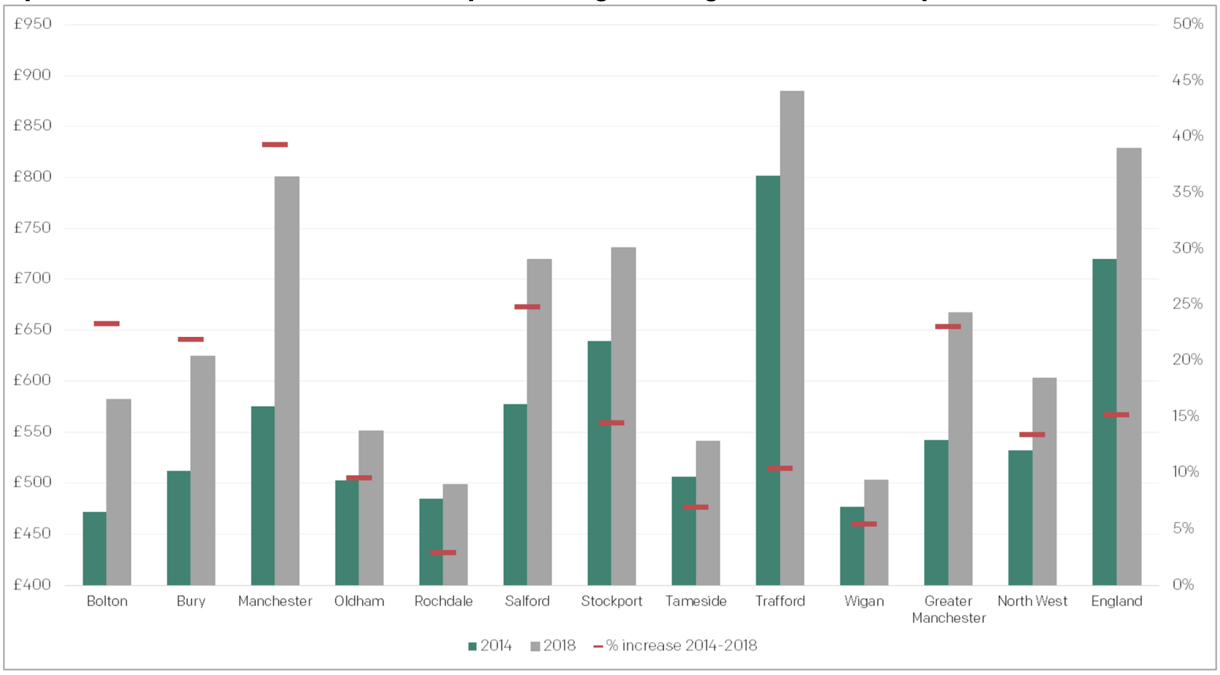
Figure 5.8: Monthly rents recorded between 1 April 2017 and 31 March 2018



Source: Valuation Office Agency Private Rental Market Statistics

5.30 Figure 5.9 shows average monthly rents observed in 2014 and 2018, as well as the percentage change in this period to provide an indication of rental change in recent years. Rental growth in Greater Manchester is shown to be below the national average but above the regional figure. 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.

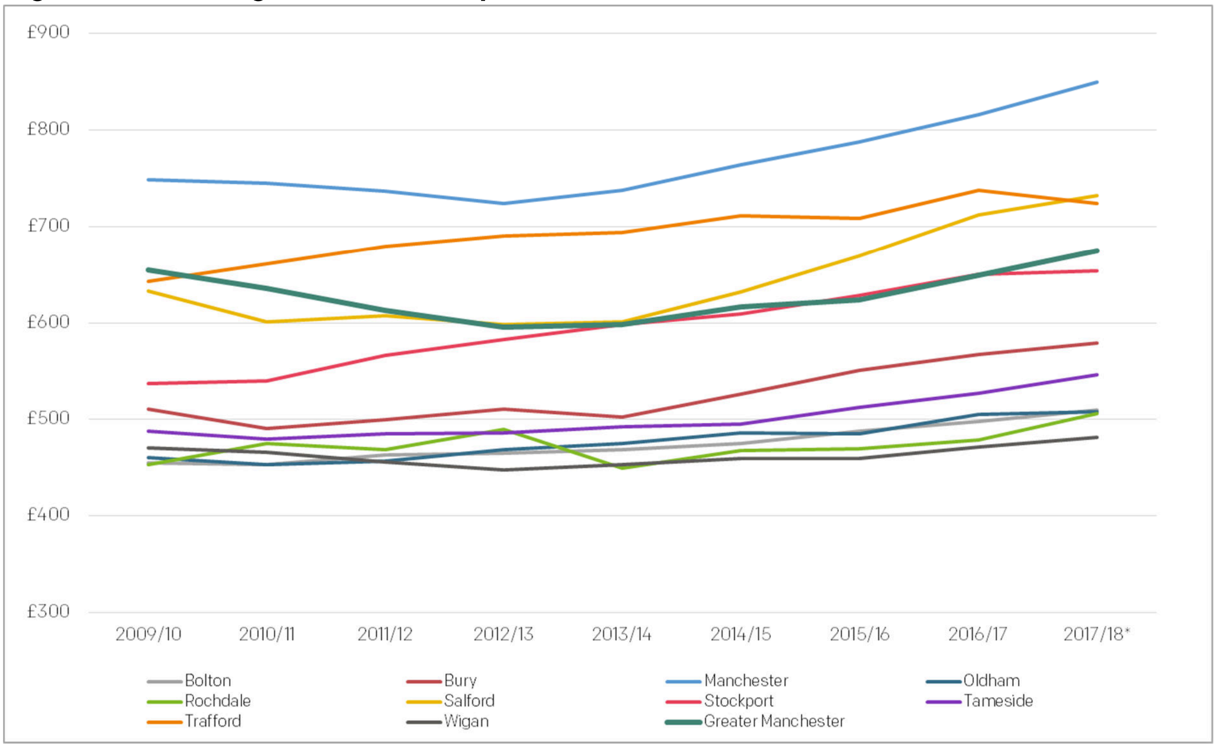
Figure 5.9: Mean monthly rents recorded between 1 April 2013 and 31 March 2014 and 1 April 2017 and 31 March 2018 and percentage change between the periods



Source: Valuation Office Agency Private Rental Market Statistics

5.31 Although not covering all properties for sale or rent (particularly properties at the bottom end of the market), Zoopla provides a supplementary source of rental data. Figure 5.10 shows Zoopla data for average 2-bed monthly advertised rents in Greater Manchester. Rents here are shown to be increasing steadily over the five year period to 2017/18 in Greater Manchester, to £675 for the year up to February - a 13.2% increase on 2012/13 levels. All districts across Greater Manchester have reported an increase in average 2-bed rent levels since 2012/13. Salford (22.4%) and Manchester (17.4%) recorded the greatest increase over the period, reflecting the strengthening and dominant regional centre apartment market.

Figure 5.10: Average 2-bed monthly rents 2009/10 to 2017/18



Source: Zoopla

**2017/18 figures include up to the end of February 2018*

5.32 The Index of Private Housing Rental Prices (IPHRP)[41] provides another source of rental data which measures the change in price of renting residential property from private landlords. This experimental data is indexed to January 2011 and is available at the regional level. Table 5.5 provides this data for January of each year and for October 2017 – the latest data available at the time of analysis.

[41] The IPHRP is constructed using administrative data, making use of data that are already collected for other purposes in order to estimate rental prices. The source of private rental prices for England is the Valuation Office Agency.

Table 5.5: Index of Private Housing Rental Prices*

Date	Region										
	North West	North East	Yorkshire and The Humber	East Midlands	West Midlands	East	London	South East	South West	England	England excl. London
Jan 2011	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Jan 2012	101.1	101.4	100.8	101.6	101.3	101.7	104.9	102.4	101.9	102.8	101.7
Jan 2013	101.8	101.8	102.0	102.9	102.6	103.4	109.6	104.6	103.6	105.5	103.2
Jan 2014	102.1	102.1	102.7	104.0	103.7	104.2	112.7	106.4	105.0	107.3	104.4
Jan 2015	102.7	102.4	103.1	105.3	105.0	106.1	115.8	108.7	106.7	109.4	105.8
Jan 2016	103.7	103.3	104.3	107.7	106.8	109.2	120.4	111.8	108.1	112.4	107.9
Jan 2017	105.0	104.2	105.9	110.7	109.1	112.5	122.8	115.5	111.1	115.0	110.7
Oct 2017	106.0	104.3	107.1	112.7	110.4	114.0	123.3	117.2	112.7	116.1	112.1

Source: ONS, Index of Private Housing Rental Prices (IPHRP)
**Index level (January 2011 = 100)*

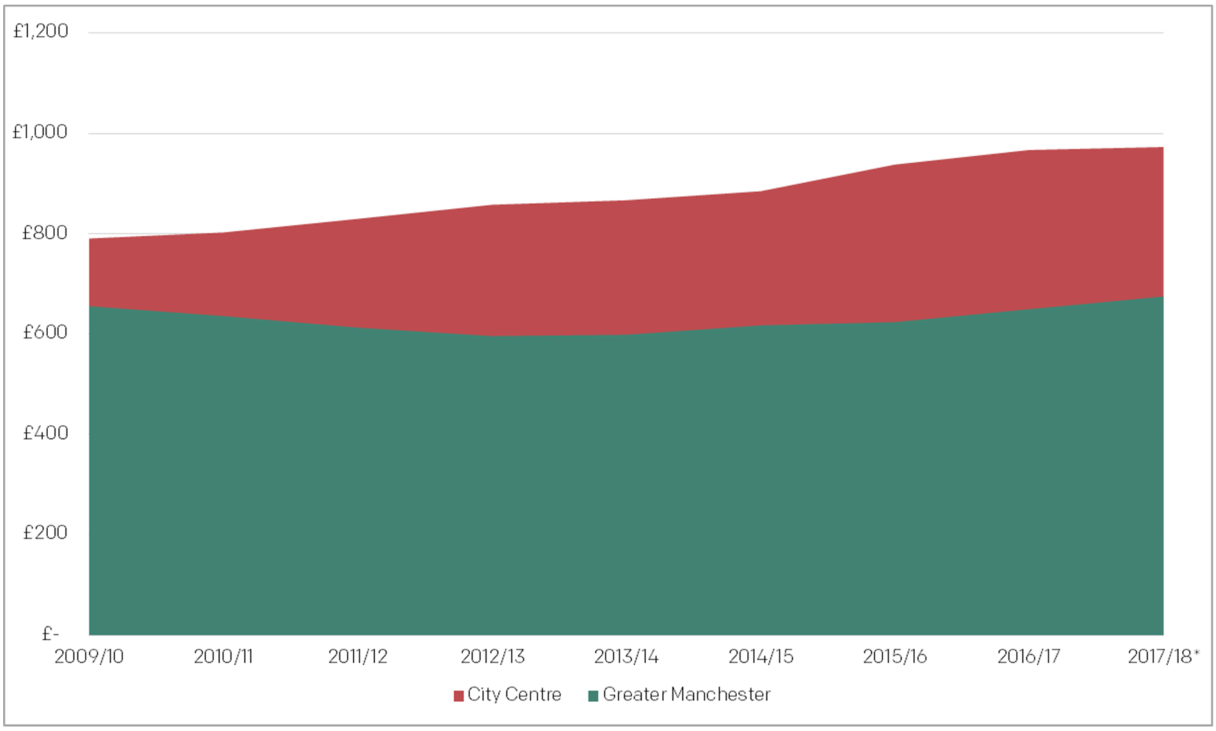
5.33 The North West region has seen the second lowest inflation in private rents since January 2011, although this could clearly mask significant differences across the region. Rental increases have been the highest in the south of the country.

City centre rental market

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

5.35 Zoopla data shows rents in the city centre have been increasing steadily since 2011/12, with a 16.7% change in rents over the last five years (Figure 5.11). This is higher than rate observed across Greater Manchester, which was 13.2% for the same period.

Figure 5.11: Average 2-bed monthly rents in Greater Manchester and the city centre 2009/10 to 2017/18



Source: Zoopla

**2017-18 figures include up to the end of February 2018*

5.5 Households in need and affordability

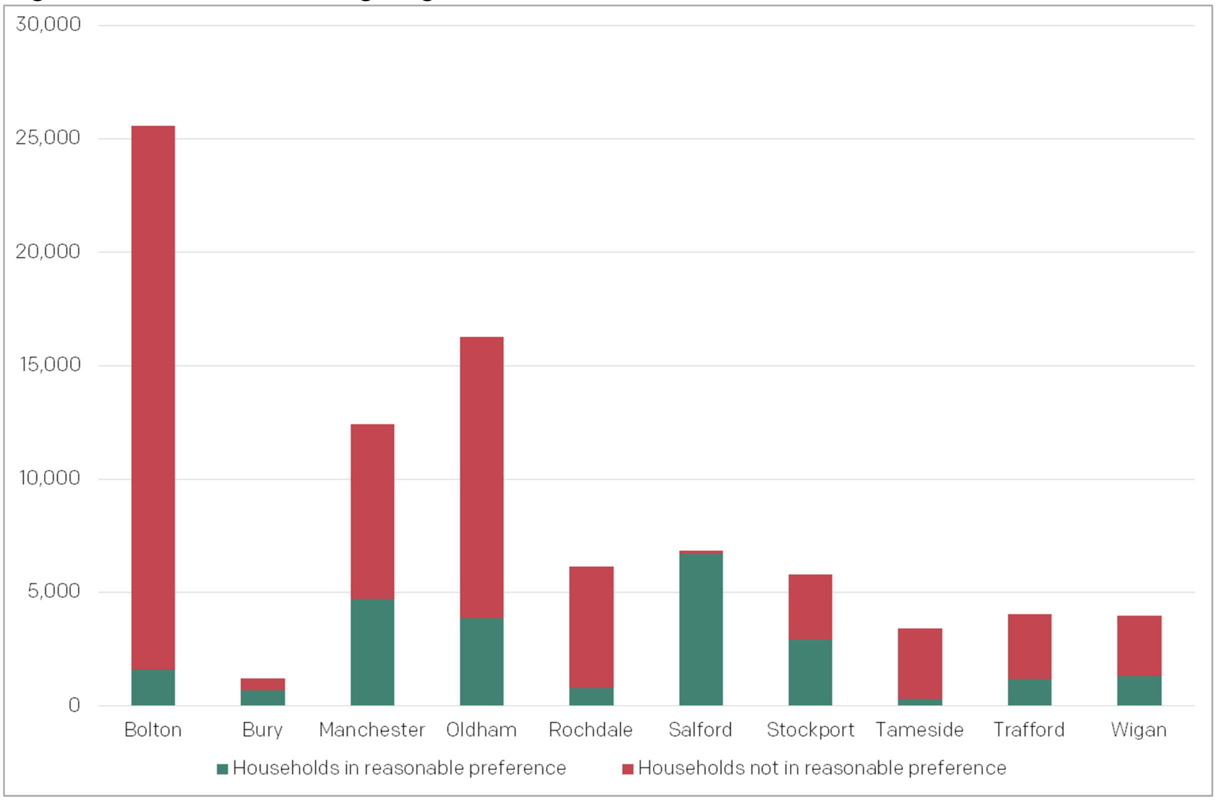
Households in need

Housing Registers

5.36 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.

5.37 Figure 5.12 displays the housing registers for each local authority in Greater Manchester.

Figure 5.12: Social Housing Registers in Greater Manchester, 2016/17

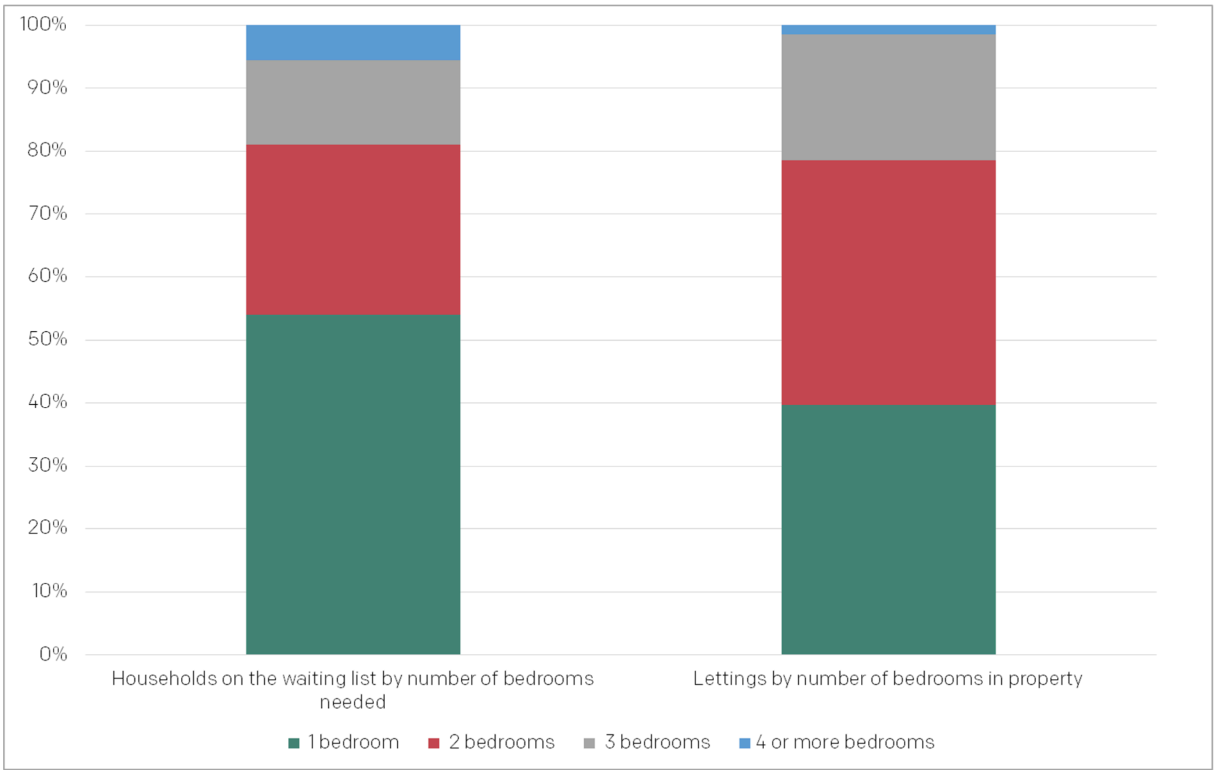


Source: Local Authority Housing Statistics dataset, England 2016-17: Section C – Allocations

5.38 In Greater Manchester there were over 85,000 households on the housing register in 2016/17, around 7% of households. Of these households, over 24,000 (28%) were in reasonable preference, meaning they were identified by the local authority as being in housing need.[42] The chart suggests that in all districts other than Bury and Salford there are more households not in reasonable preference than those that are.

[42] See Chapter 4.3 Homelessness for definitions of homeless decisions.

Figure 5.13: Households on the housing register and local authority lettings by number of bedrooms, 2016/17*



Source: Local Authority Housing Statistics dataset, England 2016-17: Section C – Allocations and MHCLG Social Lettings Local Authority Live Tables 2016/17

**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. See appendix [8.2 Market signals appendices](#) for more information*

5.39 Figure 5.13 compares local authority lettings data with housing register data. In Greater Manchester, over half of those on the registers are in need of a one bedroomed home (52%), with a further 29% requiring a 2 bedroomed home. However only 40% of lets were to those in one bedroomed homes in 2015/16, with 39% of lets to those in 2 bedroomed homes and 20% to those needing three bedroomed homes.

Affordability

Defining affordability

5.40 The Institute for Public Policy Research (IPPR) looked at definitions of affordability in their 2017 report on the affordability crisis in London.[43] 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.*[44]

5.41 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 has devised the Minimum Income Standard to determine the necessary income needed to maintain an adequate standard of living.[45]
- 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.

5.42 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)

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[43] IPPR (2017), *Priced Out? The affordability crisis in London*. Available at: https://www.ippr.org/research/publications/priced-out

[44] Bibby (2015), *What is 'affordable housing'?* Shelter. Available at: http://blog.shelter.org.uk/2015/08/what-is-affordable-housing/

[45] 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: http://www.lboro.ac.uk/research/crsp/mis/whatismis/

5.43 The definition of affordable housing used by Government and set out in the NPPF[46] is as follows:

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.

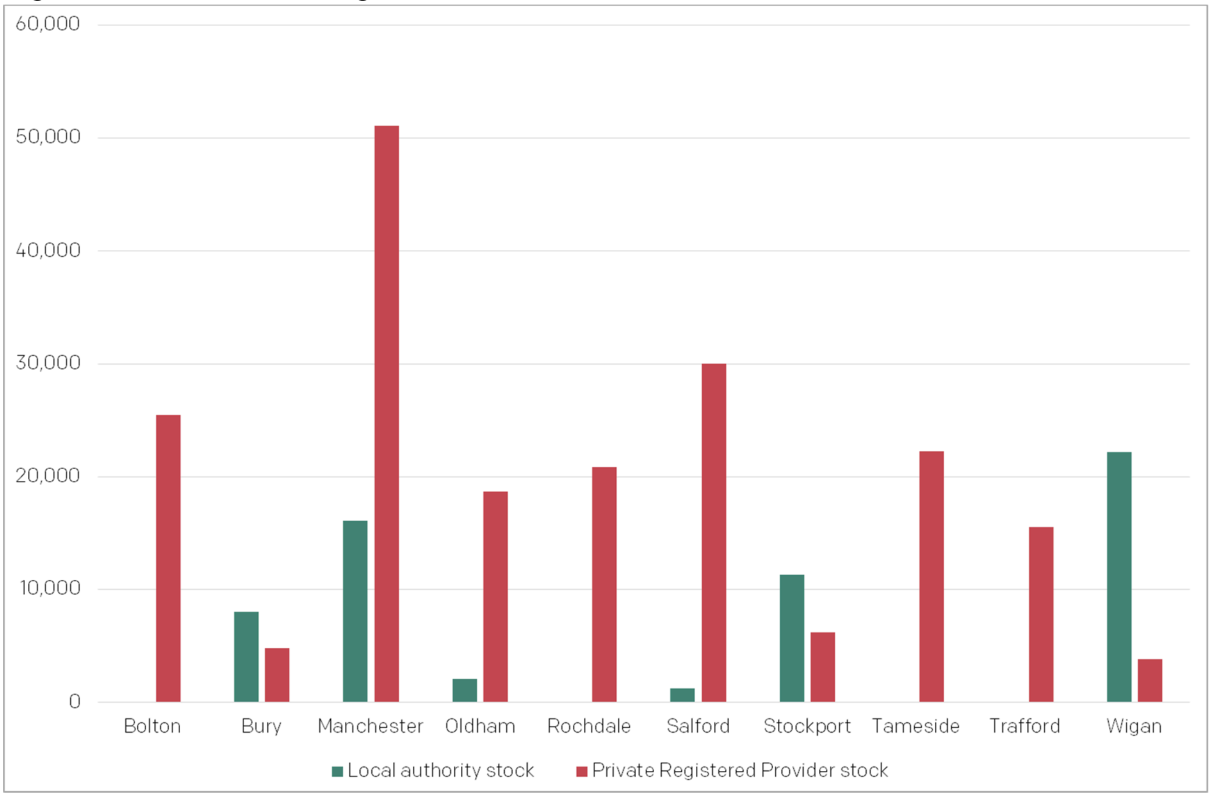
d) Other affordable routes to home ownership: is housing provided for sale that provides a route to ownership for those who could not achieve home ownership through the market. It includes shared ownership, relevant equity loans, other low cost homes for sale (at a price equivalent to at least 20% below 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.

[46] National Planning Policy Framework (NPPF) Annex 2, July 2018. Available at: https://www.gov.uk/government/publications/national-planning-policy-framework--2

Affordable Housing Stock and Delivery

<u>Affordable housing stock</u>

Figure 5.14: Social housing stock in Greater Manchester, 2017/18

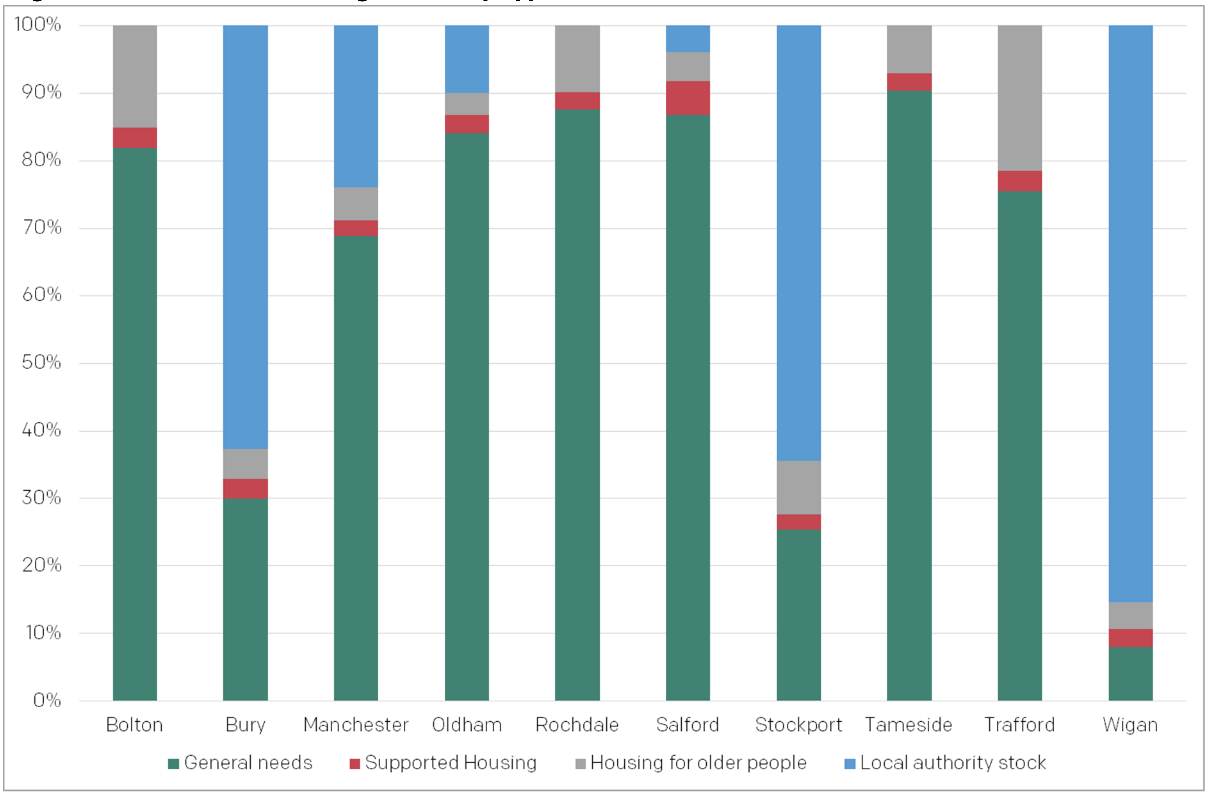


Source: Local Authority Housing Statistics dataset (including imputed data), England 2016-17: Section A - Dwelling Stock; Regulator of Social Housing, Private Registered Provider Social Housing Stock in England: Statistical Data Return dataset 2018.

5.44 Social housing makes up around 20% of Greater Manchester's housing stock, at around 260,000 homes in 2017/18. In some districts social housing is still primarily owned by the local authority and others hold no stock having completed a stock transfer, so all social housing stock is held by Registered Providers (RPs) of social housing.

5.45 Manchester has the highest level of social housing in terms of numbers and proportion of stock, at 67,000 dwellings and around one third of its dwelling stock, with just under a quarter owned by the local authority. There are around 31,000 socially rented homes in Salford and 25,000 in Wigan and Bolton. Bury is the local authority with the least social housing stock in numbers, but Stockport contains the least proportionally to its housing stock.

Figure 5.15: Social housing stock by type in Greater Manchester, 2017/18



Source: Local Authority Housing Statistics dataset (including imputed data), England 2016-17: Section A - Dwelling Stock; Regulator of Social Housing, Private Registered Provider Social Housing Stock in England: Statistical Data Return dataset 2018

5.46 At a Greater Manchester level, 87% of RP owned social housing stock is general needs, 10% of stock is housing for older people and 3% is supported housing. Bury, Stockport and Wigan retain the majority of their housing stock (Bury and Stockport managed through an Arm's-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.

Table 5.6: Local Authority and Private Registered Provider housing stock in Greater Manchester by rent level, 2016/17

Area	Social rent		Affordable rent		Total stock
	Number	Proportion	Number	Proportion	
Bolton	22,320	87.5%	3,181	12.5%	25,501
Bury	12,342	96.6%	430	3.4%	12,772
Manchester	64,563	96.0%	2,669	4.0%	67,232
Oldham	19,450	93.6%	1,323	6.4%	20,773
Rochdale	19,211	92.0%	1,666	8.0%	20,877
Salford	29,311	93.8%	1,942	6.2%	31,253
Stockport	16,772	95.8%	737	4.2%	17,509
Tameside	20,140	90.5%	2,110	9.5%	22,250
Trafford	13,601	87.3%	1,978	12.7%	15,579
Wigan	25,043	96.8%	817	3.2%	25,860
Greater Manchester	242,753	93.5%	16,853	6.5%	259,606

Source: Local Authority Housing Statistics dataset (including imputed data), England 2016-17: Section A - Dwelling Stock; Regulator of Social Housing, Private Registered Provider Social Housing Stock in England: Statistical Data Return dataset 2018

5.47 Table 5.6 shows that at a Greater Manchester level, 94% of local authority and Private Registered Provider stock is let at social rent levels and 6% is at affordable rent levels. The highest levels of social rented stock are in Wigan, Bury, Manchester and Stockport, all with around 4% (or less) of general needs stock let at an affordable rent. Trafford has the highest level of affordable rental properties at 12.7%, with Bolton having 12.5% and Tameside 9.5%.

Affordable Housing Supply

5.48 Affordable housing is delivered through a number of different mechanisms, including delivery through the planning system and the Homes England (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 seven years.

Table 5.7: Total Additional Affordable dwellings completed, 2011-2018

Area	Total Additional Affordable dwellings- completions							
	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	Total
Bolton	170	100	250	160	50	110	60	900
Bury	110	130	70	120	70	70	100	670
Manchester	740	330	370	370	120	230	305	2,465
Oldham	220	140	220	150	20	80	21	851
Rochdale	130	110	120	170	30	70	54	684
Salford	260	180	170	490	210	460	258	2,028
Stockport	150	90	140	220	90	110	336	1,136
Tameside	160	160	140	220	80	100	80	940
Trafford	80	90	180	90	50	100	165	755
Wigan	100	80	70	130	110	220	336	1,046
Greater Manchester	2,110	1,390	1,730	2,120	820	1,550	1,715	11,435

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

5.49 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.

5.50 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 Affordable Homes Programme[47] coming to an end in this year. Figures for 2017/18 show a further increase in affordable completions at 1,715 dwellings.

5.51 Manchester and Salford saw the highest numbers of additional affordable dwellings over the period, accounting for 40% of Greater Manchester's total additional affordable homes. Bury, Rochdale and Trafford saw the lowest levels of affordable completions in the period.

Section 106 Delivery

5.52 The following table shows the number of homes delivered through section 106 agreements in Greater Manchester over the last three years, by type.

[47] For further detail, visit: https://www.gov.uk/government/collections/affordable-homes-programme-2011-to-2015-guidance-and-allocations

Table 5.8: Section 106 completions by type, 2013/14- 2017/18

Area	2013/14		2014/15		2015/16				2016/17				2017/18				Total
	Social rent	Affordable Home ownership	Social rent	Affordable Home ownership	Social rent	Affordable Home ownership	Affordable rent	Shared Ownership	Social rent	Affordable Home ownership	Affordable rent	Shared Ownership	Social rent	Affordable Home ownership	Affordable rent	Shared Ownership	
Bolton	-	-	-	-	-	-	-	-	-	-	-	-	-	-	10	-	10
Bury	-	-	-	24	-	28	-	-	-	30	-	-	-	27	-	-	109
Manchester	-	-	-	-	-	-	-	11	-	-	-	-	-	-	-	-	11
Oldham	-	-	-	-	-	-	-	-	-	-	-	29	-	-	-	-	29
Rochdale	-	3	-	-	-	-	-	-	-	-	5	-	-	-	-	-	8
Salford	16	14	2	15	10	4	12	4	-	-	13	2	2	-	4	10	108
Stockport	-	-	2	9	6	35	-	-	9	-	8	74	16	-	8	65	232
Tameside	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	0
Trafford	-	9	-	-	-	-	-	4	-	-	-	15	-	-	-	-	28
Wigan	-	11	-	16	-	50	-	-	-	34	7	9	-	53	15	38	233
Greater Manchester	16	37	4	64	16	117	12	19	9	64	33	129	18	80	37	113	768

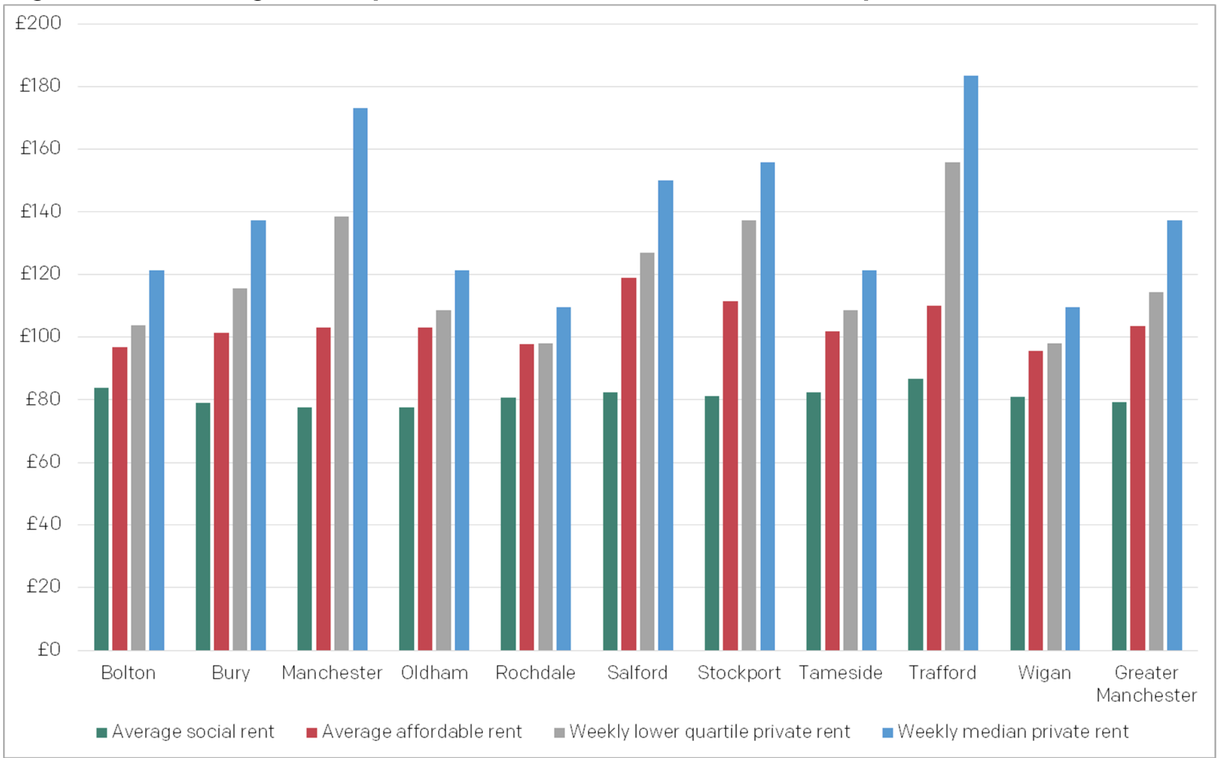
Source: MHCLG Live Table 1011c: Affordable Housing Supply Statistics

5.53 The table above shows the variation in the number and type of section 106 homes delivered across the districts between 2013/14 and 2017/18. It should be noted that these numbers do not include overage deals negotiated, which may contribute to more affordable homes being delivered. Stockport and Wigan have had the highest number of section 106 completions at 375 and 360 completions respectively.

Rental Affordability

5.54 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.

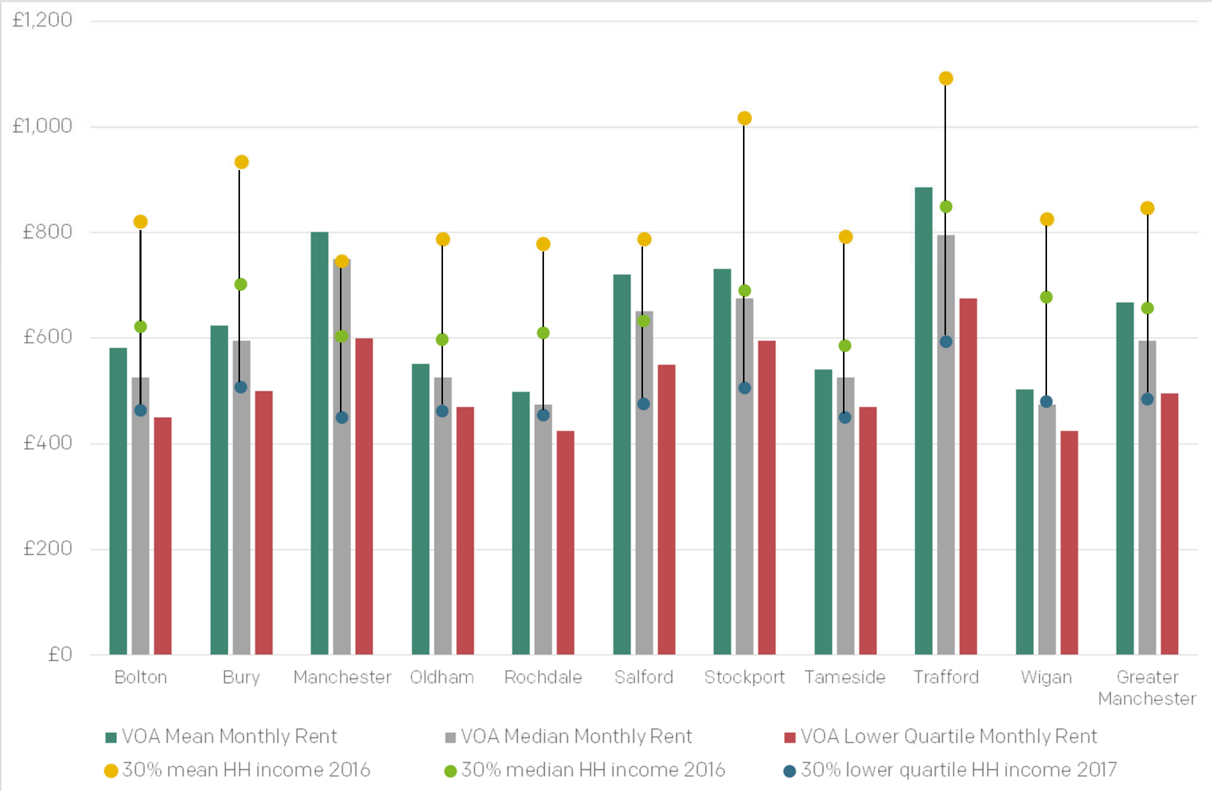
Figure 5.16: Average weekly social, affordable and PRS rents by district, 2017/18



Source: 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

5.55 Figure 5.16 shows the average weekly social and affordable rents for the Greater Manchester districts, alongside lower quartile and median private rents. In Trafford and Manchester private rents are significantly higher than those in the social rented sector, likely due to 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 £43, and in Wigan and Rochdale it is around £30.

Figure 5.17: 30% of monthly household earnings in relation to renting the average privately rented property by district, 2016/17

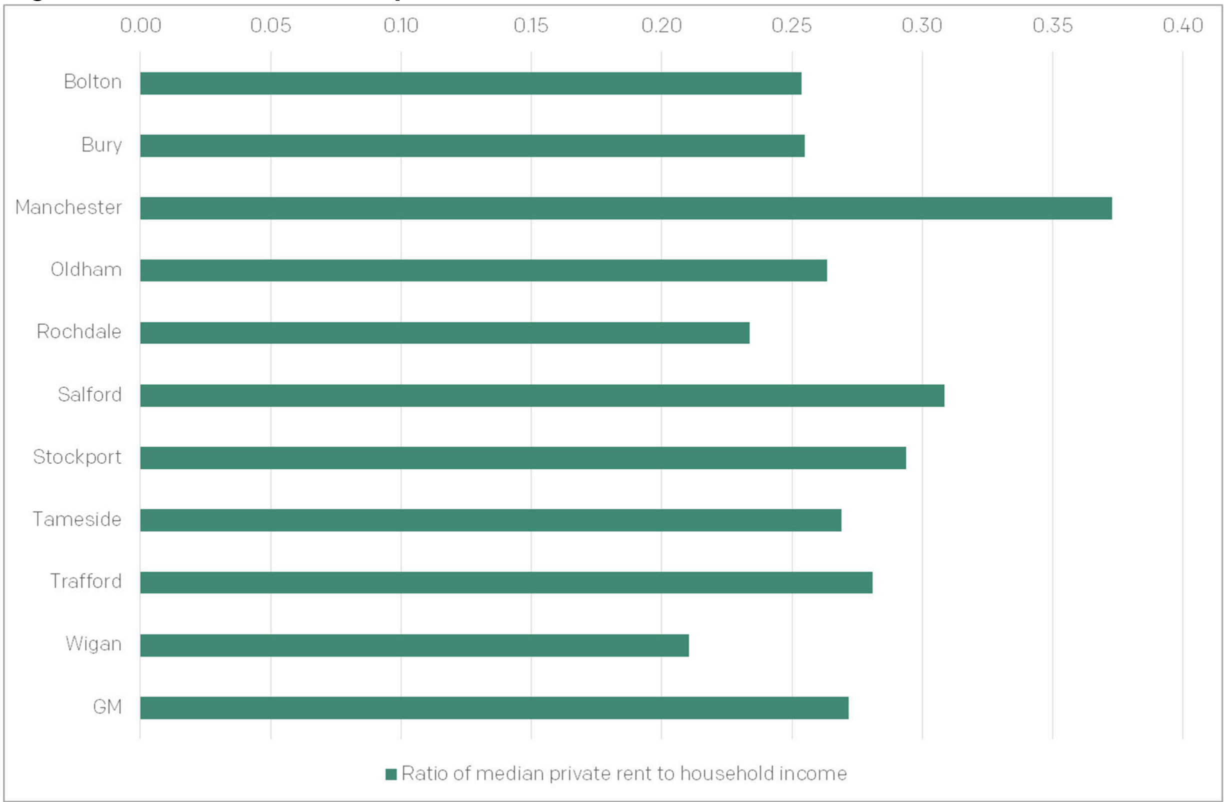


Sources: Valuation Office Agency Private Rental Market Statistics, 2018; CACI Paycheck 2017; ONS Ratio of house price to residence-based earnings (lower quartile and median)

5.56 Figure 5.17 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 which mean that the affordability challenge may not be as stark as is depicted here.

5.57 Across Greater Manchester there appears to be more of an issue around affordability at the lower quartile, with only Wigan and Rochdale having lower quartile rents that are significantly lower than 30% of lower quartile earnings. In Manchester, Salford, Stockport and Trafford, rents exceed 30% of income at the lower quartile. 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 5.18: Ratio of median private rents to median income

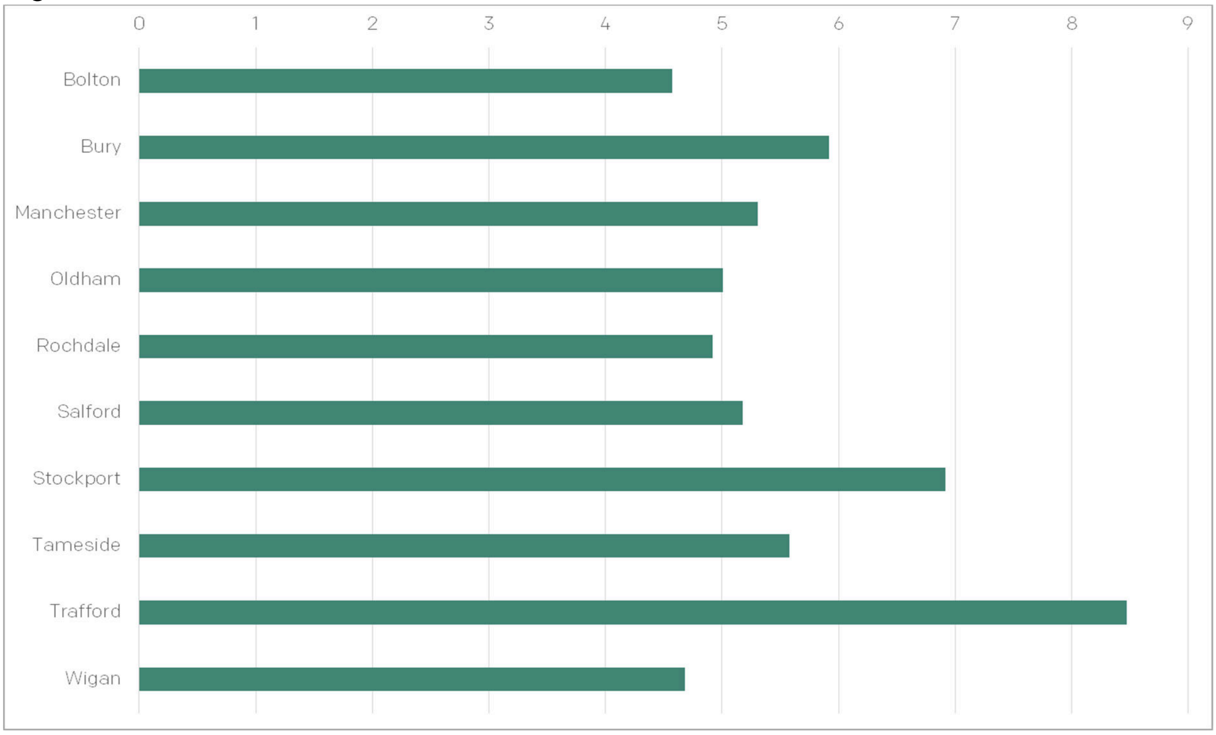


Sources: Valuation Office Agency Private Rental Market Statistics 2018, CACI Paycheck 2017

5.58 Figure 5.18 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.

Homeownership affordability

Figure 5.19: Ratio of Lower Quartile Household Incomes to Lower Quartile Price Paid



Source: H M Land Registry Price Paid Data 2016, CACI Paycheck 2017

5.59 Looking at household incomes to lower quartile house paid data across Greater Manchester as a whole, the purchase price for lower quartile value homes would be 5.2 times the lower quartile income. Manchester and Trafford have the highest ratios, at 6.6 and 6.2 times income respectively.

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

5.60 There are currently a number of 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 model 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*).[48] Using income data from CACI, the approximate proportion of households which fall below this income level has been calculated.

[48] IPPR (2017), *Priced Out? The affordability crisis in London*. Available at: https://www.ippr.org/research/publications/priced-out

Table 5.9: Renting options in Greater Manchester (based on 2-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	£354	£4,252	£14,173	20%	LA Housing Statistics dataset, England 2015-16: Section H - Rents and Rent Arrears Private Registered Provider Social Housing Stock in England: Statistical Data Return dataset 2016	Assumes average of RP and LA Social Rent in Greater Manchester, 2015/16
Affordable rent	£422	£5,067	£14,477	26%		
Private rent: lower quartile	£495	£5,940	£16,971	31%	VOA Private Rental Market Summary Statistics	
Private rent: median	£595	£7,140	£20,400	38%		
Rent to Buy: just rental costs	£476	£5,712	£16,320	26%	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.*

5.61 The table shows that approximately 20% of Greater Manchester households are at an income level below that needed to afford social rents and 26% are below that needed to afford 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, suggesting that those who would not be able to afford their rent are covered by HB.[49] 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

[49] 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.

property, this does mean that the figures above may overstate the proportions of Greater Manchester households below each of the thresholds identified.

5.62 Nonetheless, with that caveat, the model suggests that lower quartile private rents are unaffordable to approximately 31% of households in Greater Manchester and at the median private rent of £595 per month, this figure increases to 38% of households.

5.63 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.

5.64 However, as discussed earlier, all of 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 a Greater Manchester level.

Table 5.10: 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 Incom e ratio	Income needed for LTI ratio of >3.5	Approx. % Greater Manchester households below income level needed**	Assumptions
Shared Ownership	£3,514	£140,575	£402	£4,818	£13,767	20%	2.55	£10,041	14%	Purchase of 25% stake in property, with 10% deposit. Rent at 2.75% of value of remaining 75% of property.
Help to Buy	£7,029	£140,575	£533	£6,397	£18,277	31%	6.15	£32,131	56%	5% deposit and 20% equity loan. No modelling of repayment of equity loan on sale of property.
Starter Homes	£11,246	£140,575	£512	£6,141	£17,546	33%	6.41	£32,131	59%	20% discount on purchase price, deposit of 10% of discounted value.
Rent to Buy-purchase	£14,280	£140,575	£639	£7,663	£21,894	43%	6.42	£40,164	70%	Deposit is total difference between median rent and rent-to-buy levels- i.e. 20% of median rental costs being saved each month, for 10 years- not 10% of average first time buyer sales price
Purchase of average first time buyer property	£14,058	£140,575	£640	£7,676	£21,932	43%	6.41	£40,164	70%	10% deposit on property at average price for first time buyer
Purchase of lower quartile property	£10,110	£101,100	£460	£5,521	£15,774	26%	6.41	£28,886	54%	10% deposit on property at lower quartile price Greater Manchester house price- land registry data

*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.

5.65 Table 5.10 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. It should be noted that the modelling does not take into account 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 are able to 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.

5.66 The analysis shows that the average first time buyer property (£140,575) would be affordable for approximately 80% of Greater Manchester households if purchased under shared ownership, while 74% of households could afford the traditional purchase of a lower quartile property (£101,100). 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.[50] 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 6.41.

5.67 Help to Buy was initially found to be unaffordable to 31% of households and starter homes to 33%. Once the income to mortgage ratio is factored in, this increases to 56% and 59% respectively of households being unable to access the loans they would need to use these products. Purchasing a Rent to Buy property and the average first time buyer property are both unaffordable to 43% of households at the 35% of income measure; factoring in the income to mortgage ratio this increases to almost 70%.

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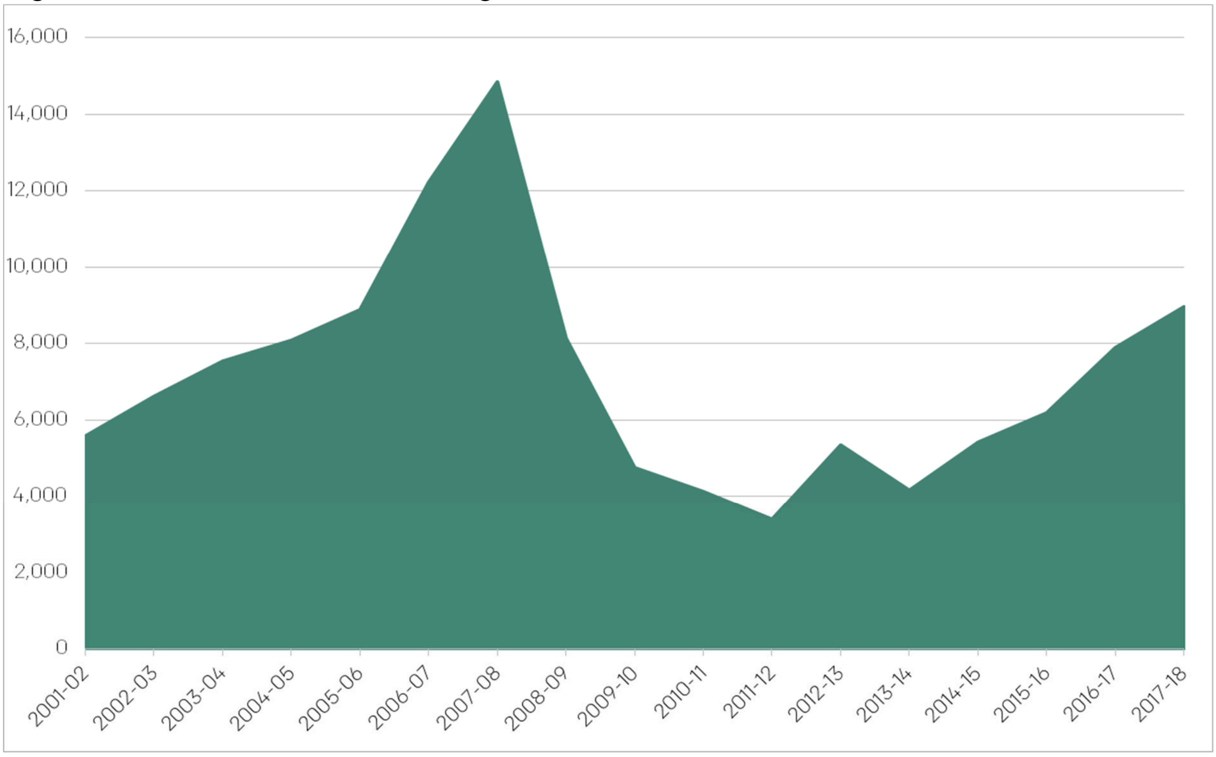
[50] Based on data from the Council Mortgage Lenders (2015) showing the average first time buyer loan to income ratio in England was 3.61.

5.6 Housing development rates

5.68 MHCLG Live Table 122 provides data on the number of net additional dwellings provided each year since 2001. Although this data is based on the Housing Flows Reconciliation 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.

5.69 There were 8,961 net additional dwellings completed in Greater Manchester in 2017/18, representing a 13.5% increase on the previous year. Figure 5.20 below sets out the number of net completions for Greater Manchester since 2001/02. As with trends seen nationally, Greater Manchester experienced a peak in completions around 2007/08 after which there was a significant decline in net completions to 2011, since when there has been a steady recovery.

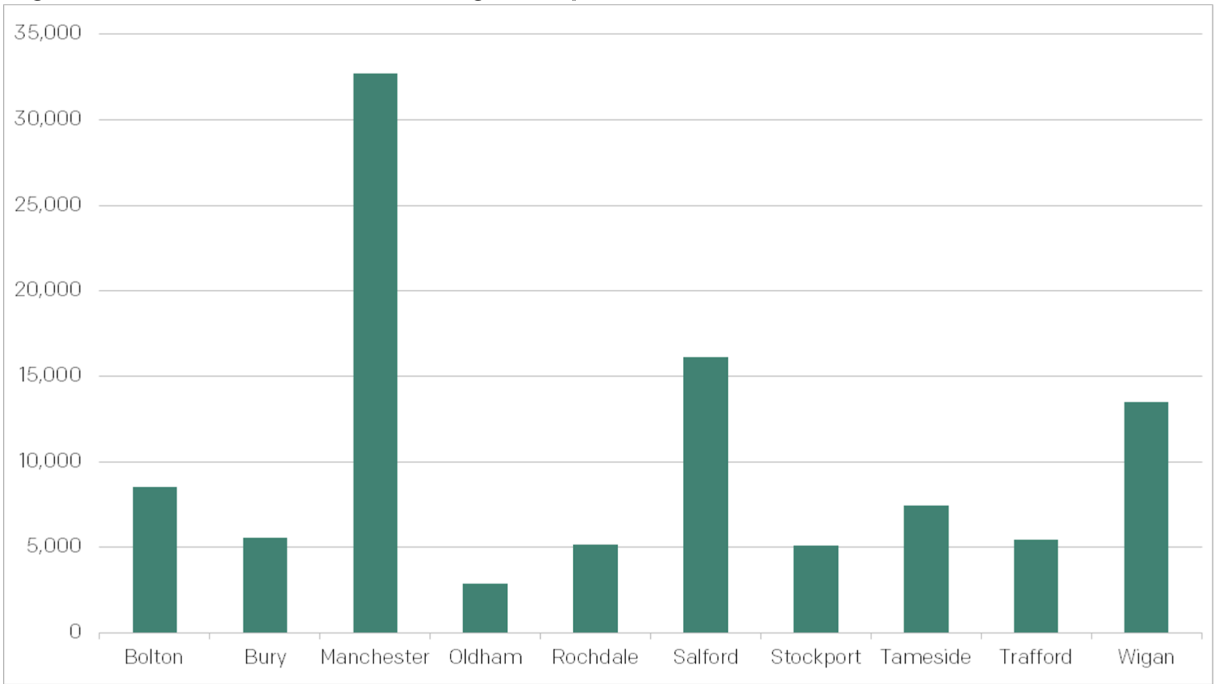
Figure 5.20: Net additional dwellings in Greater Manchester, 2001/02 – 2017/18



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

5.70 The chart below sets out the total net additional dwellings completed in each district between 2004/05 and 2017/18. Overall, 102,406 net additional dwellings were completed in Greater Manchester, an average annual completions rate of just over 7,310 dwellings. Manchester accounted for around one-third of these completions for this period. Wigan and Salford also made a substantial contribution to the supply of additional housing in the conurbation, achieving an average of around 1,000 dwellings per annum since 2004. The increase in dwellings within Greater Manchester has been dominated by the axis stretching westwards from the centre.

Figure 5.21: Net additional dwellings completed 2004/5-2017/8



Source: MHCLG Live Table 122 Net additional dwellings by local authority district, England 2004-05 to 2017-18

5.71 Net additions have been particularly low in Oldham, with an average of under 200 per annum accounting for only 2.8% 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. The number of net additional dwellings has also been relatively low in Stockport, Rochdale, Trafford and Bury.

Data tables on the number of net additional dwellings per Greater Manchester district since 2004 is available in Appendix 8.2.

5.7 Overcrowding, under-occupation and concealed households

Overcrowding and under-occupancy

5.72 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).

5.73 Table 5.11 compares the levels of overcrowding recorded between the 2001 and 2011 Census periods. It 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 5.11: Percentage change in level of overcrowding (total number of rooms short) 2001-2011

Area	2001			2011		
	1 room	2+ rooms	Total	1 room	2+ rooms	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: Census 2001 and 2011

5.74 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.

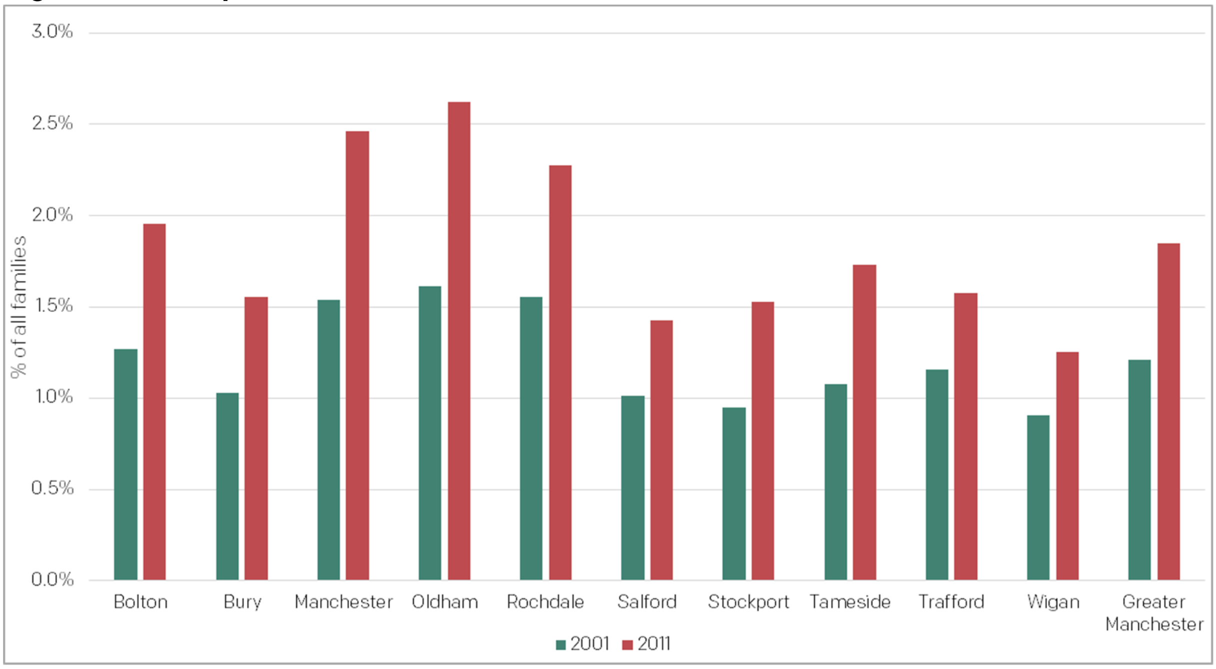
5.75 The rooms' occupancy rating assumes that every household, including one person households, requires a minimum of two rooms excluding bathrooms, in addition to the number of bedrooms needed. Based on this definition it is likely that the increase in overcrowding in Manchester and Salford is related 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.

Supporting data on overcrowding and under-occupancy can be found in [Appendix 8.2](#).

Concealed families

5.76 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 5.22 below, the highest proportions of concealed families are in Oldham, Manchester and Rochdale, with relatively low levels in Wigan, Salford, Stockport and Bury.

Figure 5.22: Proportion of concealed families 2001 and 2011



Source: Census 2011

5.77 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.*[51]

5.78 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.[52]

5.79 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.

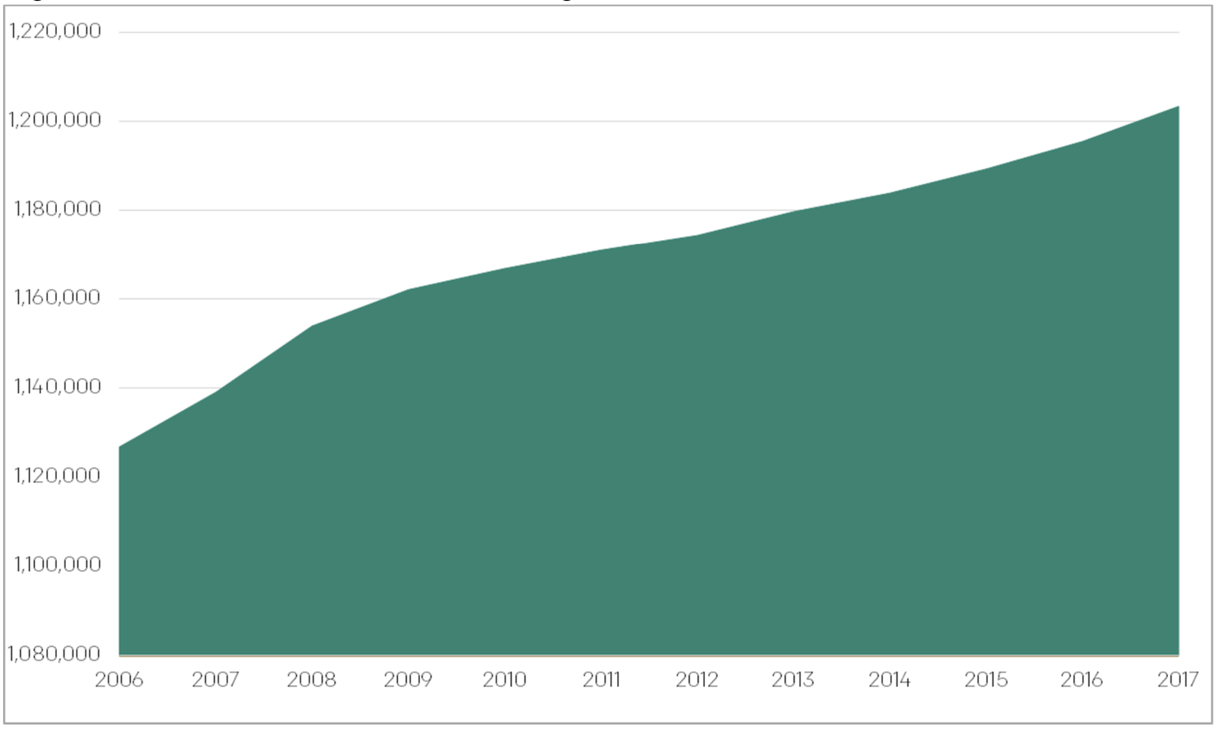
Further information on concealed families is available in Chapter 4. More detailed analysis showing composition (lone parent and couple concealed family) and ethnicity is also available in Appendix 8.2.

[51] Office for National Statistics (February 2014), *What does the 2011 Census tell us about concealed families living in multi-family households in England and Wales?*, p.11
[52] Census 2001 and 2011

5.8 Vacancy levels

5.80 There has been an increase of 76,480 dwellings in Greater Manchester since 2006, as shown in the chart below. This represents a 6.8% increase in stock across the conurbation.

Figure 5.23: Greater Manchester Dwellings 2006-2017



Source: MHCLG Live Table 125: Dwelling stock estimates by local authority district, 2006-2017

5.81 Salford recorded the highest rate of increase during this time, at 13.3% followed by Manchester at 11.8%. This is significantly above the Greater Manchester rate and national average (8.5%). Oldham and Stockport had the lowest increase in the number of dwellings, at 2.5% and 3.0% respectively.

Data tables on the number of dwellings per Greater Manchester district since 2006 are available in [Appendix 8.2](#).

Vacant dwellings

5.82 Vacant dwellings, or empty homes, are a necessary 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 2.5% of dwellings across Greater

Manchester were classed as empty in 2017, which matches the level in England as a whole. At a district level, vacancy rates were lowest in Manchester, at 1.7% and highest in Oldham (3.1%) and Bury (3.0%). Between 2016 and 2017 the number of vacant dwellings in Greater Manchester decreased by 0.4%.

5.83 Table 5.12 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 2017.

Further data on vacancy levels is available in Appendix 8.2

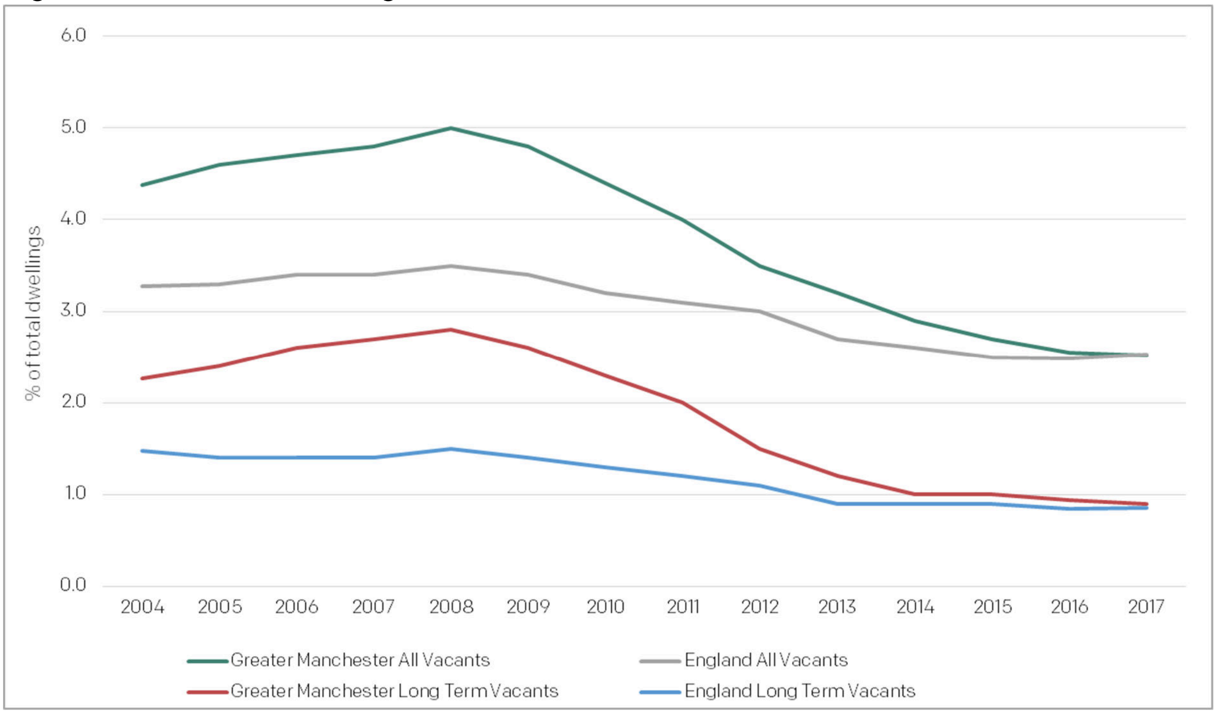
Table 5.12: Vacant dwellings 2017

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	3,497	2.8	1,298	1.1	37.1%
Bury	2,484	3.0	957	1.1	38.5%
Manchester	3,787	1.7	1,324	0.6	35.0%
Oldham	2,893	3.1	1,126	1.2	38.9%
Rochdale	2,684	2.9	858	0.9	32.0%
Salford	2,734	2.4	1,004	0.9	36.7%
Stockport	3,087	2.4	1,119	0.9	36.2%
Tameside	2,588	2.5	1,080	1.1	41.7%
Trafford	2,321	2.4	702	0.7	30.2%
Wigan	4,227	2.9	1,359	0.9	32.2%
Greater Manchester	30,302	2.5	10,827	0.9	35.7%
England	605,891	2.5	205,293	0.9	33.9%

Source: MHCLG Live Table 615 All vacant dwellings by local authority district, England, 2017 and MHCLG Live Table 125: Dwelling stock estimates by local authority district, 2017

5.84 The longer term trends in vacant dwellings in Greater Manchester are shown in Figure 5.24. England as a whole has observed a reasonably significant reduction in vacant dwellings since 2008, from 5.0% to 2.5% in 2017. Reductions in Greater Manchester have been more pronounced with the total number of vacant properties falling by 43% since 2006 from just over 53,000 to 30,300 homes.

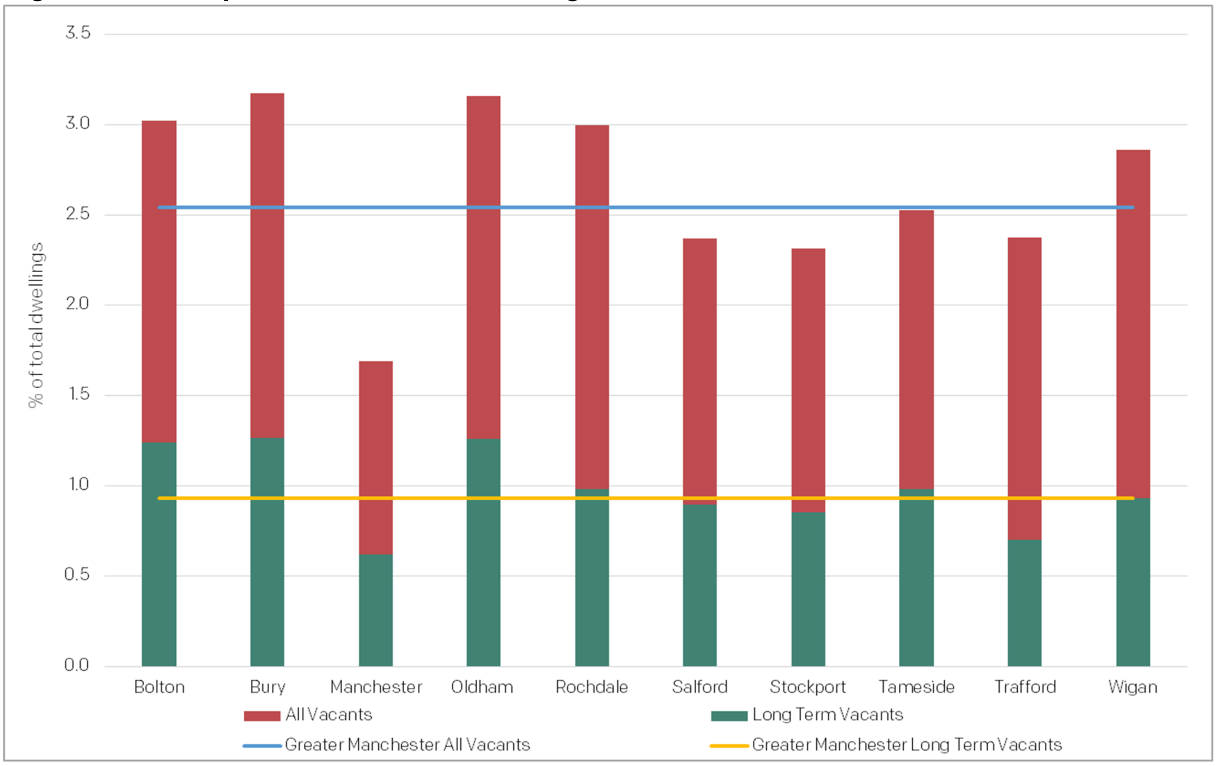
Figure 5.24: Vacant dwellings 2004-2017



Source: MHCLG Live Table 615 All vacant dwellings by local authority district, England, 2004-2017 and MHCLG Live Table 125: Dwelling stock estimates by local authority district, 2004-2017

5.85 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 2017, a level which is still marginally above the national rate of 0.8%. Since 2006, long-term vacancies have reduced by 64%, from 28,815 in 2006 to 10,800 recorded in 2017. Almost 36% of all vacant dwellings in Greater Manchester have been empty for over six months, slightly higher than the England average (34%).

Figure 5.25: Proportion of vacant dwellings 2017



Source: MHCLG Live Table 615 All vacant dwellings by local authority district, England, 2017 and MHCLG Live Table 125: Dwelling stock estimates by local authority district, 2017

5.86 Figure 5.25 shows the proportion of vacant dwellings across Greater Manchester districts for 2017. Trafford has consistently had the lowest proportion of long-term vacant dwellings in Greater Manchester at 0.7%, although this was surpassed by Manchester in 2016, which continues to have a long-term vacancy rate of 0.6%.

5.87 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.

Full data on vacancy rates at a Greater Manchester district level since 2004 is available in [*Appendix 8.2*]().

6 | Housing needs of particular groups

By 2036, there will be

more 85+ year olds than in 2016

100,000 students at Greater Manchester universities: proportions by district

Chapter summary

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

- The number of homes needed for families with dependent children will grow by almost 10% by 2035, though almost all of that growth will be in families with only one child.
- 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 significantly higher proportion of people with a long-term health problem or disability which limits their day to day activities living in the social rented sector than in either owner-occupation or private renting.
- By 2035, nearly three in twenty of Greater Manchester's residents will be 75 years or older - and one in twenty of us will be 85 or older – though our population profile will still be younger than the national average.
- Again by 2035, 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.
- The five higher education institutions in Greater Manchester together have a student body of around 100,000 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 in size, 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 trends more families with children and older households will rent privately.
- By 2035/36, we'll 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 20 of the 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 more 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

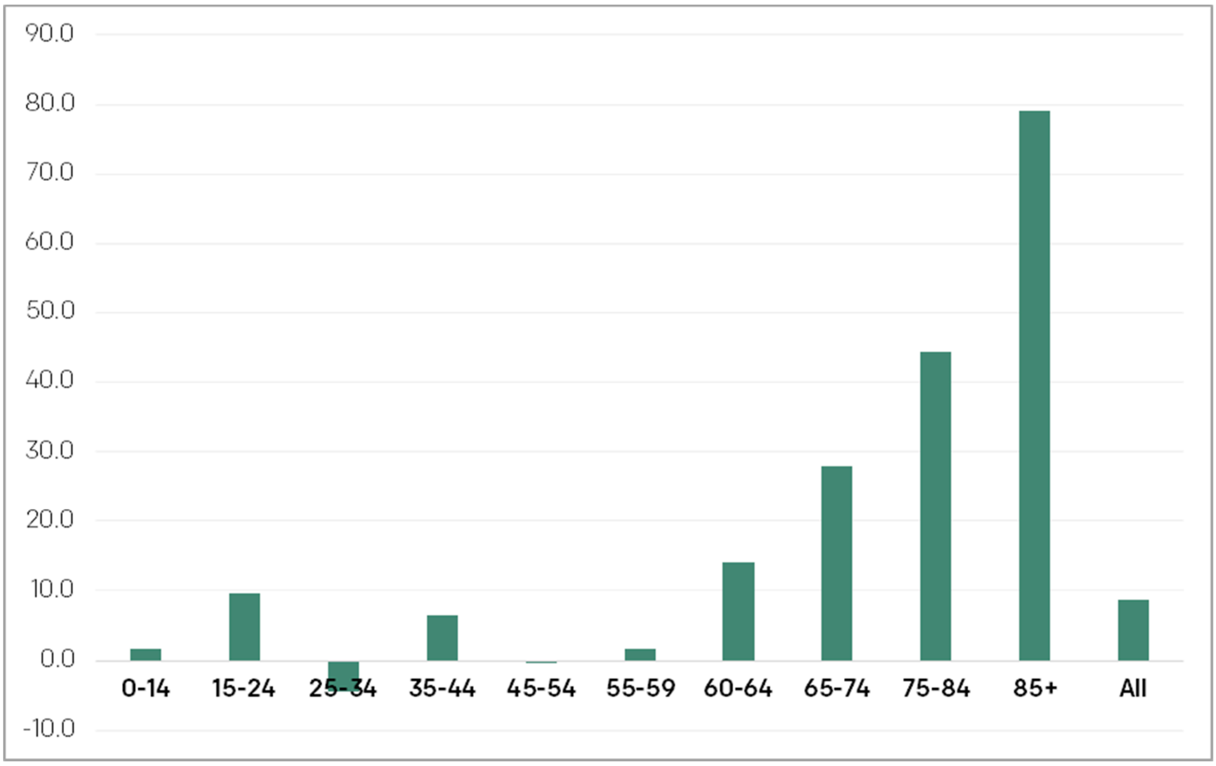
6.3 By 2030, one in three people in the UK will fall into the age bracket of 55 and over.[53] Office for National Statistics (ONS) data suggests that the number of over-80s is forecast to double from 3 million in 2015 to 5.9 million in 2035[54] and more than half of babies born now in the UK will live to be 100.[55] In light of this, it is crucial to understand the demographics, spatial patterns and tenure of older people in the UK and within Greater Manchester, as well as the current and future provision and supply of older people's housing.

6.4 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

[53] *Shelter, Policy: Report – A better fit?*, April 2012
[54] Modus, *A Very Grey Matter,* May 2014
[55] Age UK, *Housing in later life,* July 2014

20.7% in England.[56] The population is projected to increase for all age groups over 55, with the eldest age group of over 85 expected to increase by 79% between 2016 and 2036. This represents an increase from 1.9% of the total population in 2016 to 3.2% in 2036.[57]

Figure 6.1: Percentage change in population by five year age band in Greater Manchester, 2016 to 2036



Source: ONS 2016-based subnational population projections

6.5 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.[58]

6.6 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.

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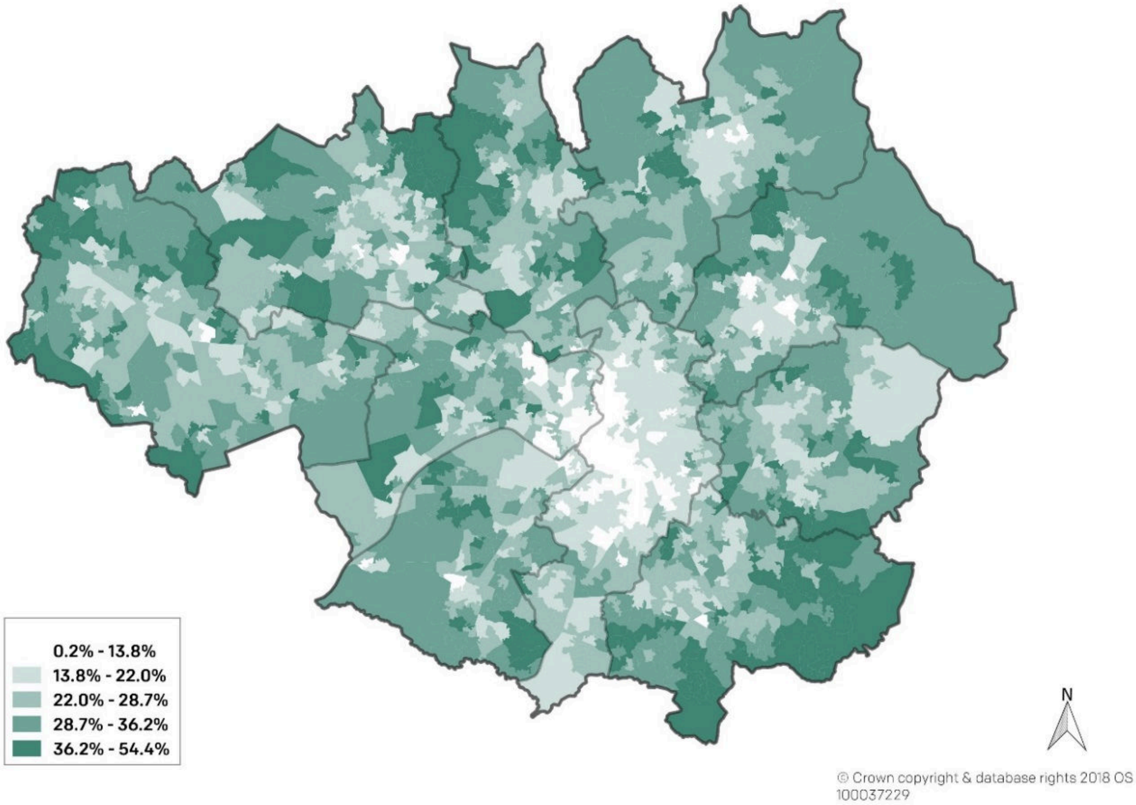
[56] Census 2011
[57] 2016-based subnational population projections
[58] 2016-based household projections

Map 6.1: Percentage of population aged over 55



Source: Census 2011

Healthy and life expectancy

6.7 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 77.8 years and Female 81.4 years.

6.8 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 periods. 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 60.6 years compared to the female 60.2 years.

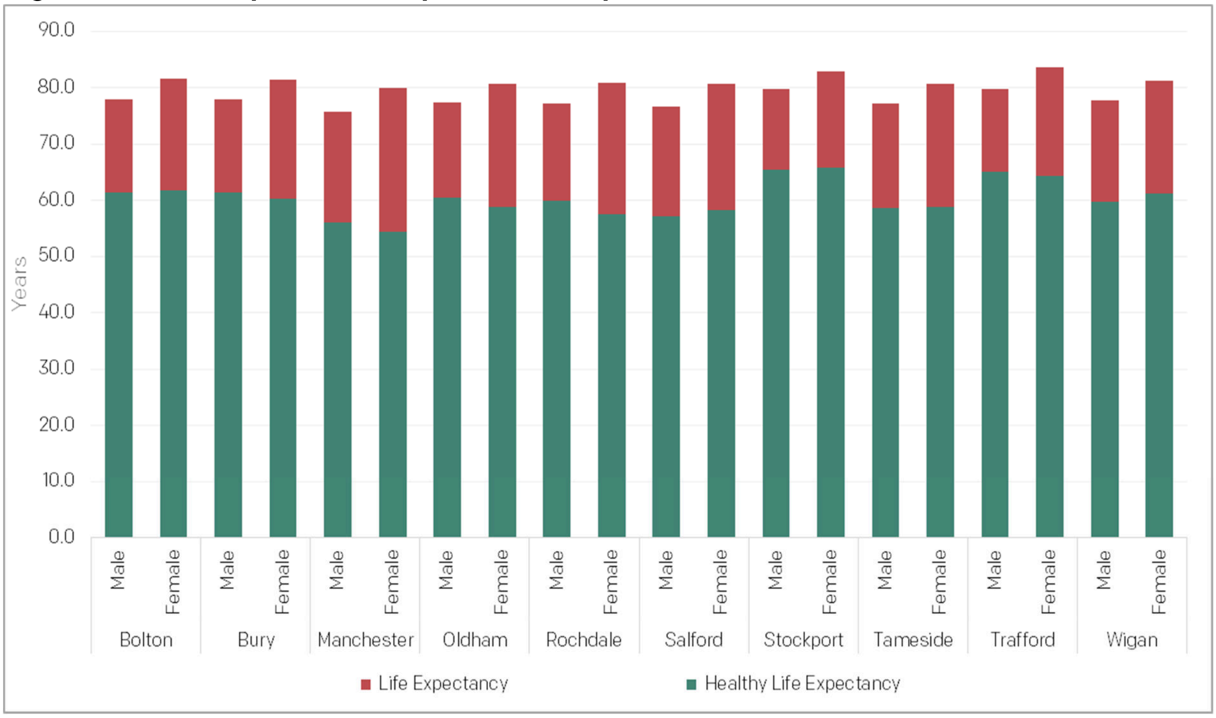
Table 6.1: Healthy and Life Expectancies by Gender, 2012 to 2014

Area	Male Life Expectancy (years)	Male Healthy Life Expectancy (years)	Female Life Expectancy (years)	Female Healthy Life Expectancy (years)
Greater Manchester*	77.8	60.6	81.4	60.2
North West	78.1	61.1	81.9	61.8
England	79.5	63.4	83.2	64.0

*Source: ONS (2017) *Average of ten local authorities*

6.9 The graph 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 79.9 years and a female life expectancy of 83.7 years. By contrast, in Manchester, males have a healthy life expectancy of 56.1 years and females 54.4 years.

Figure 6.2: Healthy and Life Expectancies by Greater Manchester District, 2012 to 2014



Source: ONS (2017)

Housing type and tenure for older people

6.10 Across Greater Manchester 30.2% of all one-bedroom properties are occupied by people over 65. This figure is highest in Oldham but 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 particularly 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

Area	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%
Greater Manchester	30.0%	35.3%	42.0%	55.1%	70.7%

Source: Census 2011

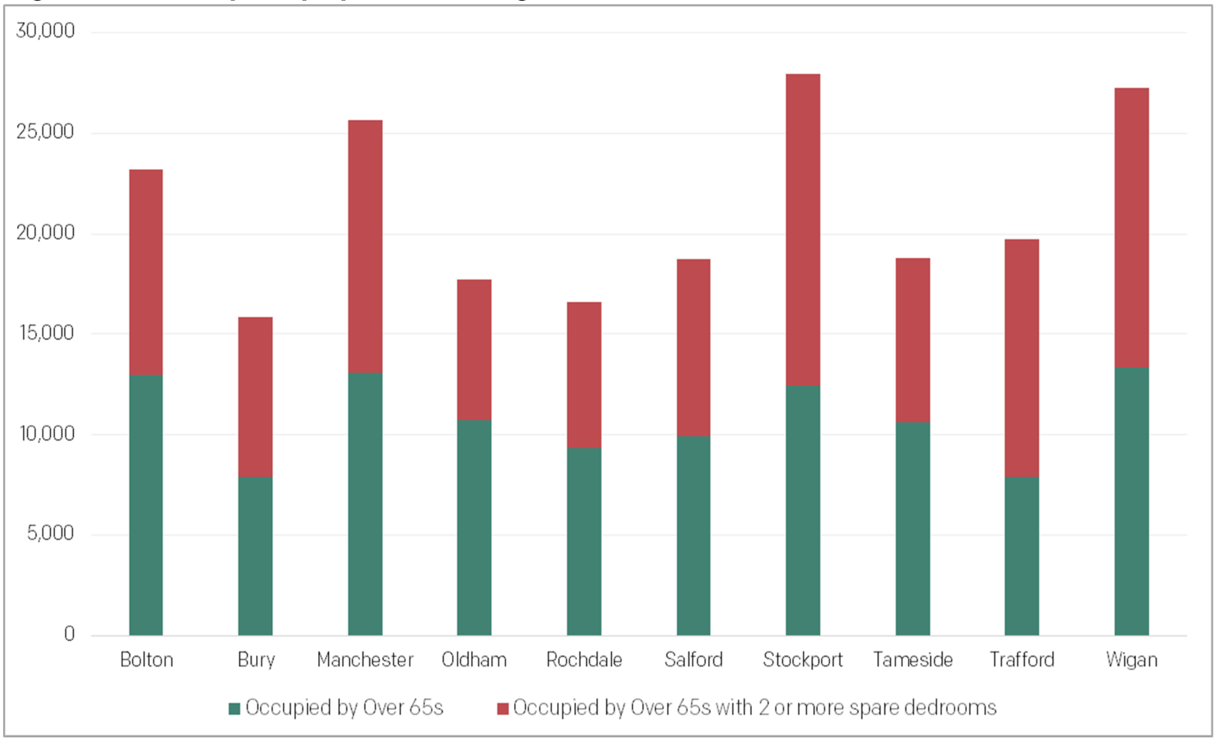
6.11 The majority of over 65s tend to be owner-occupiers and the majority own their home outright (i.e. no mortgage owed).

6.12 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 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.

6.13 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.

6.14 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: Census 2011

More detailed demographic profiling can be found in Appendix 8.3.

6.3 Housing with care (households with specific needs)

6.15 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

6.16 In Greater Manchester there will be 43% more people aged over 65 living alone by 2035 (although this is below the national average of 48.5%) and 70% more people requiring accommodation with high level support. Around 42% of those 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.[59]

6.17 By 2035, 30% 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 25.3%). In Greater Manchester, 7.8% of over 65s are predicted to have dementia in 2035, an increase of 63.3% from 2017. This is a lower proportion than for the North West as a whole (8.1%) and nationally (8.3%). This is a significant increase between 2017 and 2035 of 63.3% even though it is lower than the national increase of just over 70%. The districts of Wigan and Tameside are expected to experience the largest increase in the numbers of people with dementia at over 70%.[60]

Further work on demographic projections can be found in Appendix 8.3.

[59] http://www.poppi.org.uk/
[60] ibid

Housing stock

6.18 As of 2016 the current stock of housing specifically designed for older people in Greater Manchester consists of 1,108 properties with 33,774 dwelling units.[61] The only private developer operating at scale in Greater Manchester is McCarthy & Stone.

6.19 Analysis by the Housing Learning and Improvement Network (LIN)/Elderly Accommodation Counsel (EAC)[62] estimate that by 2035 there will be a housing with care need (which includes extra care and the enhanced sheltered sectors) of 8,500 units in Greater Manchester. This is split between 4,800 social/affordable units and 3,700 leasehold units.

6.20 At a district level, Wigan and Stockport are projected to have the highest number of property shortfalls by 2035 at over 1,000 each. In Wigan this is fairly evenly split between properties to rent and properties to lease. In Stockport the projected shortfall includes more properties for lease rather than rent, which is also the case in Trafford and Bury. Oldham and Rochdale, however, have more of a shortfall for rent (both 621) rather than to lease (193 and 221 respectively).

6.21 The projected estimates for sheltered and retirement housing suggest that there will be shortfall of just over 7,800 units by 2035. Of these units, however there are 1,170 less units needed for rent and therefore a total of almost 9,000 units will be needed. All districts require more sheltered units for lease with over 1,600 units needed in Wigan and Manchester. On the other hand, Bolton, Manchester, Rochdale, Trafford and Oldham will need less sheltered and retirement housing for rent.

Further details on housing stock can be found in Appendix 8.3.

[61] Elderly Accommodation Council (EAC)
[62] 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.

People with disabilities

6.22 The Census 2011 defines a long-term health problem or disability (LTHPD) 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.*[63]

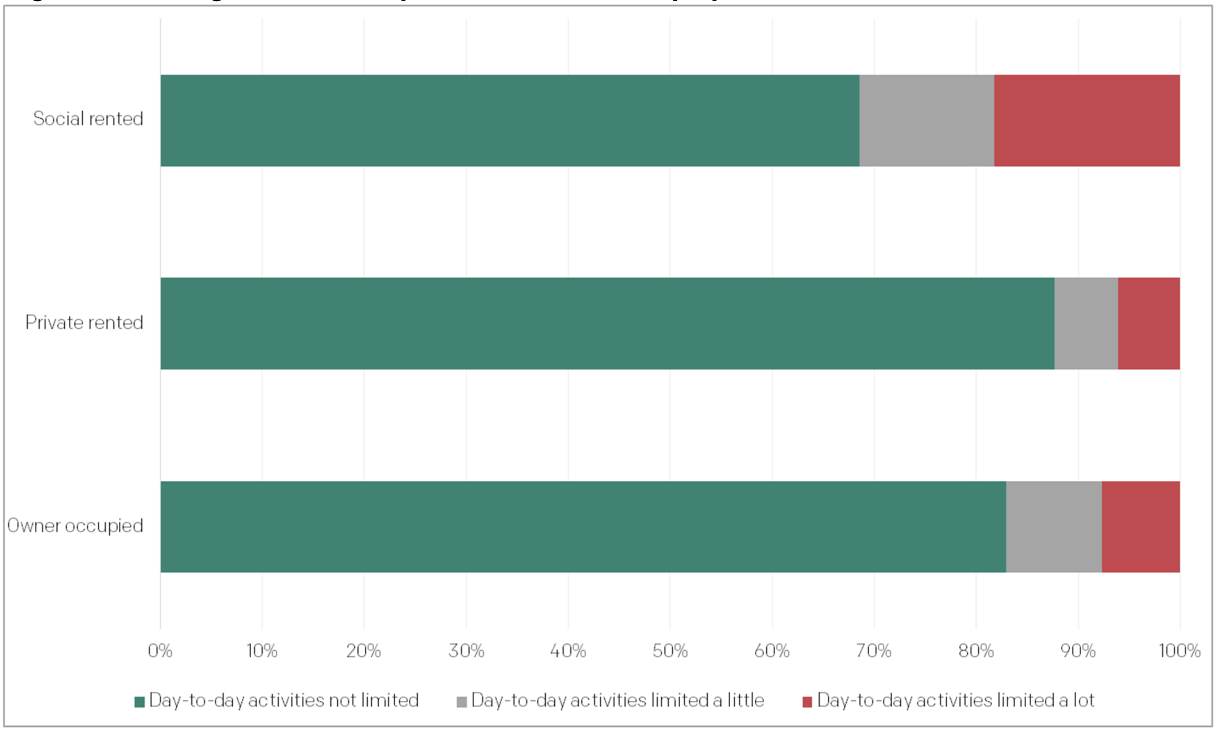
6.23 This definition is adopted for the analysis presented in this section.

6.24 Greater Manchester has a similar proportion of people with a self-reported LTHPD compared to the North West, though with a smaller proportion reporting an issue which limits their daily activities 'a little.' However, both Greater Manchester and the North West have a greater share of people with a LTHPD than England as a whole.

6.25 Figure 6.4 shows there is a relative concentration of people with a LTHPD 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 LTHPD 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 LTHPD than the national average. All ten Greater Manchester districts have a higher percentage of people with a LTHPD in social rented housing than the national average. Looked at as a whole, while the proportions vary slightly, these overall patterns replicate those found in the wider North West and across England.

[63] Census 2011: Glossary of Terms, Office for National Statistics 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

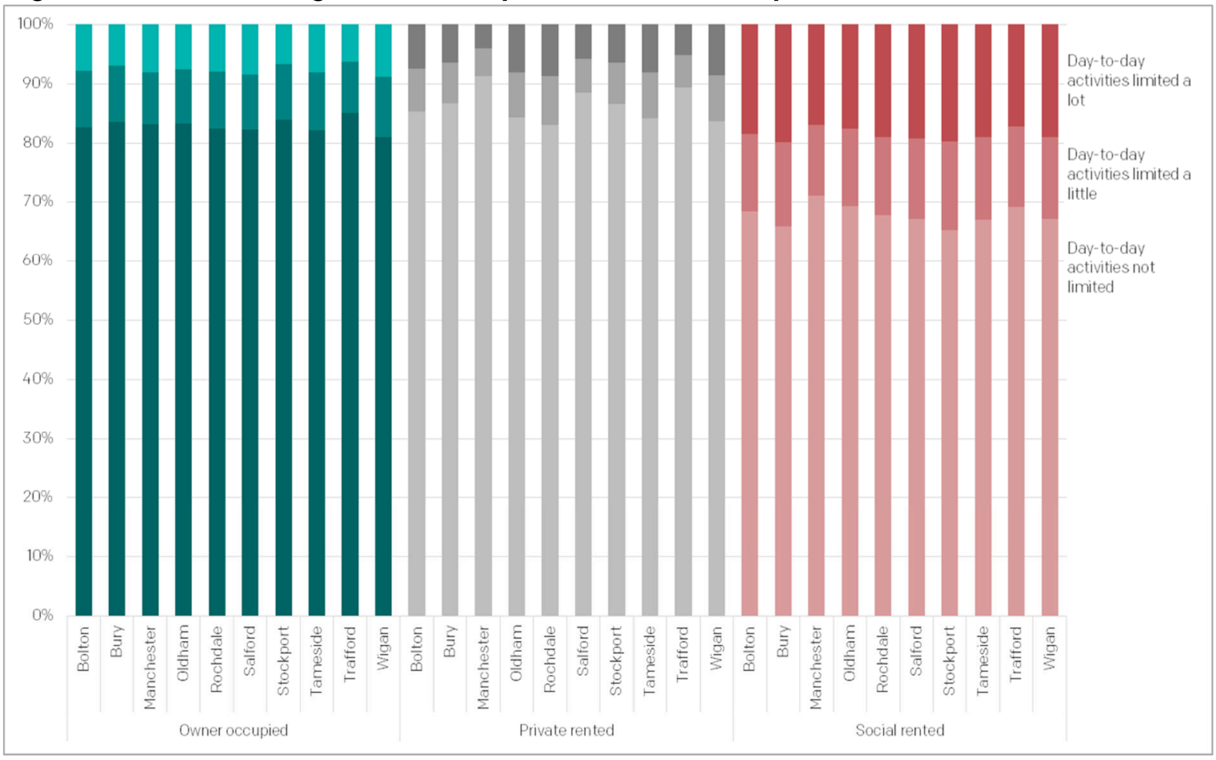
Figure 6.4: Long term health problem or disability by tenure, Greater Manchester, 2011



Source: Census 2011

6.26 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 LTHPD in the private rented sector 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: Census 2011

6.27 Projecting Adult Needs and Service Information (PANSI)[64] 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 presented below and in Appendix 8.3 to look at the impacts for Greater Manchester relative to the regional and national picture.

6.28 In Greater Manchester 2.2% of the population are expected to have a serious physical disability by 2035, similar to projections for the North West and nationally, both at 2.3%. 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.

6.29 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%).

[64] More information available at: http://www.pansi.org.uk/

6.30 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. Again Salford and Manchester have the lowest proportions of common mental disorders but are expected to experience the largest increase up to 2035.

Further details and supporting data on people with disabilities can be found in *Appendix 8.3*.

6.4 People with a housing and support need

6.31 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.*[65]

6.32 Supported housing may be provided for a number of 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;
- Offenders and ex-offenders; and
- Vulnerable young people (such as young parents and young people leaving care).

6.33 In England, supported housing is mostly owned by Registered Providers of social housing (RPs), with some local authorities owning their own supported

[65] https://www.thinklocalactpersonal.org.uk/_assets/MakingItReal/MIRHousing.pdf

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.

6.34 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

6.35 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 6.3: Number of units of supported housing and housing for older people owned by RPs, 2017

Area	Total units/bed spaces
Bolton	4,621
Bury	942
Manchester	4,787
Oldham	1,235
Rochdale	2,594
Salford	2,893
Stockport	1,787
Tameside	2,127
Trafford	3,821
Wigan	1,729
Greater Manchester	26,536

Source: Regulator of Social Housing, Private Registered Provider Social Housing Stock in England: Statistical Data Return dataset 2018

6.36 Table 6.3 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.

6.37 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.

6.38 The data return also does not provide information on the number of supported housing units by client group.

Supported Housing census

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

Table 6.4: 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
Total	3,660	32,690

Source: Greater Manchester Supported Housing Census, 2017

Future need for supported housing

6.40 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. More demographic analysis behind these projections is available in Appendix 8.3.

6.41 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 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.[66]

6.5 Private renters

6.42 The private rented sector (PRS) consists of homes that are rented from a private landlord, letting agency or other private organisations or individuals.

6.43 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.[67]

6.44 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.[68]

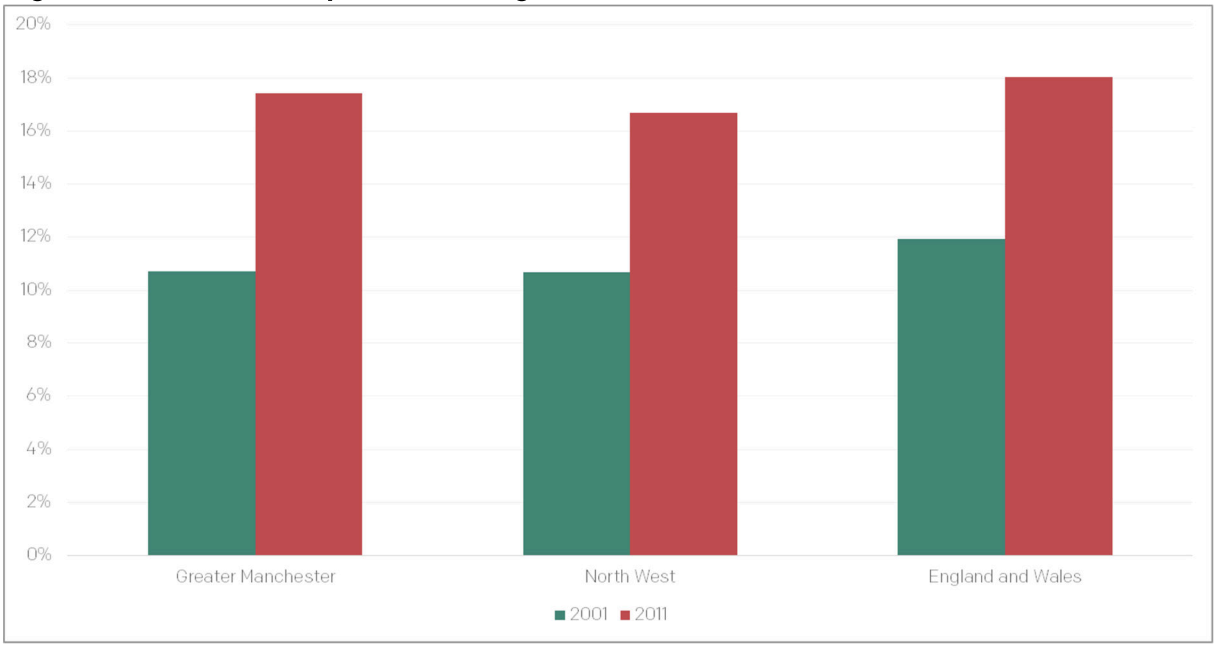
6.45 Figure 6.6 below sets out the proportion of households in the PRS in Greater Manchester, the North West and England and Wales at the 2001 and 2011 Censuses:

[66] 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_Projected%20demand_2017_author.pdf

[67] Census 2011

[68] Census 2001 and 2011. 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, 2001 and 2011



Source: Census 2001 and 2011

6.46 Growth in the PRS in Greater Manchester has outpaced that of the North West and England and 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.

6.47 This section provides a spatial analysis of the sector across Greater Manchester and highlights the policy context for the PRS.

For all sections, more detailed data and analysis can be found in *Appendix 8.3*.

Scale and distribution of PRS in Greater Manchester

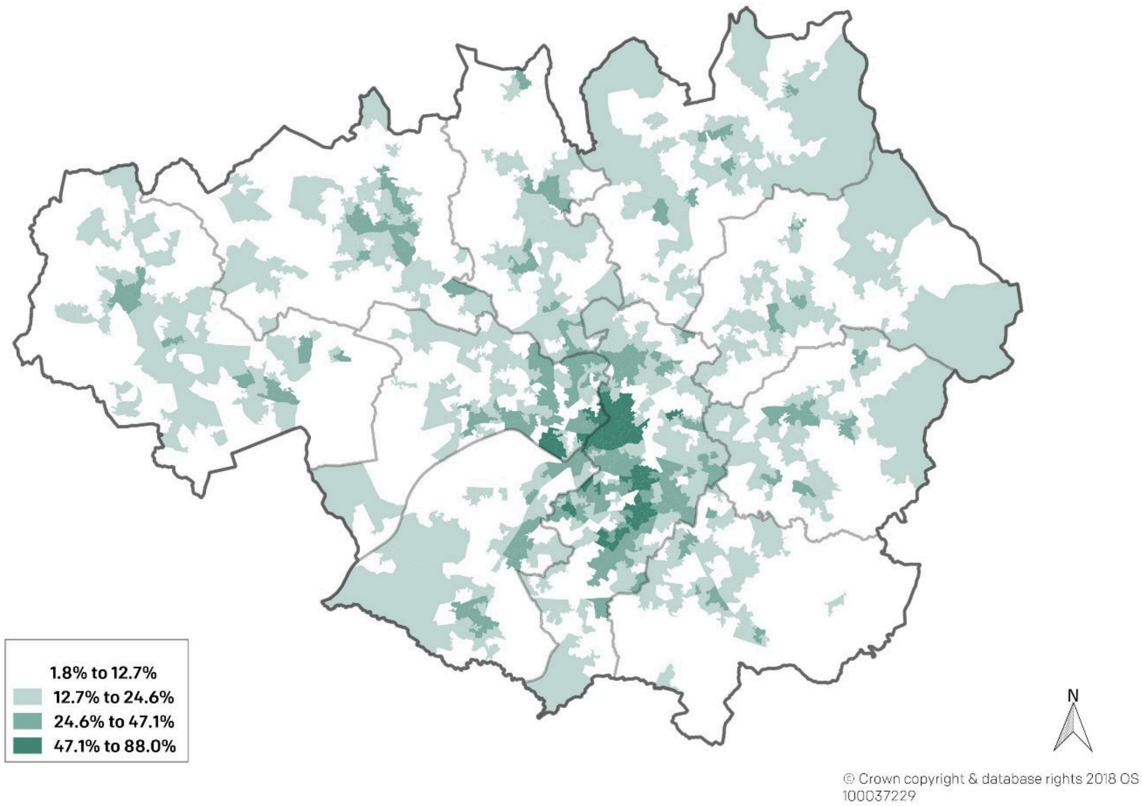
6.48 There are PRS households within all districts across Greater Manchester. Map 6.2 shows the distribution of all private rented households from the 2011 Census across Greater Manchester. There are clear clusters of private renting in central parts of the districts and the town and city centres.

6.49 High concentrations of PRS households (more than 50% of households) are predominately 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.

6.50 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: Census 2011

PRS Renter Groups

6.51 The majority of people who live in the PRS are under 35, with under-35s over-represented in the tenure in Greater Manchester (51% of PRS renters in Greater Manchester as opposed to 45% in England and Wales) and tending to live in urban areas. The sector is made up of a mixture of households ranging from single people to families, with 32% of PRS households with dependent children in Greater Manchester, a growth from 27% at the previous census. PRS tenants are also generally economically active; 68% of Greater Manchester PRS households are in work.[69]

6.52 Compared with social renting or owner-occupation households, the PRS is made up of a broader range of households, with the sector meeting a wide variety of housing needs.

6.53 New Economy modelling 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

6.54 Low Pay and Constrained renters make up almost half of PRS renters in Greater Manchester and 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.

For more detailed descriptions and spatial discussions of the PRS renter groups, see Appendix 8.3.

[69] Census 2011

Landlords

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

6.56 Research from the London School of Economics and the Council for Mortgage Lenders found that 62% of landlords sampled owned only one property; however, those who owned more than one property also owned 40% of the PRS stock. A total of 30% of landlords sampled had at least one buy to let mortgage, but 50% of the properties owned by landlords sampled were purchased with a buy to let mortgage.[70]

6.57 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).

6.58 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.[71]

6.59 Land Registry price paid data provides an indication of the number of properties a year which potentially involve PRS properties. It is possible to identify purchases under the power of sale/repossession, buy-to-lets (where identifiable by a mortgage) and transfers to non-private individuals. In 2015 there were 3,190 such sales in Greater Manchester, of them 370 were new build sales, of these 287 were for flats/apartments. For more information see appendix 8.3 Private renters.

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[70] CML Research, 'The profile of UK private landlords', Kath Scanlon and Christine Whitehead, LSE London, December 2016

[71] Government Housing White Paper. *Fixing our broken housing market*. February 2017. Available at: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/590464/Fixing_our_broken_housing_market_-_print_ready_version.pdf

Security of tenure

6.60 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.

6.61 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.[72]

6.62 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 that households that were accepted as homeless due to the end of an assured shorthold tenancy increased by 25% between 2015/16 and 2016/17.[73]

Type and condition of stock

6.63 The latest source of data on all PRS stock in Greater Manchester comes from the 2011 Census. The stock profile is varied across the districts in Greater Manchester, however the conurbation as a whole is broadly in line with that of England and Wales.

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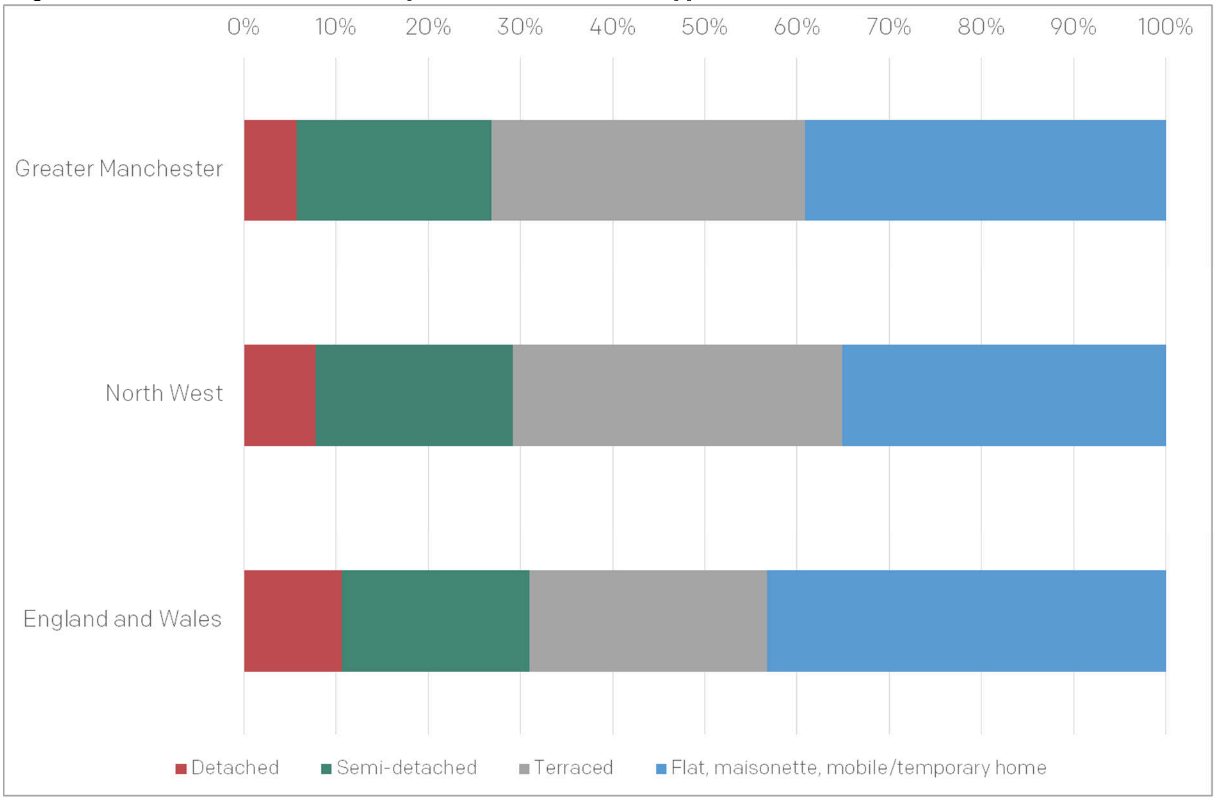
[72] New Economy, 'Private Rented Sector in Greater Manchester', 2014.
[73] MHCLG Live Tables on Homelessness, Table 784a: local authorities' action under the homelessness provisions of the Housing Acts: quarterly data for 2014 Q2 to 2017 Q1

Figure 6.7: PRS households by accommodation type, 2011



Source: Census 2011

6.64 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.

6.65 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 English Housing Survey 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.[74] Given the age profile of Greater Manchester's housing stock and the substantial proportion of the PRS stock which is in older, terraced properties, it is reasonable to assume that conditions may be worse in Greater Manchester than nationally.

[74] English Housing Survey, Headline Report, 2016/17.

Future trends in the PRS

6.66 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.

6.67 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.

6.68 Growth in the sector is predicted to continue and 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 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.

6.69 The significant growth in the sector over the last ten years has been influenced by a number of factors. 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 housing. The common themes that have influenced the growth of the PRS are as follows.[75]

[75] *The Building and Social Housing Foundation* (BSHF 2012: 14-15)

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 housed in the PRS.
- Flexibility and mobility in housing choice.
- The availability of Housing Benefit 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 Shorthold Tenancy in 1988 and 1996 and making them the default for most private rented lettings.
- Buy-to-let mortgages were introduced in 1996 which spurred the growth of the PRS. The Council of Mortgage Lenders estimate that there are about 1.5 million outstanding buy to let mortgages.
- Changes to the Housing Benefit entitlement of those in the social rented sector may lead to an increase in demand for private sector properties, particularly 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 Housing Benefit to the level of the Local Housing Allowance (LHA), which means their entitlement will be equal to that of private tenants. In particular 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. 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

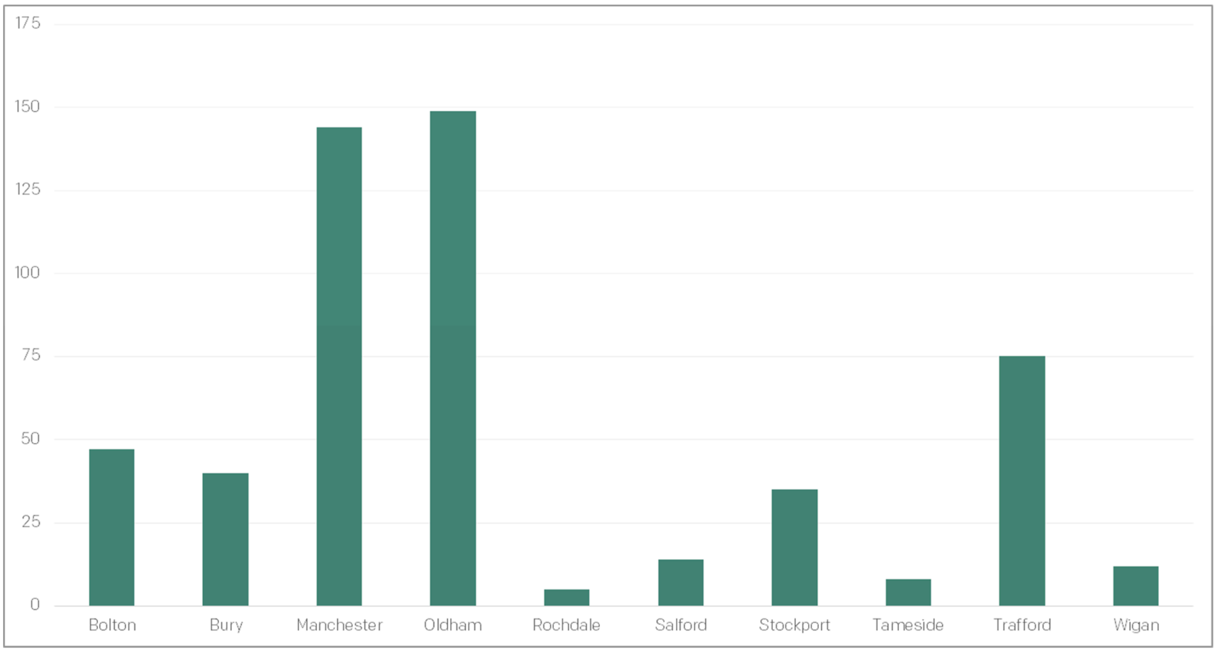
6.70 Planning guidance states that Government wants to enable more people to build or commission their own home and wants to make this form of housing a mainstream housing option. Historically, data regarding levels of self-build has been hard to come by. However, in accordance with The Self-build and 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 (e.g. capable of being provided with utility connections and road access within the duration of a development permission) in their area in order to build their own homes.

6.71 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.

6.72 The number of people registered on Greater Manchester's self-build registers in October 2017 was 454. Oldham has the highest level, 149, on its register, followed by Manchester (144) and Trafford (75). Oldham has "Custom Build Vanguard"[76] status which 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.

[76] 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, October 2017



Source: Greater Manchester local authorities

6.73 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.

6.74 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.

6.75 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

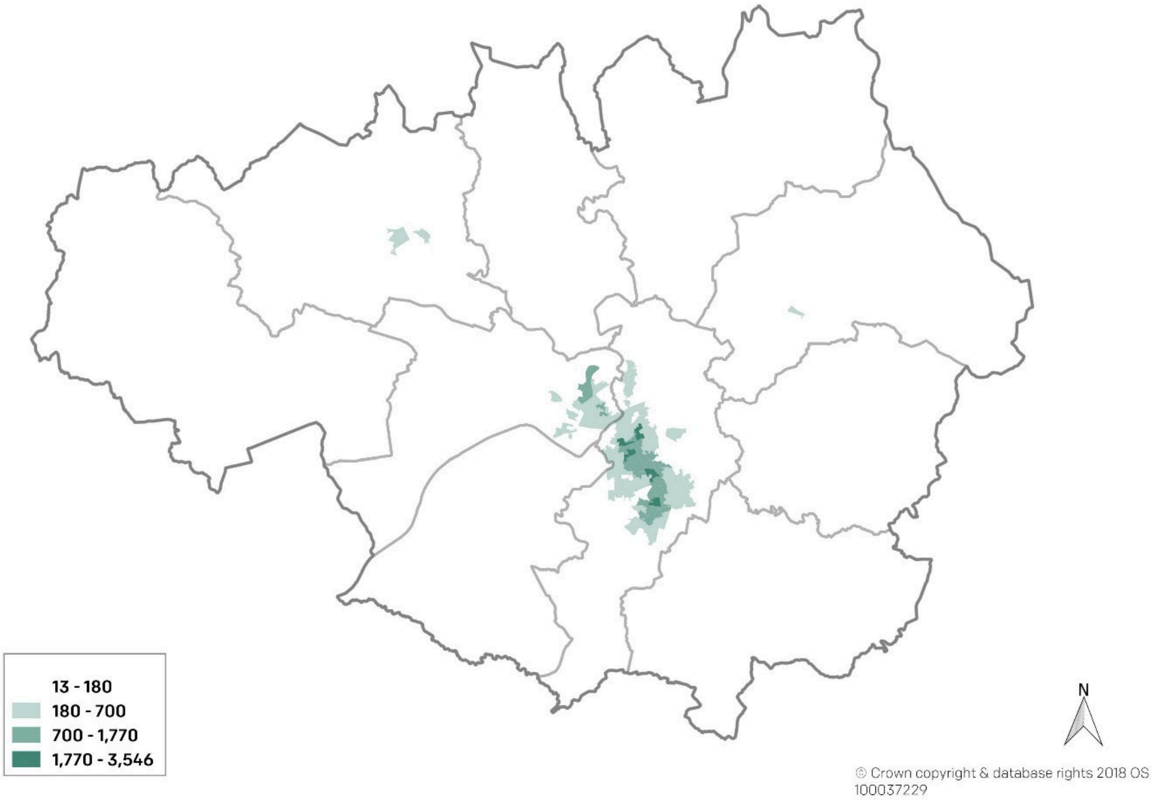
6.76 Greater Manchester has a significant student population, reflecting its strong university base largely situated in the regional centre.

6.77 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%.

6.78 These student households in Manchester are mostly in the area stretching from the 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. This is reflected in the map below.

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



Source: Census 2011

6.80 There are 13 further education colleges which provide education and training and offer higher level qualifications for young people across Greater Manchester.[77] There are five higher education institutions (HEIs) in Greater Manchester with a combined student body of almost 100,000.[78] HEI enrolment in Greater Manchester is broken down in the table below.

Table 6.5: Student enrolments at Greater Manchester HEIs 2013/14 to 2015/16

Higher Education Institution	Enrolments			% Change 2013/14 to 2015/16
	2013/14	2014/15	2015/16	
University of Manchester	37,925	38,590	39,700	4.7
Manchester Metropolitan University	32,160	31,355	32,410	0.8
University of Salford	18,485	18,920	20,520	11.0
University of Bolton	6,835	6,385	6,320	-7.5
Royal Northern College of Music	790	805	900	13.9
Total	96,195	96,055	99,850	3.8

Source: Higher Education Statistics Authority (HESA) 2015/16

[77] 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
[78] Higher Education Statistics Agency (HESA) (2015/16)

6.81 Students in higher education in Greater Manchester have increased by 3.8% between 2013/14 and 2015/16, with only the University of Bolton experiencing a 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 which was recorded immediately prior to the increase in fees.[79]

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 also outside of the UK. This is having an impact upon both the relative scale of demand for accommodation, as fewer students are living at home whilst studying at Greater Manchester HEIs.

Types of student accommodation

6.84 Broadly speaking there are two forms of student accommodation which 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. These can be either 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 private rented sector (PRS). These can range from shared houses or Houses in Multiple Occupations through to flats and serviced apartments.

Spatial Distribution of Students

6.85 Students in mainstream accommodation are exempt from paying Council tax. Council tax records for Manchester, Salford and Bolton for 2015/16 indicate that there are currently around 13,000 student households in mainstream accommodation in Greater Manchester, accounting for around 1.0% of the total housing stock, slightly above the national average of 0.6%.

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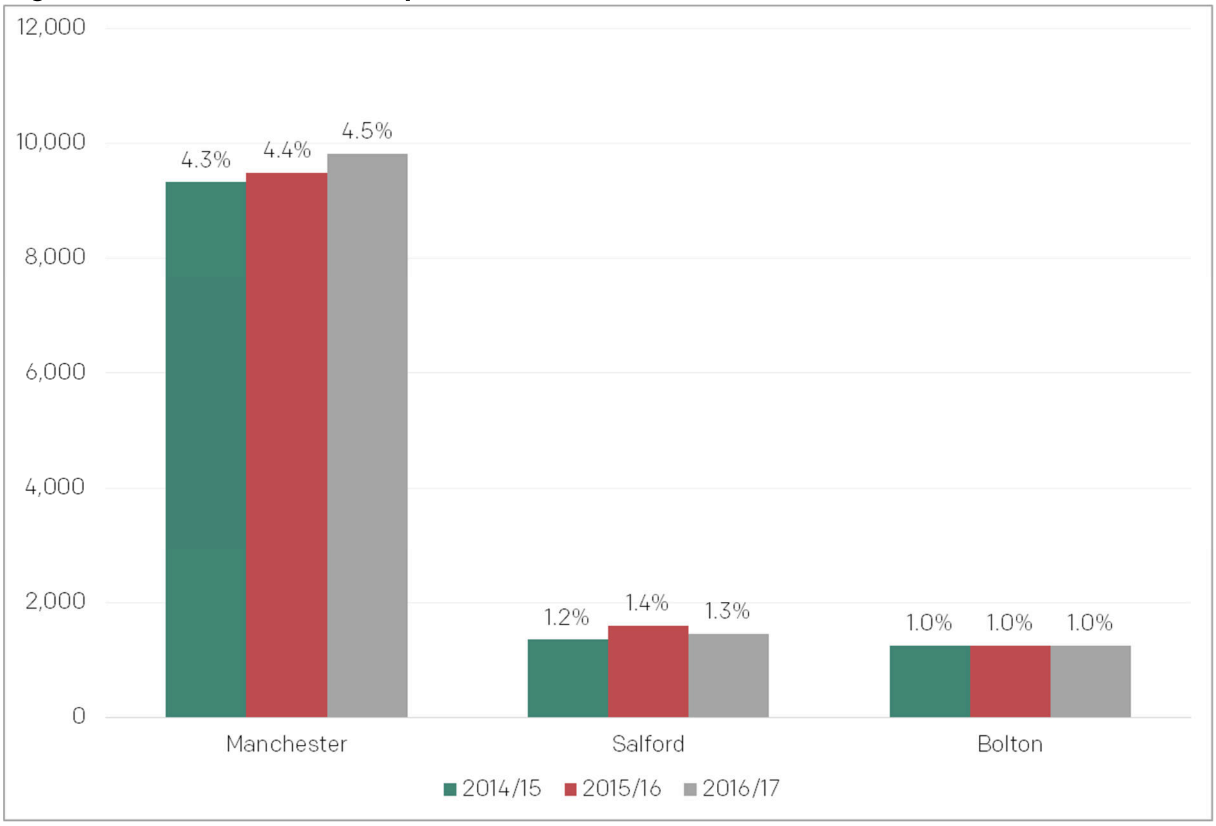
[79] Higher Education Statistics Authority (HESA)

Figure 6.9: Mainstream exemptions in Council tax 2014/15 to 2016/17*



Source: MHCLG Council tax Base Local Authority Level: Council tax Base (CTB) Supplementary Form

** Labels are percentages of total housing stock*

Manchester

6.86 The student housing market in Manchester has shifted north towards the city centre - into the Oxford Road Corridor area - away from the traditional student neighbourhoods in south Manchester over recent years. The ongoing rationalisation of Manchester Metropolitan University's 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 HESA data between 2010/11 and 2014/15 shows the proportion of the total number of students living in the City Centre, Hulme and Ardwick wards (combined) increased from 30.8% to 34.5%. In the same period the proportion of students living in Withington, Old Moat, Didsbury East, Didsbury West, Levenshulme and Fallowfield fell from 34.3% to 31.8%.

6.88 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 6.6 shows the number of students occupying accommodation in the city centre apartment market.

Table 6.6: Mainstream student exemptions within the Manchester city centre apartment market

	2014/15	2015/16	2016/17
No. of Student Exemptions	2,653	2,748	2,727

Source: Manchester City Council

Salford

6.89 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. This increase coincides with falling numbers of student households in mainstream accommodation across Salford. In March 2017, there were 1,459 recorded as student exempt on Council tax, a 9% decrease since March 2016 and a 21% decrease from a peak in March 2011.[80]

6.90 Despite the fall in the overall number, 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

6.91 Students studying at the University of Bolton are much more likely to live at home during term time, with approximately 50% of students living at home during the 2013/14 academic year compared to just 19.6% of students studying at the other four main HEIs in Greater Manchester.[81]

[80] Salford Campus Plan (2011)

[81] Bolton Student Housing Survey 2016

6.92 The total number of student households in the mainstream market in Bolton has remained fairly constant since 2015, with approximately 1,250 properties listed as student exempt on Council tax. Traditionally, student households have been concentrated in the terraced housing stock in neighbourhoods close to the University's campus. However, increasing numbers of students are occupying purpose built student accommodation in the town centre, following the completion of a number of these schemes over the last five years.

Trafford

6.93 A new university 'UA92' is planned in Stretford in Trafford. As part of this proposal purpose built student accommodation will be delivered in phases from 2020. This purpose-built accommodation is expected to house around one third of the anticipated students at this new facility.

Summary

6.94 The spatial distribution of students is not expected to alter greatly in the foreseeable future in Greater Manchester. The need of students is expected to be met predominantly in Manchester, Salford and Bolton and within Trafford in the future.

6.8 Family housing

6.95 In 2015 Greater Manchester had just under 350,000 households with dependent children, 169,000 of these households contained just one dependent child and 61,000 contained three or more children (Table 6.7). By 2035, the number of dwellings in Greater Manchester containing any dependent children is expected to rise to just over 383,000, a rise of 9.6% or an actual change of 33,000. Most of this increase is in households with only one child (18.1%) and there is expected to be a slight decline in the number of households with two dependent children.

6.96 In the North West as a whole, the total rise in households with dependent children is expected to be 7.5%, as opposed to 12.7% nationally by 2035. Interestingly, all the rise in the North West is in households with one child and households with two and over three children are all expected to decrease. Nationally, all the groups of dependent children are all expected to increase with one child households increasing the most at 21.4%.

Table 6.7: Number of households with dependent children 2015 and 2035

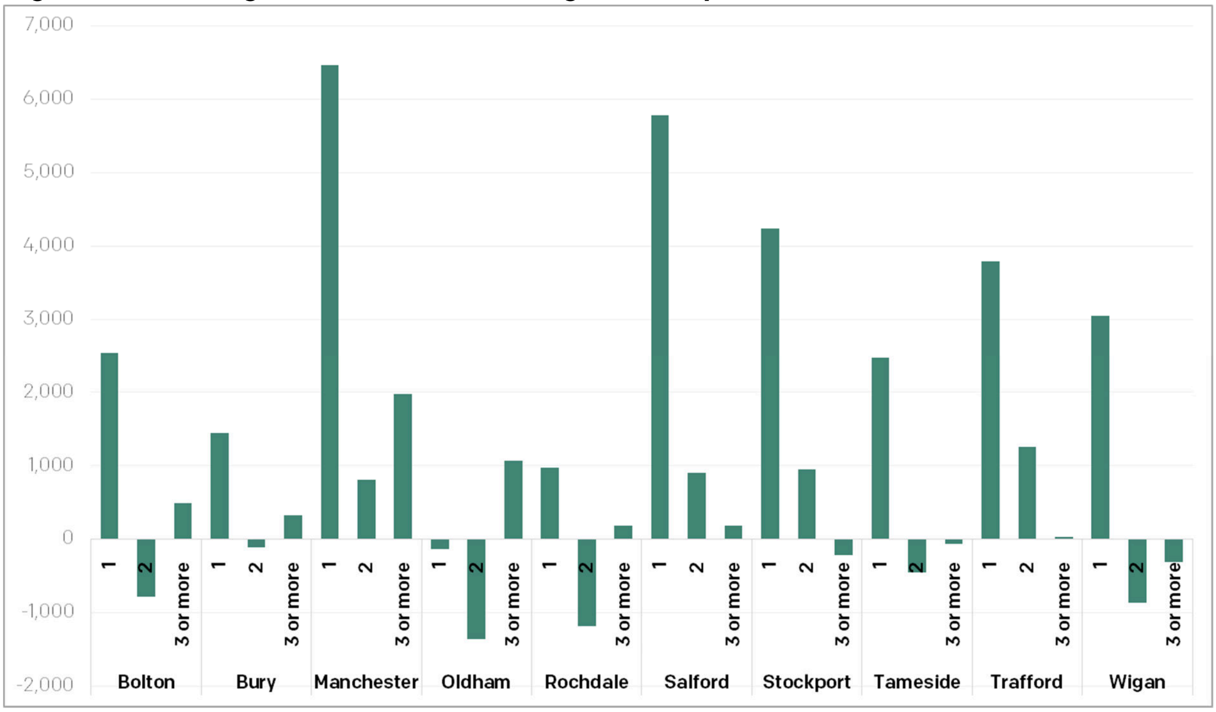
Area	Number of dependent children	Number of households 2015	Number of households 2035	Change in number of households 2015 to 2035	% Change in number of households 2015 to 2035
Greater Manchester	1	169,153	199,774	30,621	18.1
	2	120,168	119,334	-834	-0.7
	3 or more	61,002	64,684	3,682	6.0
	All	350,323	383,792	33,469	9.6
North West	1	427,640	502,387	74,747	17.5
	2	311,166	306,781	-4,385	-1.4
	3 or more	137,987	133,060	-4,927	-3.6
	All	876,793	942,228	65,435	7.5
England	1	3,066,225	3,723,059	656,834	21.4
	2	2,469,230	2,610,872	141,642	5.7
	3 or more	1,086,862	1,132,622	45,760	4.2
	All	6,622,317	7,466,553	844,236	12.7

Source: MHCLG Household Projections 2014

6.97 Figure 6.10 below shows forecast change in households with one, two and three or more children. 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.

6.98 When this is broken down by the number of dependent children, Manchester, Salford and Trafford again are expected to experience an increase in all dependent children groups (i.e. one child, two children and over three children). Oldham is only expected to increase the number of households with over 3 children (15.5%) and the increase in Tameside is only in the number of households with one child (16.5%). The highest increases are expected in households with one child in Salford (37.1%), Trafford (26.3%) and Stockport (24%).

Figure 6.10: Change in number of dwellings with dependent children 2015 and 2035



Source: ONS Household Projections 2014

6.9 Armed Forces

6.99 Serving and former members of the armed forces and their families are covered by the Armed Forces Covenant, published by Government 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.[82] The covenant is a commitment to ensure fair treatment of members of the armed forces in many aspects of civilian life, including housing.

Serving members of the armed forces

6.100 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

[82] GMCA Press Release, [£232,000 BOOST FOR FORCES PERSONNEL, FAMILIES AND VETERANS IN GREATER MANCHESTER](), 30 June 2017

Defence statistics show that around 78% of serving personnel are housed in this type of accommodation.[83]

6.101 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.[84]

Ex-service personnel

6.102 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;[85]
- Government funded shared ownership: ex-service personnel and surviving partners are given priority for these schemes for 2 years after service;[86] and
- Accessing social housing through housing registers and housing associations.

Access to social housing for ex-service personnel

6.103 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 make reference to ex-service personnel in their allocations policies, with provisions to award higher need and forego local connection criteria.

[83] House of Commons Library Briefing Paper: Armed Forces Housing, June 2017
[84] Armed Forces: Housing: Written question – 68441, http://www.parliament.uk/written-questions-answers-statements/written-question/commons/2017-03-20/68441
[85] https://www.gov.uk/guidance/forces-help-to-buy
[86] The Armed Forces Covenant Annual Report, 2016

6.104 Over the period 2012 to 2015, around 2% of all social housing lets in Greater Manchester have been to households with members that have served in the armed forces. There is no particular spatial pattern of armed forces lets in Greater Manchester. Generally, over the period 2012/13 to 2014/15 Manchester and Tameside had relatively high numbers of armed forces lets compared to the rest of Greater Manchester and Trafford had the least.[87]

6.105 Armed forces lets have predominantly been to single people and families (two adults and at least one child) since 2012. However in 2014/15, a number of lets went to older households, both single older people and couples.

6.106 In 2015 Manchester City Council gifted 15 empty properties to Haig Housing, a housing trust accommodating ex-service personnel and their families. These were refurbished with the help of BBC's *DIY SOS* programme to create a Veterans Village, including support services and temporary accommodation.[88]

Supported housing for the armed forces

6.107 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.

[87] CORE (COntinuous REcording) of Lettings and Sales by Registered Providers
[88] Haig Housing Trust http://www.haighousing.org.uk/properties/estates-details?Estate_ID=MANCNEW

6.10 Gypsies and Travellers

6.108 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.

6.109 A comprehensive Gypsy and Traveller Accommodation Assessment (GTAA)[89] 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[90] and included a desktop review of relevant data sources and careful fieldwork observations across sites/yards[91] in Greater Manchester.

6.110 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 which applies to those who follow a nomadic habit of life, as compared with a broader 'cultural' definition.

6.111 The 2018 study provides analysis of households likely to meet this PPTS 2015 definition (on the basis of the travelling practices) and which households do not (because they do not travel) but instead are included within a broader cultural definition.

6.112 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.

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[89] Gypsy and Traveller and Travelling Showperson Accommodation Assessment (GTAA) arc4 (2014). Available at: https://gmsf-consult.objective.co.uk/file/3651006

[90] Gypsy and Traveller and Travelling Showperson Accommodation Assessment Update (GTAA Update) arc4 (2018). Available at: https://www.greatermanchester-ca.gov.uk/media/1678/greater-manchester-gypsy-and-traveller-and-travelling-showperson-accommodation-assessment-update-2018.pdf

[91] "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.

Current provision

6.113 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 a total of 182 occupied pitches in Greater Manchester which accommodate a total of 182 households. In terms of yard provision for Travelling Showpeople, there are a total of 345 plots comprising 177 plots on yards owned by local authorities and 168 plots on permanent private yards. A total of two plots were identified as empty but are assumed to be unavailable for letting as they are likely to be licenced to particular households.

Table 6.8: Current provision of Traveller Pitches and Travelling Showperson plots

	Permanent Local Authority / Housing Association	Permanent Private	Temporary Private	Unauth-orised	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[4] 2018 GTAA

6.114 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

6.115 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).

6.116 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.

6.117 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 of need. 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 6.9: Future provision of pitches and plots 2017/18 to 2035/36

	2017/18 to 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

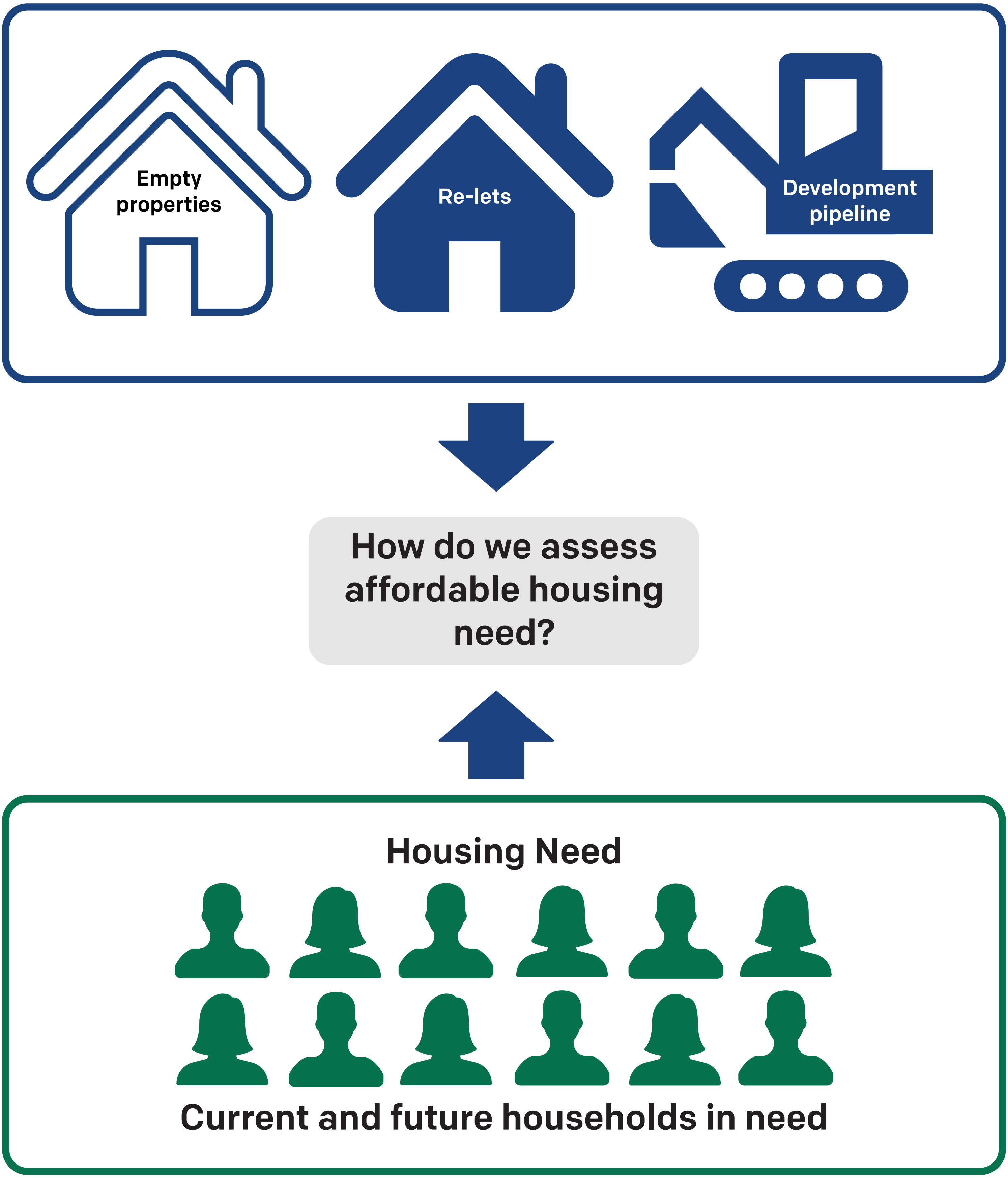
Source: arc[4] 2018 GTAA

6.118 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.

6.119 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 as a whole.

The full 2018 GTAA Update provides a detailed analysis on current and future need by district, and is available at:
https://www.greatermanchester-ca.gov.uk/media/1678/greater-manchester-gypsy-and-traveller-and-travelling-showperson-accommodation-assessment-update-2018.pdf

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 accommodation or overcrowded, what household incomes might be and the future costs of renting and buying property, across different parts of Greater Manchester.

The 'answer' we come to is a total annual need figure for affordable housing of 4,678 households. That is not a target for building new affordable house building through the planning system, but it is something we need to consider in developing the Greater Manchester Spatial Framework 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 4,678 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 local housing need) 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 house building but a check to understand likely future demand. Besides delivery of affordable housing on mixed-tenure development schemes, there are also a number of other mechanisms which could deliver affordable housing. These include a wide range of funding programmes from Homes England, including their Shared Ownership and Affordable Homes Programme and funding for specialist forms of affordable housing, such as extra care provision. Other sources such as Community Land Trusts 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 private rented sector (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 Local Housing Allowance. 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. Government recognises 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 PPG[92] requires a SHMA to calculate "affordable housing need" 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 by Government for the purposes of this calculation as:

> *social rented, affordable rented and intermediate housing, provided to eligible households whose needs are not met by the market.*

7.9 PPG provides guidance on calculating affordable housing need, replacing the 2007 SHMA Practice Guidance,[93] stating that local authorities need to:

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[92] PPG, Housing and economic development needs assessment. First published in March 2014 and subject to on-going updates - latest September 2018. Available at: https://www.gov.uk/guidance/housing-and-economic-development-needs-assessments#affordable-housing

[93] Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/11813/Strategic_Housing_Market_Assessments-_Annexes.pdf

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: 022 Reference ID: 2a-022-20180913)

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.

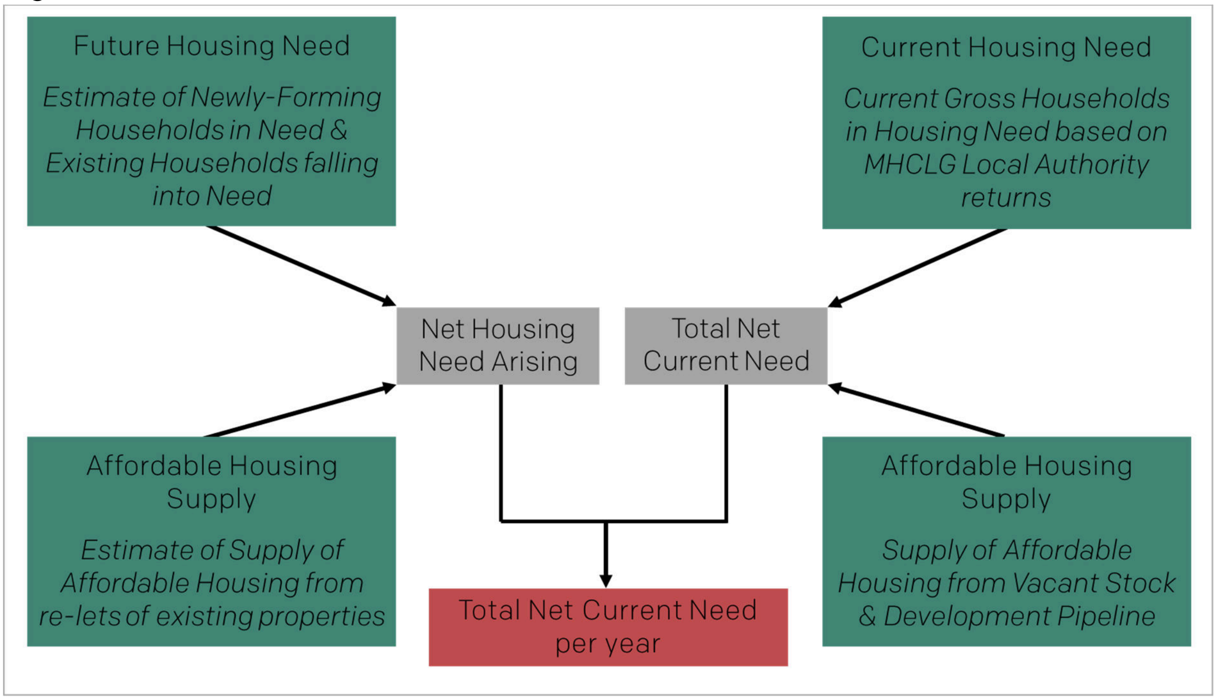
7.11 The PPG suggests that housing registers can inform estimate levels of affordable housing need. The allocations policies of districts can however vary considerably in their approaches to awarding banding and points to households on housing registers. This makes it difficult to use a housing register 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 sets out the different types of households that are considered to be in housing need as follows:

- homeless households or insecure tenure (e.g. housing that is too expensive compared to disposable income);
- households where there is a mismatch between the housing needed and the actual dwelling (e.g. overcrowded households);
- households containing people with social or physical impairment or other specific needs living in unsuitable dwellings (e.g. accessed via steps) which cannot be made suitable in-situ;
- households that lack basic facilities (e.g. a bathroom or kitchen) and those subject to major disrepair or that are unfit for habitation; and
- households containing people with particular social needs (e.g. escaping harassment) which cannot be resolved except through a move.

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 the ten Greater Manchester districts to bring together relevant sources of data at the time of analysis.

7.3 Stages of the assessment

7.15 The PPG sets out the following broad 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 Greater Manchester districts use a housing register to record households who have expressed an interest in living in accommodation managed by the local authority or registered providers.

7.17 Local authorities report these statistics to MHCLG, which are then compiled into a national statistical data return.[94] The figures for Greater Manchester are shown in Table 7.1 and 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 four districts providing revised data as indicated below.

Table 7.1: Total current unmet housing need (gross backlog)

Area	Total households on the housing waiting list in a reasonable preference category
Bolton*	3,261
Bury	691
Manchester	4,697
Oldham	3,858
Rochdale*	1,118
Salford	6,677
Stockport	2,935
Tameside*	4,040
Trafford	1,163
Wigan*	1,510
Greater Manchester	29,905

*Source: MHCLG Local Authority Return – Section C – Allocations 2016/17 Published January 2018. Districts marked with an * are district own figures*

[94] https://www.gov.uk/government/statistical-data-sets/local-authority-housing-statistics-data-returns-for-2015-to-2016

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

7.19 Stage 2 of the needs 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 (2014-based projections being the last produced by the MHCLG before responsibility transferred to the Office for National Statistics in January 2017), and that we should use a gross figure.

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.[95] To put it more simply, whatever else is happening in terms of overall household change, a person aged 15 in 2016 will 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 2016 and 2026. When divided by

[95] 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).

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 7.2).

Table 7.2: Gross household formation rates 2016 to 2026

Area	Annual Formation Rate
Bolton	1,942
Bury	1,235
Manchester	4,744
Oldham	1,367
Rochdale	1,328
Salford	1,761
Stockport	1,825
Tameside	1,452
Trafford	1,401
Wigan	2,048
Greater Manchester	19,103

Source: MHCLG, 2014 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 Valuation Office Agency (VOA) rental cost data has been used (Table 7.3).

Table 7.3: Indicative cost of housing in Greater Manchester

Area	Lower Quartile House Price (Qtr. 3 2016)*	Lower Quartile Valuation Office Agency Monthly Rent**
Bolton	£85,000	£430
Bury	£108,750	£475
Manchester	£110,000	£500
Oldham	£85,000	£450
Rochdale	£85,000	£425
Salford	£102,000	£490
Stockport	£136,000	£550
Tameside	£95,000	£450
Trafford	£166,500	£625
Wigan	£85,000	£400
Greater Manchester	£105,825	£450

*Source: *ONS Lower Quartile House Price data by Local Authority, Table 6a*
https://www.ons.gov.uk/peoplepopulationandcommunity/housing/datasets/ratioofhousepricetoworkplacebasedearningslowerquartileandmedian
*** VOA https://www.gov.uk/government/statistics/private-rental-market-statistics-may-2016 (Table 2.7: Summary of monthly rents recorded between 1 April 2015 and 31 March 2016)*

7.26 The 2007 SHMA Guidance considers a household is able to afford to buy a home if the price is no more than 3.5 times their gross household income. This, however, does not take into account 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 7.4.

Table 7.4: 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 (third of annual income)
Bolton	£24,286	£17,200
Bury	£31,071	£19,000
Manchester	£31,429	£20,000
Oldham	£24,286	£18,000
Rochdale	£24,286	£17,000
Salford	£29,143	£19,600
Stockport	£38,857	£22,000
Tameside	£27,143	£18,000
Trafford	£47,571	£25,000
Wigan	£24,286	£16,000
Greater Manchester	£30,236	£18,000

Source: Based on ONS and VOA data

7.27 Taking this into account, households with a household income of under £18,000 at the Greater Manchester level could be judged as unable to buy or rent in the market. However, in reality there are substantial differences at district level, highlighted in the table above.

7.28 CACI 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 7.5.

Table 7.5: Number of current households assumed to be unable to access the housing market in Greater Manchester, 2016

Area	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	120,373	43,477	36%
Bury	80,751	26,166	32%
Manchester	225,033	103,649	47%
Oldham	94,270	35,640	38%
Rochdale	90,587	32,945	37%
Salford	113,407	47,847	43%
Stockport	127,333	43,825	35%
Tameside	98,235	36,351	37%
Trafford	99,908	36,691	37%
Wigan	142,369	43,043	30%
Greater Manchester	1,192,266	449,635	38%

Source CACI Paycheck (2016): Household Banding

Step 2.3: Existing households falling into need

7.29 The 2007 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 7.6: 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	2,954	190	730	920	2,034	292	715	1,007	1,027
Bury	1,235	440	111	551	684	89	222	311	373
Manchester	5,122	696	950	1,646	3,476	404	1,183	1,587	1,889
Oldham	1,799	187	291	478	1,321	253	483	736	585
Rochdale	2,699	331	560	891	1,808	240	646	886	922
Salford	2,938	220	623	843	2,095	865	551	1,416	679
Stockport	1,564	255	181	436	1,128	194	451	645	483
Tameside	2,417	59	445	504	1,913	208	823	1,031	882
Trafford	1,247	91	311	402	845	109	259	368	477
Wigan	2,736	554	119	673	2,063	391	697	1,088	975
Greater Manchester	24,711	3,023	4,321	7,344	17,367	3,045	6,030	9,075	8,292

Source: CORE Lettings data 2015/16 https://www.gov.uk/government/statistics/social-housing-lettings-in-england-april-2015-to-march-2016

**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 2015 to 31 March 2016 has been used to estimate the number of existing households falling into need in 2015/16 as 8,300 across Greater Manchester, shown as step 2.3 in Table 7.6 (above).

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 15,580 people classed as newly arising housing need per year.

7.33 Table 7.7 illustrates the calculation of the gross annual arising housing need:

Table 7.7: 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	1,942	0.36	1,027	1,728
Bury	1,235	0.32	373	774
Manchester	4,744	0.47	1,889	4,136
Oldham	1,367	0.38	585	1,106
Rochdale	1,328	0.37	922	1,409
Salford	1,761	0.43	679	1,438
Stockport	1,825	0.35	483	1,117
Tameside	1,452	0.37	882	1,421
Trafford	1,401	0.37	477	996
Wigan	2,048	0.30	975	1,599
Greater Manchester	19,103	0.38	8,292	15,580

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 2007 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 is shown in the table below, taken from MHCLG Local Authority Housing Statistics[96] and Statistical Data Returns.[97] It must be noted that 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.

[96] Available at: https://www.gov.uk/government/statistical-data-sets/local-authority-housing-statistics-data-returns-for-2013-to-2014
[97] Available at: https://www.gov.uk/government/statistics/statistical-data-return-2013-to-2014

Table 7.8: 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	% of vacant stock
Bolton	0	0	20,850	156	20,850	156	0.7
Bury	8,052	6	3,727	13	11,779	19	0.2
Manchester	16,306	3	46,708	121	63,014	124	0.2
Oldham	2,066	19	17,295	39	19,361	58	0.3
Rochdale	0	0	18,763	272	18,763	272	1.4
Salford	1,241	0	27,247	134	28,488	134	0.5
Stockport	11,340	0	4,281	27	15,621	27	0.2
Tameside	0	0	19,864	47	19,864	47	0.2
Trafford	0	0	11,747	86	11,747	86	0.7
Wigan	22,268	6	1,984	26	24,252	32	0.1
Greater Manchester	61,273	34	172,804	921	234,077	955	0.4

Source: MHCLG https://www.gov.uk/government/statistical-data-sets/local-authority-housing-statistics-data-returns-for-2015-to-2016*

***https://www.gov.uk/government/statistics/statistical-data-return-2015-to-2016*

7.38 Table 7.8 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 registered providers 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 be included. This data has been provided primarily via the Homes England statistical returns unless otherwise stated.

Table 7.9: Committed supply of new affordable units

Area	Total Affordable Starts on Site 2016/17
Bolton	151
Bury	204
Manchester	372
Oldham	14
Rochdale	125
Salford*	685
Stockport	259
Tameside	142
Trafford	57
Wigan	76
Greater Manchester	2,085

*Source: Homes England 2016/17; * District own data October 2017*
https://www.gov.uk/government/statistics/housing-statistics-1-april-2016-to-31-march-2017

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 7.10: 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	151	0	151
Bury	0	0	204	0	204
Manchester	0	0	372	0	372
Oldham	0	0	14	0	14
Rochdale	0	0	125	0	125
Salford	0	0	685	0	685
Stockport	0	0	259	0	259
Tameside	0	0	142	0	142
Trafford	0	0	57	0	57
Wigan	0	0	76	0	76
Greater Manchester	0	0	2,085	0	2,085

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 on the basis of 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 for 2012/13, 2013/14, 2014/15 and 2015/16 and includes local authority and RP (mainly housing association) properties at both social and affordable rent levels.

Table 7.11: Estimating annual supply of social re-lets: average 2012/13, 2013/14, 2014/15 and 2015/16

Area	Total Count	LA General Needs tenancy	PRP General needs tenancy	Supported housing	Lets to Existing Social Tenants	Re-lets to new household
Bolton	2,945	284	666	150	1,099	1,845
Bury	1,347	518	118	101	738	609
Manchester	6,232	908	1,102	377	2,387	3,845
Oldham	2,163	320	321	71	711	1,452
Rochdale	2,096	267	417	112	795	1,301
Salford	3,217	371	716	106	1,193	2,024
Stockport	1,569	307	152	53	512	1,057
Tameside	2,444	93	507	147	747	1,697
Trafford	1,254	116	280	78	473	781
Wigan	2,714	641	123	95	859	1,855
Greater Manchester	25,980	3,824	4,401	1,289	9,514	16,466

Source: CORE lettings data 2012/13, 2013/14, 2014/15 and 2015/16

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 and resales of these properties are the most common source of intermediate affordable housing.

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 7.12: 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	1,845	0	1,845
Bury	609	0	609
Manchester	3,845	0	3,845
Oldham	1,452	0	1,452
Rochdale	1,301	0	1,301
Salford	2,024	0	2,024
Stockport	1,057	0	1,057
Tameside	1,697	0	1,697
Trafford	781	0	781
Wigan	1,855	0	1,855
Greater Manchester	16,466	0	16,466

Source: CORE

Stage 4 Estimate of net additional affordable housing requirement

7.45 The PPG advises that the total need for affordable housing is 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 7.13: Estimate of net additional affordable housing requirements

Area	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	3,065	613	496
Bury	487	97	263
Manchester	4,325	865	1,156
Oldham	3,844	769	422
Rochdale	993	199	307
Salford	5,992	1,198	613
Stockport	2,676	535	595
Tameside	3,898	780	503
Trafford	1,106	221	446
Wigan	1,434	287	31
Greater Manchester	27,820	5,564	4,678

7.46 Table 7.13 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 4,678 per year. At district level this ranges from 31 in Wigan to 1,156 in Manchester.

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 7.14: Summary of Affordable Housing Needs Assessment by Greater Manchester district

	Bolton	Bury	Manchester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan	Greater Manchester
Step 1 – Estimated Current Unmet Housing Need (Gross Backlog)											
1 Total current housing need (gross)	3,216	691	4,697	3,858	1,118	6,677	2,935	4,040	1,163	1,510	29,905
Step 2 – Assumed Future Housing Need (Net Annual)											
2.1 New Household formation	1,942	1,235	4,744	1,367	1,328	1,761	1,825	1,452	1,401	2,048	19,103
2.2 Proportion of households unable to buy	0.36	0.32	0.47	0.38	0.37	0.43	0.35	0.37	0.37	0.30	0.38
2.3 Existing households falling into need	1,027	373	1,889	585	922	679	483	882	477	975	8,292
2.4 Total newly arising need (gross per year) = (2.1 x 2.2) + 2.3	1,728	774	4,136	1,106	1,409	1,438	1,117	1,421	996	1,599	15,580
Step 3 – Estimated Affordable Housing Supply (Net Annual)											
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	151	204	372	14	125	685	259	142	57	76	2,085
3.4 Units to be taken out of management	0	0	0	0	0	0	0	0	0	0	0
3.5 Total affordable housing stock available = 3.1 + 3.2 + 3.4 - 3.4	151	204	372	14	125	685	259	142	57	76	2085
3.6 Annual supply of social re-lets (net)	1,845	609	3,845	1,452	1,301	2,024	1,057	1,697	781	1,855	16,466
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
3.8 Annual supply of affordable housing = 3.6 + 3.7	1,845	609	3,845	1,452	1,301	2,024	1,057	1,697	781	1,855	16,466
Step 4 – Estimated Total Housing Need (Net Annual)											
Total net need = 1 - 3.5	3,065	487	4,325	3,844	993	5,992	2,676	3,898	1,106	1,434	27,820
Annual flow (20% of total net need)	613	97	865	769	199	1,198	535	780	221	287	5,564
Net annual housing need = (2.4 + Annual flow) - 3.8	496	263	1,156	422	307	613	595	503	446	31	4,678

8 Appendices

8.1 This section provides supporting material for the chapter contents including data for Greater Manchester districts.

8.1 Characteristics of the Housing Market Area appendices

Population

Table 8.1: Population by age band, Greater Manchester districts, 2016

Age	Area										
	Bolton	Bury	Manchester	Oldham	Rochdale	Salford	Stockport	Tameside	Trafford	Wigan	Greater Manchester
0-4	19,621	12,330	39,207	16,919	15,175	17,614	18,062	14,703	14,997	18,767	187,395
5-9	19,447	12,545	35,163	16,941	15,004	16,238	18,079	14,424	16,337	19,888	184,066
10-14	17,257	11,379	28,806	15,736	13,244	13,269	16,345	12,620	15,134	18,226	162,016
15-19	17,488	10,667	35,571	14,893	13,273	13,506	15,868	12,388	13,267	17,774	164,695
20-24	17,263	10,004	68,105	13,854	13,013	18,899	14,288	12,851	10,752	18,043	197,072
25-29	18,946	12,272	63,952	15,964	14,862	22,551	17,219	15,049	13,016	20,815	214,646
30-34	18,395	12,126	51,318	15,922	14,444	21,653	17,711	14,710	15,344	20,674	202,297
35-39	16,994	11,706	39,184	14,331	13,603	17,078	18,608	13,475	16,738	19,249	180,966
40-44	18,026	12,074	30,838	14,237	13,564	15,061	18,789	14,027	16,973	20,883	174,472
45-49	20,418	14,005	30,379	16,325	15,307	15,990	21,269	16,549	17,646	25,411	193,299
50-54	19,593	13,845	27,530	15,432	14,722	16,022	21,688	16,875	17,722	24,571	188,000
55-59	17,031	11,878	22,633	13,563	13,342	13,795	19,014	14,492	14,507	20,658	160,913
60-64	14,661	10,126	18,333	11,733	11,720	10,963	16,468	12,075	11,933	17,755	135,767
65-69	15,633	10,832	16,269	11,865	11,434	11,312	17,063	12,812	11,905	20,079	139,204
70-74	11,837	8,293	11,323	9,099	8,361	8,510	13,377	9,685	9,158	15,922	105,565
75-79	8,924	6,291	9,317	6,959	6,312	6,728	10,698	7,188	7,468	11,102	80,987
80-84	6,018	4,326	6,844	4,612	4,520	4,811	8,214	4,896	5,840	7,125	57,206
85-89	3,555	2,506	4,140	2,754	2,719	2,931	5,051	2,778	3,857	4,054	34,345
90+	2,008	1,464	2,351	1,585	1,546	1,795	2,746	1,592	2,079	2,064	19,230
Total	283,115	188,669	541,263	232,724	216,165	248,726	290,557	223,189	234,673	323,060	2,782,141

Source: ONS Population Estimates Analysis Tool, Mid-2016

Population Projections

Table 8.2: Male population change 2016-2036

Area	2016	2036	Change	Percentage change
Bolton	140,440	148,039	7,599	5.4%
Bury	92,399	96,831	4,432	4.8%
Manchester	274,020	315,898	41,878	15.3%
Oldham	114,295	123,927	9,632	8.4%
Rochdale	106,402	112,056	5,654	5.3%
Salford	125,006	145,279	20,273	16.2%
Stockport	141,855	154,717	12,862	9.1%
Tameside	109,506	114,694	5,188	4.7%
Trafford	114,613	127,250	12,637	11%
Wigan	161,301	166,303	5,002	3.1%
Greater Manchester	1,379,837	1,504,994	125,157	9.1%
North West	3,563,200	3,780,100	216,900	6.1%
England	27,300,900	30,269,500	2,968,600	10.9%

Source: ONS 2016-based subnational population projections for local authorities and higher administrative areas in England

Table 8.3: Female population change, 2016-2036

Area	2016	2036	Change	Percentage change
Bolton	143,096	150,711	7,615	5.3%
Bury	96,104	100,987	4,883	5.1%
Manchester	267,299	302,574	35,275	13.2%
Oldham	118,054	127,490	9,436	8%
Rochdale	109,948	116,057	6,109	5.6%
Salford	123,115	140,074	16,959	13.8%
Stockport	147,966	159,725	11,759	7.9%
Tameside	113,603	119,065	5,462	4.8%
Trafford	119,597	132,260	12,663	10.6%
Wigan	162,225	167,018	4,793	3%
Greater Manchester	1,401,007	1,515,961	114,954	8.2%
North West	3,660,800	3,846,900	186,100	5.1%
England	27,967,100	30,636,000	2,668,900	9.5%

Source: ONS 2016-based subnational population projections for local authorities and higher administrative areas in England

Table 8.4: Net internal migration 2016-2036

Area	Migration
Bolton	-12.1
Bury	0.4
Manchester	-89.4
Oldham	-13.9
Rochdale	-7.3
Salford	-12.0
Stockport	18.7
Tameside	3.2
Trafford	14.8
Wigan	5.4
Greater Manchester	-91.2
North West	17.2

Source: ONS 2016-based subnational population projections for local authorities and higher administrative areas in England

Flows are to/from area stated and other areas of England

BME communities

Table 8.5: Population by ethnic group, 2011

Area	White	Mixed/ multiple ethnic group	Asian/ Asian British	Black/ African/ Caribbean/ Black British	Other ethnic group	Total
Bolton	226,645	4,892	38,749	4,652	1,848	276,786
Bury	165,032	3,365	13,407	1,893	1,363	185,060
Manchester	335,109	23,161	85,986	43,484	15,387	503,127
Oldham	174,326	4,057	43,165	2,797	552	224,897
Rochdale	172,874	3,569	31,630	2,770	856	211,699
Salford	210,862	4,616	9,429	6,541	2,485	233,933
Stockport	260,819	5,104	13,762	1,958	1,632	283,275
Tameside	199,429	3,159	14,553	1,784	399	219,324
Trafford	193,834	6,031	17,973	6,540	2,200	226,578
Wigan	309,193	2,756	3,519	1,678	703	317,849
Greater Manchester	2,248,123	60,710	272,173	74,097	27,425	2,682,528
North West	6,361,716	110,891	437,485	97,869	44,216	7,052,177
England and Wales	48,209,395	1,224,400	4,213,531	1,864,890	563,696	56,075,912

Source: Census 2011

Table 8.6: Tenure by ethnicity of head of household, 2011- White

Area	All tenures	Owned outright	Owned with a mortgage or loan or shared ownership	Social rented	Private rented or living rent free
Bolton	101,781	31,449	34,801	20,970	14,561
Bury	72,251	23,801	27,315	10,809	10,326
Manchester	150,986	25,872	36,049	47,772	41,293
Oldham	77,249	24,453	27,120	16,004	9,672
Rochdale	77,532	22,227	26,477	17,736	11,092
Salford	94,971	21,892	28,154	27,265	17,660
Stockport	115,434	41,506	44,322	15,931	13,675
Tameside	89,334	25,447	31,867	19,427	12,593
Trafford	84,155	28,413	31,679	13,244	10,819
Wigan	133,459	42,024	49,478	25,066	16,891
Greater Manchester	997,152	287,084	337,262	214,224	158,582
North West	2,799,769	895,568	959,699	503,269	441,233
England and Wales	20,900,820	6,835,337	7,063,569	3,497,425	3,504,489

Source: Census 2011

Table 8.7: Tenure by ethnicity of head of household, 2011- Mixed/multiple ethnic groups

Area	All tenures	Owned outright	Owned with a mortgage or loan or shared ownership	Social rented	Private rented or living rent free
Bolton	1,274	141	321	415	397
Bury	797	91	282	191	233
Manchester	6,348	348	1,086	2,835	2,079
Oldham	896	95	246	347	208
Rochdale	912	85	222	363	242
Salford	1,342	93	296	491	462
Stockport	1,140	139	453	254	294
Tameside	773	86	254	235	198
Trafford	1,280	143	418	423	296
Wigan	676	97	241	167	171
Greater Manchester	15,438	1,318	3,819	5,721	4,580
North West	29,510	3,097	7,848	9,913	8,652
England and Wales	301,295	32,159	78,409	96,469	94,258

Source: Census 2011

Table 8.8: Tenure by ethnicity of head of household, 2011- Asian/Asian British

Area	All tenures	Owned outright	Owned with a mortgage or loan or shared ownership	Social rented	Private rented or living rent free
Bolton	10,824	3,635	3,860	1,466	1,863
Bury	3,738	804	1,746	359	829
Manchester	25,531	3,569	7,388	4,340	10,234
Oldham	10,010	2,488	3,706	1,816	2,000
Rochdale	7,766	1,921	3,215	1,430	1,200
Salford	3,451	472	1,049	438	1,492
Stockport	3,970	907	2,112	183	768
Tameside	3,947	1,073	1,770	444	660
Trafford	5,291	1,216	2,362	515	1,198
Wigan	1,233	269	464	155	345
Greater Manchester	75,761	16,354	27,672	11,146	20,589
North West	122,792	30,569	44,291	15,457	32,475
England and Wales	1,229,370	254,384	459,122	165,906	349,958

Source: Census 2011

Table 8.9: Tenure by ethnicity of head of household, 2011- Black/African Caribbean/Black British

Area	All tenures	Owned outright	Owned with a mortgage or loan or shared ownership	Social rented	Private rented or living rent free
Bolton	1,635	101	296	659	579
Bury	803	68	302	255	178
Manchester	16,738	1,038	2,562	8,230	4,908
Oldham	1,285	132	292	641	220
Rochdale	988	56	176	565	191
Salford	2,873	57	375	1,383	1,058
Stockport	830	108	375	186	161
Tameside	750	63	233	304	150
Trafford	3,084	435	995	1,168	486
Wigan	711	29	185	312	185
Greater Manchester	29,697	2,087	5,791	13,703	8,116
North West	40,210	3,104	8,279	17,198	11,629
England and Wales	731,069	60,530	180,173	306,585	183,781

Source: Census 2011

Table 8.10: Tenure by ethnicity of head of household, 2011- Other ethnic group

Area	All tenures	Owned outright	Owned with a mortgage or loan or shared ownership	Social rented	Private rented or living rent free
Bolton	857	52	119	315	371
Bury	524	75	158	89	202
Manchester	5,366	318	646	1,505	2,897
Oldham	263	25	54	110	74
Rochdale	354	45	65	153	91
Salford	919	89	157	242	431
Stockport	605	101	280	66	158
Tameside	149	19	55	28	47
Trafford	674	115	234	135	190
Wigan	307	27	76	103	101
Greater Manchester	10,018	866	1,844	2,746	4,562
North West	17,268	1,763	3,133	4,644	7,728
England and Wales	203,490	24,544	43,687	52,076	83,183

Source: Census 2011

Table 8.11: Occupancy rating by ethnicity of head of household, 2011- White

Area	Occupancy rating of +2 or more	Occupancy rating of +1	Occupancy rating of 0	Occupancy rating of -1 or less
Bolton	31,347	39,736	27,475	3,223
Bury	25,191	27,467	17,542	2,051
Manchester	38,009	54,266	50,776	7,935
Oldham	21,455	31,349	21,532	2,913
Rochdale	23,463	29,304	22,106	2,659
Salford	26,682	36,218	28,477	3,594
Stockport	43,747	41,921	26,680	3,086
Tameside	25,270	35,779	25,339	2,946
Trafford	34,169	29,457	18,375	2,154
Wigan	45,899	52,874	31,230	3,456
Greater Manchester	315,232	378,371	269,532	34,017
North West	998,309	1,049,815	671,865	79,780
England and Wales	7,635,621	7,380,616	5,203,511	681,072

Source: Census 2011

Table 8.12: Occupancy rating by ethnicity of head of household, 2011- Mixed/multiple ethnic group

Area	Occupancy rating of +2 or more	Occupancy rating of +1	Occupancy rating of 0	Occupancy rating of -1 or less
Bolton	243	495	447	89
Bury	160	335	268	34
Manchester	984	2,024	2,750	590
Oldham	141	308	373	74
Rochdale	158	304	384	66
Salford	202	504	543	93
Stockport	286	410	389	55
Tameside	143	282	301	47
Trafford	333	431	442	74
Wigan	172	278	197	29
Greater Manchester	2,822	5,371	6,094	1,151
North West	6,306	10,562	10,834	1,808
England and Wales	55,551	92,048	125,404	28,292

Source: Census 2011

Table 8.13: Occupancy rating by ethnicity of head of household, 2011- Asian/Asian British

Area	Occupancy rating of +2 or more	Occupancy rating of +1	Occupancy rating of 0	Occupancy rating of -1 or less
Bolton	2,154	3,310	3,610	1,750
Bury	820	1,166	1,210	542
Manchester	3,613	7,406	10,218	4,294
Oldham	1,241	2,463	3,509	2,797
Rochdale	1,190	2,093	2,702	1,781
Salford	637	1,238	1,290	286
Stockport	1,235	1,284	1,104	347
Tameside	839	1,242	1,225	641
Trafford	1,488	1,709	1,537	557
Wigan	350	437	343	103
Greater Manchester	13,567	22,348	26,748	13,098
North West	24,651	37,024	41,482	19,635
England and Wales	250,347	344,661	430,680	203,682

Source: Census 2011

Table 8.14: Occupancy rating by ethnicity of head of household, 2011- Black/African Caribbean/Black British

Area	Occupancy rating of +2 or more	Occupancy rating of +1	Occupancy rating of 0	Occupancy rating of -1 or less
Bolton	207	475	707	246
Bury	177	239	331	56
Manchester	2,343	5,154	6,900	2,341
Oldham	178	389	569	149
Rochdale	113	274	447	154
Salford	299	971	1,358	245
Stockport	175	323	271	61
Tameside	108	253	306	83
Trafford	759	1,094	1,036	195
Wigan	121	240	302	48
Greater Manchester	4,480	9,412	12,227	3,578
North West	6,605	13,078	16,125	4,402
England and Wales	104,097	186,654	320,500	119,818

Source: Census 2011

Table 8.15: Occupancy rating by ethnicity of head of household, 2011- other ethnic group

Area	Occupancy rating of +2 or more	Occupancy rating of +1	Occupancy rating of 0	Occupancy rating of -1 or less
Bolton	110	311	375	61
Bury	126	173	182	43
Manchester	560	1,470	2,597	739
Oldham	36	79	127	21
Rochdale	72	99	150	33
Salford	122	300	407	90
Stockport	166	211	207	21
Tameside	27	48	54	20
Trafford	179	214	199	82
Wigan	41	108	133	25
Greater Manchester	1,439	3,013	4,431	1,135
North West	2,781	5,519	7,337	1,631
England and Wales	31,469	53,181	89,060	29,780

Source: Census 2011

Young people

Table 8.16: Number of households with non-dependent children, 2001 and 2011

Area	2001	2011
Bolton	11,083	11,880
Bury	7,826	8,177
Manchester	13,800	16,267
Oldham	8,907	9,603
Rochdale	8,402	8,916
Salford	9,461	9,504
Stockport	12,176	13,031
Tameside	9,478	10,378
Trafford	8,801	9,763
Wigan	14,852	16,057
Greater Manchester	104,786	113,576
North West	289,738	313,790
England and Wales	2,031,002	2,248,347

Source: Census 2001 and 2011

Table 8.17: Household tenure of those aged under 35, 2011

Area	All Tenures		Owned outright		Owned with a mortgage or loan or shared ownership		Social rented		Private rented or living rent free	
	Under 24	25-34	Under 24	25-34	Under 24	25-34	Under 24	25-34	Under 24	25-34
Bolton	4,431	16,501	157	891	447	6,748	1,349	3,391	2,478	5,471
Bury	2,253	10,493	73	439	242	4,719	632	1,609	1,306	3,726
Manchester	17,914	50,679	471	1,880	765	11,392	3,565	10,920	13,113	26,487
Oldham	2,905	12,886	136	927	336	5,297	1,060	2,863	1,373	3,799
Rochdale	3,376	12,613	101	605	322	5,011	1,356	3,285	1,597	3,712
Salford	5,654	20,072	125	563	403	6,062	1,521	4,779	3,605	8,668
Stockport	3,035	14,631	117	593	322	7,062	984	2,155	1,612	4,821
Tameside	3,481	13,141	99	458	417	5,638	1,255	2,955	1,710	4,090
Trafford	1,927	12,408	84	594	202	5,023	633	2,203	1,008	4,588
Wigan	4,344	18,457	124	651	623	8,750	1,444	3,818	2,153	5,238
Greater Manchester	49,320	181,881	1,487	7,601	4,079	65,702	13,799	37,978	29,955	70,600
North West	114,686	419,188	3,573	18,371	10,622	160,861	30,565	78,986	69,926	160,970
England and Wales	840,515	3,323,061	27,909	142,257	78,072	1,194,112	226,054	598,630	508,480	1,388,062

Source: Census 2011

Household characteristics

Table 8.18: Number of households by type, Greater Manchester

Year	One person households: Male	One person households: Female	Couples	A couple and one or more other adults: No dependent children	Households with one dependent child	Households with two dependent children	Households with three dependent children	Other households	Total
1995	128,393	177,372	240,593	93,851	137,997	120,813	57,571	76,460	1,033,057
1996	132,578	179,404	240,305	90,899	137,996	120,560	57,629	75,135	1,034,509
1997	136,485	181,097	240,024	87,977	137,771	120,204	57,610	73,675	1,034,842
1998	140,847	183,046	240,850	85,470	137,896	120,144	57,818	72,573	1,038,640
1999	144,839	184,502	241,210	82,893	137,772	119,801	57,839	71,574	1,040,431
2000	149,479	186,559	242,192	80,539	138,272	120,061	58,259	70,926	1,046,290
2001	154,015	188,785	243,467	78,404	138,696	120,138	58,513	70,253	1,052,269
2002	156,636	187,941	244,636	78,804	139,397	119,328	58,258	71,992	1,056,990
2003	159,724	187,390	246,401	79,325	140,479	118,721	58,151	74,045	1,064,233
2004	162,582	186,692	247,545	79,712	141,295	117,882	57,900	76,058	1,069,667
2005	165,667	186,410	248,514	80,056	142,513	117,342	57,837	78,165	1,076,504
2006	168,795	186,105	249,645	80,604	144,143	117,036	57,872	80,158	1,084,360
2007	171,438	185,502	250,456	80,659	146,034	116,962	58,026	81,755	1,090,832
2008	174,285	185,087	251,882	80,895	148,621	117,272	58,379	83,425	1,099,844
2009	177,203	184,735	253,332	81,362	151,236	117,490	58,652	85,105	1,109,112
2010	180,163	184,662	254,766	81,837	153,921	117,646	58,889	87,006	1,118,894
2011	183,127	184,556	256,105	82,344	156,839	117,939	59,208	89,023	1,129,137
2012	185,306	184,358	256,788	82,318	160,420	118,701	59,706	90,833	1,138,427
2013	187,602	183,920	257,722	82,460	163,395	119,155	60,107	92,246	1,146,609
2014	190,083	183,751	258,793	82,807	166,598	119,804	60,613	93,901	1,156,346
2015	193,248	183,728	260,474	83,412	169,153	120,168	61,002	95,946	1,167,135
2016	196,566	183,996	262,581	84,223	171,424	120,259	61,251	97,973	1,178,273
2017	199,674	184,166	264,497	84,915	173,771	120,520	61,624	99,829	1,188,996

Source: MHCLG Household Projections model (2014-based)

Table 8.19: Number of households by type, Bolton

Year	One person households: Male	One person households: Female	Couples	A couple and one or more other adults: No dependent children	Households with one dependent child	Households with two dependent children	Households with three dependent children	Other households	Total
1995	12,501	17,501	25,537	10,035	14,671	12,714	5,808	7,053	105,821
1996	12,875	17,700	25,554	9,718	14,638	12,805	5,880	6,826	105,996
1997	13,270	17,932	25,624	9,419	14,620	12,905	5,955	6,616	106,341
1998	13,711	18,205	25,839	9,165	14,642	13,031	6,041	6,439	107,072
1999	14,056	18,369	25,931	8,897	14,561	13,075	6,089	6,235	107,212
2000	14,405	18,551	26,049	8,650	14,505	13,109	6,127	6,049	107,447
2001	14,833	18,829	26,303	8,431	14,527	13,213	6,198	5,896	108,229
2002	15,204	18,808	26,505	8,484	14,633	13,134	6,213	6,017	108,997
2003	15,580	18,795	26,708	8,521	14,769	13,070	6,240	6,139	109,823
2004	15,906	18,702	26,806	8,537	14,878	12,984	6,256	6,242	110,311
2005	16,260	18,664	26,907	8,571	14,950	12,868	6,257	6,356	110,834
2006	16,651	18,664	27,026	8,610	15,120	12,823	6,288	6,485	111,667
2007	16,989	18,640	27,089	8,592	15,286	12,774	6,314	6,592	112,277
2008	17,383	18,697	27,272	8,603	15,489	12,741	6,343	6,723	113,251
2009	17,810	18,765	27,500	8,641	15,746	12,736	6,382	6,866	114,447
2010	18,217	18,850	27,674	8,670	15,990	12,717	6,410	7,005	115,534
2011	18,619	18,908	27,843	8,714	16,237	12,694	6,433	7,146	116,594
2012	18,768	18,747	27,709	8,645	16,728	12,834	6,531	7,195	117,156
2013	18,942	18,598	27,633	8,582	17,083	12,897	6,596	7,242	117,572
2014	19,183	18,574	27,651	8,562	17,311	12,866	6,613	7,323	118,082
2015	19,484	18,533	27,711	8,584	17,559	12,861	6,646	7,423	118,802
2016	19,794	18,521	27,832	8,635	17,781	12,821	6,655	7,535	119,574
2017	20,103	18,513	27,959	8,667	17,980	12,797	6,683	7,635	120,336

Source: MHCLG Household Projections model (2014-based)

Table 8.20: Number of households by type, Bury

Year	One person households: Male	One person households: Female	Couples	A couple and one or more other adults: No dependent children	Households with one dependent child	Households with two dependent children	Households with three dependent children	Other households	Total
1995	7,870	11,850	18,007	7,042	10,087	9,352	3,942	4,579	72,730
1996	8,154	11,999	18,149	6,830	10,138	9,354	3,980	4,483	73,087
1997	8,434	12,129	18,299	6,629	10,193	9,364	4,021	4,392	73,460
1998	8,730	12,270	18,525	6,462	10,280	9,404	4,075	4,315	74,061
1999	8,965	12,349	18,680	6,266	10,272	9,357	4,091	4,218	74,198
2000	9,186	12,431	18,799	6,071	10,253	9,303	4,101	4,122	74,266
2001	9,417	12,567	18,943	5,891	10,235	9,244	4,106	4,039	74,442
2002	9,634	12,612	19,096	5,915	10,234	9,165	4,102	4,115	74,874
2003	9,846	12,662	19,233	5,942	10,235	9,079	4,091	4,189	75,275
2004	10,023	12,664	19,267	5,942	10,206	8,960	4,062	4,243	75,367
2005	10,201	12,720	19,260	5,929	10,227	8,873	4,043	4,301	75,553
2006	10,472	12,836	19,387	5,965	10,249	8,792	4,026	4,391	76,118
2007	10,664	12,851	19,434	5,947	10,345	8,767	4,033	4,444	76,485
2008	10,870	12,900	19,518	5,950	10,373	8,674	4,006	4,507	76,798
2009	11,062	12,927	19,569	5,952	10,507	8,652	4,008	4,567	77,244
2010	11,313	13,024	19,698	5,976	10,590	8,596	3,993	4,651	77,842
2011	11,505	13,069	19,738	5,974	10,705	8,563	3,990	4,713	78,257
2012	11,651	13,095	19,739	5,930	10,937	8,625	4,031	4,757	78,765
2013	11,752	13,046	19,676	5,881	11,093	8,619	4,039	4,782	78,888
2014	11,923	13,087	19,701	5,870	11,273	8,649	4,065	4,836	79,404
2015	12,122	13,108	19,760	5,882	11,419	8,663	4,090	4,897	79,942
2016	12,328	13,135	19,847	5,902	11,551	8,666	4,108	4,959	80,496
2017	12,528	13,165	19,941	5,922	11,671	8,673	4,132	5,016	81,048

Source: MHCLG Household Projections model (2014-based)

Table 8.21: Number of households by type, Manchester

Year	One person households: Male	One person households: Female	Couples	A couple and one or more other adults: No dependent children	Households with one dependent child	Households with two dependent children	Households with three dependent children	Other households	Total
1995	28,877	32,579	30,543	11,674	21,225	16,819	11,434	19,864	173,016
1996	29,629	32,828	30,006	11,270	20,858	16,534	11,211	19,855	172,192
1997	30,201	32,970	29,334	10,841	20,343	16,137	10,918	19,694	170,438
1998	31,206	33,390	29,113	10,555	20,241	16,129	10,905	19,779	171,317
1999	32,228	33,890	28,928	10,268	20,198	16,093	10,845	20,065	172,516
2000	33,786	34,713	29,186	10,112	20,595	16,494	11,101	20,605	176,592
2001	35,069	35,398	29,255	9,913	20,709	16,636	11,177	20,970	179,125
2002	35,452	35,276	29,530	10,035	20,933	16,572	11,135	21,881	180,814
2003	36,052	35,293	30,036	10,211	21,310	16,632	11,177	23,010	183,720
2004	36,597	35,274	30,511	10,362	21,582	16,611	11,164	24,172	186,272
2005	37,290	35,353	31,142	10,550	22,086	16,785	11,289	25,400	189,896
2006	37,578	35,082	31,461	10,659	22,616	16,959	11,413	26,325	192,093
2007	37,713	34,738	31,661	10,735	23,210	17,188	11,588	27,035	193,867
2008	37,918	34,437	31,979	10,826	23,918	17,502	11,821	27,740	196,141
2009	38,204	34,214	32,342	10,973	24,558	17,760	12,024	28,424	198,499
2010	38,504	34,076	32,751	11,143	25,302	18,042	12,232	29,280	201,332
2011	38,889	34,027	33,218	11,332	26,179	18,403	12,495	30,277	204,819
2012	39,288	34,166	33,744	11,537	26,800	18,555	12,616	31,357	208,065
2013	39,611	34,165	34,201	11,724	27,348	18,716	12,767	32,019	210,552
2014	39,805	34,056	34,510	11,881	28,113	18,994	12,993	32,765	213,116
2015	40,328	34,157	35,121	12,097	28,760	19,233	13,204	33,795	216,695
2016	40,856	34,321	35,765	12,337	29,325	19,406	13,371	34,739	220,121
2017	41,278	34,409	36,260	12,557	29,868	19,579	13,551	35,590	223,092

Source: MHCLG Household Projections model (2014-based)

Table 8.22: Number of households by type, Oldham

Year	One person households: Male	One person households: Female	Couples	A couple and one or more other adults: No dependent children	Households with one dependent child	Households with two dependent children	Households with three dependent children	Other households	Total
1995	9,707	14,543	21,236	8,038	12,271	10,228	5,492	5,617	87,132
1996	10,007	14,721	21,168	7,827	12,422	10,349	5,588	5,462	87,545
1997	10,278	14,861	21,069	7,599	12,523	10,443	5,665	5,300	87,738
1998	10,523	14,951	21,001	7,388	12,591	10,502	5,715	5,137	87,808
1999	10,738	14,993	20,926	7,177	12,617	10,523	5,737	4,972	87,684
2000	10,969	15,061	20,880	6,983	12,681	10,581	5,770	4,820	87,745
2001	11,239	15,198	20,903	6,809	12,779	10,658	5,809	4,691	88,086
2002	11,352	15,049	20,786	6,822	12,783	10,583	5,866	4,781	88,022
2003	11,460	14,892	20,661	6,827	12,793	10,502	5,923	4,867	87,926
2004	11,600	14,769	20,578	6,849	12,831	10,439	5,992	4,962	88,021
2005	11,740	14,658	20,459	6,871	12,853	10,355	6,051	5,054	88,041
2006	11,906	14,558	20,340	6,907	12,899	10,279	6,113	5,157	88,158
2007	12,081	14,503	20,264	6,907	12,930	10,195	6,170	5,258	88,309
2008	12,240	14,407	20,200	6,910	13,031	10,162	6,259	5,353	88,562
2009	12,436	14,375	20,224	6,964	13,095	10,081	6,315	5,475	88,965
2010	12,609	14,337	20,196	7,005	13,194	10,027	6,382	5,589	89,340
2011	12,810	14,324	20,210	7,065	13,286	9,967	6,444	5,719	89,825
2012	12,971	14,328	20,189	7,080	13,452	9,971	6,546	5,831	90,367
2013	13,167	14,365	20,233	7,114	13,636	9,995	6,662	5,959	91,132
2014	13,349	14,350	20,250	7,159	13,817	10,019	6,778	6,080	91,802
2015	13,586	14,367	20,342	7,247	13,895	9,975	6,849	6,225	92,486
2016	13,834	14,413	20,449	7,338	13,941	9,910	6,904	6,375	93,164
2017	14,083	14,452	20,564	7,414	13,994	9,862	6,976	6,519	93,865

Source: MHCLG Household Projections model (2014-based)

Table 8.23: Number of households by type, Rochdale

Year	One person households: Male	One person households: Female	Couples	A couple and one or more other adults: No dependent children	Households with one dependent child	Households with two dependent children	Households with three dependent children	Other households	Total
1995	9,301	13,552	19,444	7,217	11,276	10,397	5,099	4,852	81,139
1996	9,624	13,732	19,357	7,038	11,344	10,355	5,169	4,764	81,383
1997	9,919	13,840	19,257	6,865	11,395	10,291	5,225	4,671	81,464
1998	10,250	14,005	19,250	6,727	11,487	10,249	5,287	4,602	81,858
1999	10,564	14,129	19,244	6,613	11,571	10,181	5,331	4,534	82,167
2000	10,954	14,360	19,348	6,505	11,748	10,205	5,423	4,491	83,033
2001	11,294	14,538	19,399	6,392	11,867	10,163	5,478	4,434	83,565
2002	11,498	14,546	19,405	6,402	11,954	10,072	5,470	4,515	83,861
2003	11,768	14,555	19,484	6,437	12,049	9,996	5,479	4,616	84,384
2004	11,991	14,561	19,485	6,443	12,065	9,850	5,447	4,705	84,547
2005	12,195	14,528	19,415	6,428	12,133	9,747	5,439	4,782	84,668
2006	12,461	14,551	19,443	6,448	12,210	9,652	5,435	4,882	85,083
2007	12,699	14,569	19,473	6,435	12,292	9,564	5,432	4,970	85,434
2008	12,993	14,643	19,597	6,456	12,422	9,514	5,453	5,079	86,157
2009	13,247	14,691	19,673	6,469	12,496	9,415	5,442	5,176	86,608
2010	13,456	14,717	19,679	6,456	12,605	9,336	5,438	5,260	86,947
2011	13,768	14,835	19,814	6,492	12,706	9,251	5,430	5,383	87,678
2012	13,895	14,816	19,757	6,450	12,913	9,233	5,456	5,441	87,960
2013	14,082	14,830	19,789	6,448	13,049	9,173	5,458	5,521	88,348
2014	14,294	14,870	19,826	6,453	13,213	9,140	5,475	5,609	88,880
2015	14,529	14,892	19,871	6,466	13,303	9,086	5,489	5,699	89,334
2016	14,779	14,929	19,952	6,491	13,372	9,016	5,490	5,793	89,822
2017	15,016	14,969	20,026	6,507	13,451	8,959	5,502	5,882	90,313

Source: MHCLG Household Projections model (2014-based)

Table 8.24: Number of households by type, Salford

Year	One person households: Male	One person households: Female	Couples	A couple and one or more other adults: No dependent children	Households with one dependent child	Households with two dependent children	Households with three dependent children	Other households	Total
1995	13,679	17,972	20,603	8,346	12,162	9,482	5,249	7,598	95,092
1996	14,142	18,180	20,473	8,013	12,065	9,423	5,182	7,414	94,892
1997	14,560	18,241	20,346	7,692	11,967	9,378	5,122	7,216	94,522
1998	14,965	18,337	20,264	7,396	11,834	9,303	5,046	7,027	94,171
1999	15,346	18,383	20,129	7,098	11,738	9,241	4,969	6,847	93,752
2000	15,800	18,485	20,112	6,834	11,719	9,255	4,941	6,695	93,841
2001	16,242	18,602	20,097	6,582	11,684	9,250	4,903	6,549	93,909
2002	16,521	18,488	20,248	6,595	11,632	9,042	4,776	6,732	94,034
2003	16,893	18,411	20,486	6,621	11,689	8,924	4,701	6,947	94,672
2004	17,240	18,312	20,661	6,645	11,739	8,798	4,620	7,158	95,173
2005	17,664	18,350	20,885	6,670	11,873	8,747	4,583	7,400	96,171
2006	18,079	18,375	21,083	6,690	12,136	8,786	4,594	7,643	97,386
2007	18,442	18,344	21,249	6,672	12,406	8,842	4,615	7,853	98,423
2008	18,820	18,272	21,464	6,664	12,853	9,008	4,696	8,074	99,850
2009	19,178	18,180	21,640	6,668	13,217	9,118	4,749	8,279	101,029
2010	19,565	18,160	21,855	6,676	13,598	9,220	4,792	8,518	102,384
2011	19,938	18,135	22,059	6,696	14,003	9,334	4,840	8,754	103,757
2012	20,235	18,125	22,280	6,675	14,431	9,456	4,898	8,968	105,068
2013	20,585	18,114	22,514	6,689	14,808	9,563	4,945	9,173	106,391
2014	20,968	18,120	22,750	6,723	15,239	9,702	5,008	9,400	107,909
2015	21,428	18,162	23,043	6,761	15,580	9,794	5,047	9,665	109,481
2016	21,899	18,226	23,362	6,822	15,906	9,869	5,078	9,925	111,088
2017	22,335	18,281	23,646	6,865	16,251	9,961	5,118	10,158	112,614

Source: MHCLG Household Projections model (2014-based)

Table 8.25: Number of households by type, Stockport

Year	One person households: Male	One person households: Female	Couples	A couple and one or more other adults: No dependent children	Households with one dependent child	Households with two dependent children	Households with three dependent children	Other households	Total
1995	13,134	20,352	31,335	11,320	14,755	14,558	5,615	7,529	118,599
1996	13,556	20,665	31,414	10,945	14,873	14,555	5,679	7,357	119,044
1997	13,955	20,947	31,463	10,567	14,944	14,532	5,736	7,181	119,325
1998	14,355	21,207	31,608	10,236	15,007	14,486	5,779	7,021	119,698
1999	14,746	21,409	31,730	9,899	15,089	14,489	5,844	6,854	120,060
2000	15,071	21,549	31,731	9,553	15,087	14,430	5,882	6,668	119,971
2001	15,470	21,818	31,890	9,276	15,173	14,434	5,942	6,527	120,530
2002	15,720	21,613	31,829	9,324	15,173	14,292	5,846	6,552	120,348
2003	16,026	21,463	31,856	9,388	15,187	14,142	5,746	6,600	120,408
2004	16,293	21,301	31,757	9,407	15,243	14,039	5,664	6,632	120,336
2005	16,538	21,141	31,615	9,416	15,285	13,887	5,559	6,663	120,103
2006	16,837	21,041	31,540	9,463	15,323	13,731	5,453	6,719	120,107
2007	17,142	20,958	31,511	9,457	15,483	13,685	5,393	6,771	120,400
2008	17,451	20,883	31,566	9,491	15,648	13,618	5,325	6,834	120,815
2009	17,736	20,781	31,571	9,530	15,871	13,585	5,271	6,894	121,239
2010	18,010	20,677	31,563	9,578	16,083	13,520	5,205	6,958	121,594
2011	18,257	20,539	31,512	9,604	16,341	13,505	5,162	7,009	121,929
2012	18,512	20,456	31,488	9,584	16,710	13,601	5,163	7,054	122,569
2013	18,802	20,352	31,512	9,595	17,036	13,668	5,158	7,108	123,232
2014	19,130	20,305	31,593	9,648	17,387	13,767	5,165	7,185	124,181
2015	19,480	20,231	31,703	9,714	17,645	13,827	5,158	7,261	125,019
2016	19,854	20,183	31,857	9,810	17,892	13,857	5,142	7,355	125,949
2017	20,192	20,114	31,990	9,897	18,205	13,925	5,143	7,438	126,905

Source: MHCLG Household Projections model (2014-based)

Table 8.26: Number of households by type, Tameside

Year	One person households: Male	One person households: Female	Couples	A couple and one or more other adults: No dependent children	Households with one dependent child	Households with two dependent children	Households with three dependent children	Other households	Total
1995	10,168	14,899	21,851	8,528	12,526	10,940	4,505	5,775	89,192
1996	10,552	15,002	21,686	8,283	12,589	10,906	4,546	5,599	89,164
1997	11,007	15,234	21,661	8,068	12,727	10,942	4,613	5,464	89,716
1998	11,368	15,334	21,572	7,842	12,726	10,848	4,620	5,301	89,611
1999	11,696	15,444	21,468	7,615	12,665	10,691	4,593	5,141	89,312
2000	12,070	15,613	21,418	7,397	12,696	10,638	4,608	5,001	89,442
2001	12,486	15,829	21,468	7,215	12,793	10,624	4,636	4,887	89,938
2002	12,746	15,689	21,515	7,219	12,886	10,573	4,613	4,941	90,182
2003	13,056	15,633	21,662	7,247	12,917	10,446	4,564	5,017	90,541
2004	13,369	15,578	21,771	7,287	12,946	10,311	4,509	5,093	90,864
2005	13,689	15,561	21,835	7,312	12,949	10,158	4,446	5,170	91,120
2006	14,062	15,570	21,931	7,375	13,036	10,059	4,405	5,267	91,706
2007	14,393	15,549	22,012	7,384	13,124	9,964	4,367	5,345	92,139
2008	14,738	15,555	22,151	7,400	13,341	9,950	4,366	5,429	92,930
2009	15,070	15,536	22,234	7,434	13,552	9,915	4,352	5,514	93,607
2010	15,413	15,548	22,319	7,459	13,798	9,907	4,351	5,603	94,396
2011	15,763	15,568	22,441	7,500	13,977	9,844	4,328	5,696	95,116
2012	16,008	15,550	22,442	7,464	14,293	9,875	4,346	5,750	95,728
2013	16,216	15,471	22,395	7,409	14,536	9,875	4,352	5,786	96,041
2014	16,432	15,373	22,354	7,388	14,758	9,864	4,354	5,826	96,349
2015	16,713	15,323	22,369	7,390	14,956	9,858	4,358	5,888	96,856
2016	17,021	15,311	22,462	7,419	15,128	9,831	4,357	5,961	97,490
2017	17,331	15,312	22,566	7,443	15,304	9,823	4,365	6,035	98,179

Source: MHCLG Household Projections model (2014-based)

Table 8.27: Number of households by type, Trafford

Year	One person households: Male	One person households: Female	Couples	A couple and one or more other adults: No dependent children	Households with one dependent child	Households with two dependent children	Households with three dependent children	Other households	Total
1995	10,210	15,388	21,541	8,318	10,942	10,520	4,605	6,262	87,786
1996	10,633	15,635	21,728	8,013	10,899	10,497	4,620	6,159	88,184
1997	10,992	15,781	21,852	7,715	10,804	10,425	4,612	6,032	88,213
1998	11,443	16,027	22,154	7,464	10,808	10,482	4,667	5,950	88,994
1999	11,805	16,124	22,299	7,160	10,737	10,469	4,692	5,819	89,105
2000	12,128	16,193	22,400	6,872	10,649	10,431	4,704	5,683	89,061
2001	12,474	16,275	22,574	6,641	10,611	10,413	4,721	5,571	89,280
2002	12,549	16,157	22,705	6,702	10,771	10,473	4,714	5,657	89,728
2003	12,625	16,032	22,857	6,774	11,007	10,580	4,731	5,749	90,354
2004	12,679	15,914	22,936	6,822	11,185	10,647	4,730	5,829	90,743
2005	12,722	15,790	22,940	6,852	11,415	10,755	4,747	5,903	91,124
2006	12,834	15,706	23,030	6,936	11,660	10,867	4,763	6,010	91,807
2007	12,909	15,599	23,080	6,973	11,903	10,984	4,781	6,095	92,323
2008	12,973	15,504	23,142	7,022	12,158	11,086	4,788	6,179	92,852
2009	13,044	15,408	23,200	7,085	12,493	11,236	4,813	6,270	93,547
2010	13,129	15,324	23,287	7,154	12,797	11,360	4,829	6,362	94,243
2011	13,148	15,168	23,226	7,179	13,140	11,519	4,861	6,420	94,662
2012	13,232	15,117	23,321	7,217	13,490	11,690	4,902	6,503	95,471
2013	13,352	15,084	23,458	7,275	13,799	11,827	4,931	6,600	96,326
2014	13,536	15,114	23,661	7,366	14,130	11,996	4,972	6,724	97,497
2015	13,698	15,085	23,812	7,446	14,434	12,136	5,002	6,832	98,447
2016	13,886	15,073	24,018	7,547	14,698	12,238	5,019	6,946	99,425
2017	14,062	15,044	24,208	7,660	14,993	12,345	5,038	7,055	100,405

Source: MHCLG Household Projections model (2014-based)

Table 8.28: Number of households by type, Wigan

Year	One person households: Male	One person households: Female	Couples	A couple and one or more other adults: No dependent children	Households with one dependent child	Households with two dependent children	Households with three dependent children	Other households	Total
1995	12,946	18,736	30,496	13,333	18,082	15,803	5,822	7,331	122,550
1996	13,406	18,942	30,770	12,962	18,170	15,782	5,774	7,216	123,022
1997	13,869	19,162	31,119	12,582	18,255	15,787	5,743	7,109	123,625
1998	14,296	19,320	31,524	12,235	18,280	15,710	5,683	7,002	124,050
1999	14,695	19,412	31,875	11,900	18,324	15,682	5,648	6,889	124,425
2000	15,110	19,603	32,269	11,562	18,339	15,615	5,602	6,792	124,892
2001	15,491	19,731	32,635	11,254	18,318	15,503	5,543	6,689	125,165
2002	15,960	19,703	33,017	11,306	18,398	15,422	5,523	6,801	126,130
2003	16,418	19,654	33,418	11,357	18,523	15,350	5,499	6,911	127,130
2004	16,884	19,617	33,773	11,418	18,620	15,243	5,456	7,022	128,033
2005	17,368	19,645	34,056	11,457	18,742	15,167	5,423	7,136	128,994
2006	17,915	19,722	34,404	11,551	18,894	15,088	5,382	7,279	130,235
2007	18,406	19,751	34,683	11,557	19,055	14,999	5,333	7,392	131,175
2008	18,899	19,789	34,993	11,573	19,388	15,017	5,322	7,507	132,488
2009	19,416	19,858	35,379	11,646	19,701	14,992	5,296	7,640	133,927
2010	19,947	19,949	35,744	11,720	19,964	14,921	5,257	7,780	135,282
2011	20,430	19,983	36,044	11,788	20,265	14,859	5,225	7,906	136,500
2012	20,746	19,958	36,119	11,736	20,666	14,861	5,217	7,977	137,278
2013	21,093	19,895	36,311	11,743	21,007	14,822	5,199	8,056	138,127
2014	21,463	19,902	36,497	11,757	21,357	14,807	5,190	8,153	139,126
2015	21,880	19,870	36,742	11,825	21,602	14,735	5,159	8,261	140,073
2016	22,315	19,884	37,037	11,922	21,830	14,645	5,127	8,385	141,144
2017	22,746	19,907	37,337	11,983	22,054	14,596	5,116	8,501	142,239

Source: MHCLG Household Projections model (2014-based)

Economic activity and employment

Table 8.29: Economic activity rates, 2006/07-2016/17

Area	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	% change 2006-17
Bolton	75.0%	75.4%	74.9%	73.6%	70.8%	73.7%	73.0%	74.4%	74.7%	74.6%	74.8%	-0.2%
Bury	74.7%	77.3%	74.0%	77.4%	76.1%	81.0%	83.6%	77.5%	76.3%	76.1%	75.5%	0.8%
Manchester	70.8%	66.3%	68.1%	67.1%	66.4%	67.6%	69.2%	68.8%	67.2%	70.4%	70.2%	-0.6%
Oldham	71.9%	72.7%	72.6%	74.4%	72.3%	72.3%	72.0%	71.9%	71.1%	73.0%	73.5%	1.6%
Rochdale	73.4%	72.4%	74.8%	72.1%	72.6%	71.4%	69.9%	70.0%	68.5%	69.3%	69.2%	-4.2%
Salford	74.6%	75.6%	73.4%	72.2%	74.2%	74.9%	73.7%	74.5%	78.4%	75.3%	77.8%	3.2%
Stockport	80.7%	78.1%	79.2%	80.0%	79.2%	77.1%	79.3%	81.2%	82.0%	81.6%	81.0%	0.3%
Tameside	76.5%	76.0%	75.8%	75.3%	73.9%	73.5%	77.1%	74.4%	72.8%	76.4%	74.9%	-1.6%
Trafford	80.0%	80.7%	77.5%	77.3%	77.8%	76.9%	77.4%	78.9%	81.6%	82.2%	81.2%	1.2%
Wigan	74.0%	75.5%	78.1%	75.9%	76.2%	78.1%	76.7%	79.8%	80.5%	80.5%	78.9%	4.9%
Greater Manchester	74.8%	74.1%	74.3%	73.8%	73.2%	73.9%	74.4%	74.6%	74.6%	75.5%	75.2%	0.4%
North West	74.9%	74.5%	74.6%	74.4%	74.6%	75.2%	75.3%	74.7%	74.6%	75.8%	76.0%	1.1%
England and Wales	76.6%	76.6%	76.7%	76.3%	76.0%	76.4%	77.1%	77.3%	77.5%	77.9%	78.1%	1.5%

Source: Annual Population Survey

Table 8.30: Employment rates, 2006/07-2016/17

Area	2006/07	2007/08	2008/09	2009/10	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	% change 2006-17
Bolton	70.8%	71.3%	69.3%	66.0%	65.5%	66.2%	66.4%	67.6%	70.1%	69.7%	70.9%	0.1%
Bury	70.3%	72.8%	68.8%	70.7%	70.0%	73.8%	76.5%	72.1%	70.9%	71.8%	72.1%	1.8%
Manchester	65.5%	59.5%	60.8%	58.4%	58.7%	58.6%	60.7%	62.3%	61.7%	64.7%	64.9%	-0.6%
Oldham	67.4%	65.7%	65.6%	67.5%	65.0%	64.3%	65.3%	65.1%	64.4%	67.5%	68.1%	0.7%
Rochdale	68.7%	67.2%	67.9%	64.6%	66.1%	63.4%	63.4%	62.8%	63.5%	64.3%	64.4%	-4.3%
Salford	69.9%	71.6%	66.5%	63.5%	66.1%	67.2%	65.0%	66.5%	71.9%	68.1%	73.0%	3.1%
Stockport	77.7%	75.1%	73.5%	74.1%	73.5%	71.7%	74.8%	76.4%	78.0%	77.5%	77.3%	-0.4%
Tameside	72.4%	70.8%	69.3%	70.1%	65.9%	66.3%	69.7%	67.6%	69.3%	71.0%	71.0%	-1.4%
Trafford	77.3%	76.9%	72.0%	71.3%	72.9%	71.2%	72.5%	74.0%	76.2%	78.9%	78.4%	1.1%
Wigan	70.0%	70.7%	72.9%	69.9%	70.8%	70.9%	70.1%	72.2%	75.9%	76.5%	75.7%	5.7%
Greater Manchester	70.5%	69.1%	68.0%	66.7%	66.6%	66.4%	67.5%	68.1%	69.5%	70.5%	71.0%	0.5%
North West	70.6%	70.1%	68.9%	68.2%	68.4%	68.5%	69.1%	68.7%	70.1%	71.6%	72.4%	1.8%
England and Wales	72.5%	72.5%	71.3%	70.3%	70.0%	70.1%	71.0%	71.9%	73.1%	73.9%	74.4%	1.9%

Source: Annual Population Survey

Qualifications

Table 8.31: People qualified to level 4 and above, 2006-2016

Area	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Bolton	34,700	39,300	37,800	43,800	48,100	45,500	45,700	44,400	44,800	52,900	58,700
Bury	28,500	28,500	30,200	32,200	35,000	34,100	40,800	42,400	39,900	43,300	45,600
Manchester	102,300	98,300	93,600	101,000	114,200	134,100	132,600	138,700	131,300	146,700	145,800
Oldham	25,900	26,500	27,600	33,100	34,200	26,600	31,100	32,000	33,900	39,300	36,600
Rochdale	26,400	26,900	24,800	28,700	30,600	31,200	32,900	30,800	32,100	34,000	33,700
Salford	28,100	31,800	32,300	35,300	39,000	40,900	42,600	44,600	47,400	49,800	49,000
Stockport	59,700	52,300	56,100	60,200	61,500	64,500	68,400	71,800	72,600	63,500	72,100
Tameside	23,100	25,900	28,400	26,700	25,000	29,400	31,500	33,000	37,500	34,800	36,700
Trafford	49,400	49,000	50,200	53,300	54,000	56,400	61,200	58,700	64,500	70,000	76,900
Wigan	39,600	39,700	44,100	47,100	46,800	52,000	50,000	55,500	53,900	56,500	54,600
Greater Manchester	417,700	418,200	425,100	461,500	488,500	514,600	536,900	551,800	557,900	590,700	609,700
North West	1,068,700	1,096,400	1,133,500	1,215,200	1,293,000	1,291,100	1,354,600	1,384,300	1,380,400	1,460,800	1,518,400
England and Wales	9,109,300	9,561,200	9,943,600	10,468,900	11,034,400	11,531,900	12,125,100	12,459,600	12,788,400	13,227,000	13,706,600

Source: Annual Population Survey

Table 8.32: People with no qualifications, 2006-2016

Area	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Bolton	28,200	23,300	27,500	27,500	22,100	24,100	23,000	23,200	23,400	16,900	19,000
Bury	17,900	15,800	17,400	12,200	12,500	11,600	8,500	10,300	8,100	9,600	9,100
Manchester	62,300	60,300	69,600	55,200	52,000	49,800	47,800	46,600	42,500	46,100	39,900
Oldham	27,200	26,100	28,000	25,500	23,300	22,800	22,200	21,500	23,300	21,300	17,700
Rochdale	25,000	24,400	27,600	21,400	20,900	22,100	19,800	19,400	19,400	18,500	18,300
Salford	27,900	22,900	23,600	21,900	20,000	18,700	18,700	18,600	15,700	14,600	16,300
Stockport	16,400	17,200	18,600	15,800	14,400	12,000	13,400	13,100	9,600	8,800	11,100
Tameside	24,900	24,200	23,600	23,700	20,800	20,000	15,400	15,500	14,400	17,500	12,800
Trafford	11,500	12,000	12,700	13,500	10,500	9,600	10,900	10,100	8,600	7,200	6,900
Wigan	38,000	34,100	33,200	31,000	25,600	22,900	23,300	24,500	20,500	16,800	21,600
Greater Manchester	279,200	260,400	281,700	247,700	222,200	213,700	203,100	202,700	185,400	177,400	172,800
North West	686,100	654,000	710,100	620,700	544,100	541,700	500,500	494,100	472,200	439,900	425,500
England and Wales	4,671,400	4,502,600	4,742,400	4,355,600	4,019,200	3,771,500	3,452,400	3,335,000	3,129,300	3,086,000	2,862,000

Source: Annual Population Survey

Occupations

Table 8.33: Residence based occupations, 2016/17

Area	Managers, Directors and Senior Officials	Professional Occupations	Associate Prof & Tech Occupations	Administrative and Secretarial Occupations	Skilled Trades Occupations	Caring, Leisure and Other Service Occupations	Sales and Customer Service Occupations	Process, Plant and Machine Operatives	Elementary occupations
Bolton	10,700	24,800	16,700	11,700	14,400	12,300	12,100	12,100	13,200
Bury	8,400	18,700	11,600	10,900	7,100	7,900	7,800	6,900	8,400
Manchester	16,800	52,200	33,800	23,100	20,900	31,200	23,400	13,300	34,700
Oldham	8,400	11,400	13,900	10,200	9,600	11,000	7,800	8,600	17,200
Rochdale	7,200	13,500	11,100	7,600	9,300	10,500	8,100	7,700	11,500
Salford	8,700	20,400	15,500	15,000	8,300	11,200	11,700	9,700	19,700
Stockport	16,100	31,900	22,000	15,100	11,300	14,900	14,400	6,700	8,400
Tameside	10,800	13,300	15,800	9,500	11,800	9,000	9,400	9,000	11,900
Trafford	15,300	34,900	21,600	14,100	7,300	9,500	7,200	3,000	6,100
Wigan	9,600	25,900	17,900	22,200	19,800	17,700	12,100	13,400	18,500
Greater Manchester	111,900	246,900	179,700	139,400	119,900	135,100	113,900	90,400	149,600
North West	327,900	623,200	456,400	359,700	347,200	333,700	286,200	233,600	374,500
England and Wales	3,080,000	5,727,500	4,054,100	2,906,500	2,899,600	2,587,000	2,104,600	1,794,100	2,974,900

Source: Annual Population Survey

Table 8.34: Workplace based occupations, 2016/17

Area	Managers, Directors and Senior Officials	Professional Occupations	Associate Prof & Tech Occupations	Administrative and Secretarial Occupations	Skilled Trades Occupations	Caring, Leisure and Other Service Occupations	Sales and Customer Service Occupations	Process, Plant and Machine Operatives	Elementary occupations
Bolton	10,900	20,600	13,700	13,200	13,200	10,500	11,100	9,700	11,700
Bury	6,400	13,500	5,900	7,300	5,200	9,100	6,800	4,700	8,700
Manchester	39,200	104,300	78,500	47,600	35,900	33,300	33,300	20,300	47,500
Oldham	7,800	16,400	10,700	6,000	8,200	10,200	5,100	8,300	14,300
Rochdale	8,000	12,000	9,200	5,300	7,600	10,900	5,400	7,400	10,000
Salford	7,200	21,700	15,500	14,600	8,100	12,500	6,700	6,400	9,500
Stockport	13,600	24,300	14,600	14,000	9,000	15,800	17,000	6,900	9,500
Tameside	7,400	9,400	7,600	5,000	8,600	6,000	6,000	4,900	9,400
Trafford	14,000	17,400	16,300	13,900	7,100	10,600	11,900	8,000	10,500
Wigan	8,300	19,700	9,700	16,100	15,000	15,300	12,400	8,700	11,200
Greater Manchester	122,700	259,400	181,500	143,000	117,900	134,200	115,800	85,400	142,200
North West	326,500	626,300	455,900	365,300	347,800	332,700	287,000	230,100	374,000
England and Wales	3,065,300	5,692,200	4,029,200	2,894,000	2,874,600	2,575,000	2,094,500	1,779,700	2,958,600

Source: Annual Population Survey

Industry of employment

Table 8.35: Residence based industry of employment, 2016

Area	Manufacturing	Business Financial Professional Services	Digital and Creative Industries	Health and Social Care	Health Innovation	Logistics	Retail & Wholesale	Hospitality Tourism & Sport	Construction	Education	Public Administration
Bolton	13,000	21,000	3,250	15,000	400	6,500	19,000	8,500	5,500	8,500	4,000
Bury	7,500	12,000	2,250	13,500	90	4,000	12,500	6,000	2,500	7,000	2,000
Manchester	18,000	109,500	23,000	46,500	1,375	27,500	46,500	42,000	7,500	37,500	15,500
Oldham	10,500	11,000	2,750	14,000	550	6,000	15,000	7,000	4,000	8,500	2,500
Rochdale	11,000	10,000	3,250	8,500	100	6,000	13,000	5,000	4,000	8,000	2,375
Salford	9,500	24,500	10,000	16,000	90	4,250	17,500	10,000	6,000	11,500	7,500
Stockport	12,000	27,500	8,500	17,500	130	4,000	22,000	10,500	4,750	10,000	4,750
Tameside	12,000	6,500	1,875	10,500	210	2,375	13,500	6,000	3,000	7,000	2,750
Trafford	12,000	47,000	7,500	10,500	600	7,500	26,500	15,000	7,000	8,000	5,000
Wigan	13,500	16,500	2,125	16,500	190	6,000	17,500	9,500	6,000	9,000	6,000
Greater Manchester	119,000	285,500	64,500	168,500	3,750	74,000	202,500	119,000	51,000	114,000	52,000
North West	355,000	615,500	136,000	471,000	16,500	182,500	511,500	345,500	137,000	291,000	143,000
England and Wales	2,466,000	5,436,500	1,698,000	3,513,500	184,000	1,339,500	4,233,000	2,741,000	1,290,500	2,419,500	1,106,000

Source: Annual Population Survey

Household income

Table 8.36: Average Household Incomes, 2016

Area	Mean Income	Median Income
Bolton	£32,837	£25,524
Bury	£37,346	£29,999
Manchester	£29,820	£23,277
Oldham	£31,505	£24,652
Rochdale	£31,171	£24,249
Salford	£31,492	£24,560
Stockport	£40,649	£32,746
Tameside	£31,691	£25,354
Trafford	£43,682	£35,126
Wigan	£33,044	£26,399
Greater Manchester	£33,886	£26,556
North West	£34,561	£27,186
Great Britain	£38,858	£30,921

Source: CACI Paycheck 2017

Homelessness

Table 8.37: Homeless decisions in Greater Manchester, 2016/17

Area	Number of house-holds (000s)	Numbers accepted as being homeless and in priority need								Other decisions			
		White	Black or Black British	Asian or Asian British	Mixed	Other ethnic origin	Ethnic Group not Stated	Total	Number per 1,000 house-holds	Eligible, homeless and in priority need, but intentionally	Eligible, homeless but not in priority need	Eligible, but not homeless	Total decisions
Bolton	119.574	167	9	17	--	--	--	197	1.65	81	41	168	487
Bury	80.496	125	12	32	--	--	--	177	2.20	13	115	20	325
Manchester	220.121	562	276	157	55	180	8	1,242	5.64	205	636	695	2,778
Oldham	93.164	47	8	22	--	--	--	86	0.92	13	29	114	242
Rochdale	89.822	179	26	40	8	40	6	296	3.30	11	194	412	913
Salford	111.088	218	44	27	10	20	19	340	3.06	68	490	312	1,210
Stockport	125.949	168	11	11	11	20	20	238	1.89	--	221	--	483
Tameside	97.490	186	8	9	--	--	8	218	2.24	47	219	76	560
Trafford	99.425	118	15	15	--	10	--	169	1.70	--	--	66	273
Wigan	141.144	115	5	--	--	10	51	179	1.27	43	89	66	377
Greater Manchester	1,178.273	1,885	414	330	84	280	112	3,142	2.67	481	2,034	1,929	7,648
England	23,229	35,890	9,330	5,560	1,990	2,830	3,510	59,10 0	2.54	9,850	19,460	27,140	115,550

Source: MHCLG Live Table 784: Local authorities' action under the homelessness provisions of the 1985 and 1996 Housing Acts

Table 8.38: Prevention and Relief Activity, 2016/17

Area	Number of households (000s)	Prevention - Able to remain in existing home	Prevention - Assisted to obtain alternative accommo dation	Total Prevention	Prevention Rate per 1,000 households	Relief	Relief Rate per 1,000 house-holds	Total prevention and relief	Prevention and relief Rate per 1,000 house-holds
Bolton	120	467	577	1,044	8.73	84	0.70	1,128	9.43
Bury	80	1,543	572	2,115	26.27	6	0.07	2,121	26.35
Manchester	220	698	931	1,629	7.40	2	0.01	1,631	7.41
Oldham	93	1,486	556	2,042	21.92	4	0.04	2,046	21.96
Rochdale	90	1,106	398	1,504	16.74	73	0.81	1,577	17.56
Salford	111	226	505	731	6.58	46	0.41	777	6.99
Stockport	126	1,254	491	1,745	13.85	113	0.90	1,858	14.75
Tameside	97	564	478	1,042	10.69	86	0.88	1,128	11.57
Trafford	99	230	580	810	8.15	28	0.28	838	8.43
Wigan	141	3,808	1,104	4,912	34.80	21	0.15	4,933	34.95
Greater Manchester	1,178	11,382	6,192	17,574	14.92	463	0.39	18,037	15.31
England	23,229	105,896	94,263	200,159	8.62	15,058	0.65	215,217	9.27

Source: MHCLG Live Table 792: Total reported cases of homelessness prevention and relief by outcome and local authority

Table 8.39: Rough sleeping, 2010-2017

Area	2010	2011	2012	2013	2014	2015	2016	2017	Number of Households 2017 ('000s)	2017 Rough Sleeping Rate (per 1,000 households)
Bolton	2	1	1	1	4	8	8	17	120	0.14
Bury	3	9	3	10	0	9	3	10	81	0.12
Manchester	7	15	27	24	43	70	78	94	223	0.42
Oldham	1	0	1	2	0	2	3	2	94	0.02
Rochdale	5	5	8	6	17	2	12	8	90	0.09
Salford	4	11	10	7	14	16	26	49	113	0.44
Stockport	1	0	4	3	7	9	10	10	127	0.08
Tameside	9	7	0	2	7	14	19	43	98	0.44
Trafford	3	1	2	2	2	1	2	5	100	0.05
Wigan	6	11	15	13	7	3	28	30	142	0.21
Greater Manchester	41	60	71	70	101	134	189	268	1,189	0.23
England	1,768	2,181	2,309	2,414	2,744	3,569	4,134	4,751	23,464	0.20

Source: MHCLG Rough sleeping statistics England autumn 2017 Table 1: Street counts and estimates of rough sleeping in England, Autumn 2010–2017

Housing type, size and tenure

Table 8.40: Type of housing, 2011

Area	Bungalow	Flat/ Maisonette	House : Terraced	House : Semi-detached	House : Detached	Other	All properties
Bolton	11,670	17,390	45,720	33,010	14,220	2,110	124,120
Bury	6,850	12,230	26,060	26,240	11,340	630	83,350
Manchester	2,840	82,280	79,560	54,840	5,970	820	226,310
Oldham	9,560	12,150	42,230	23,130	7,840	940	95,850
Rochdale	6,920	13,350	36,540	24,980	10,940	530	93,260
Salford	4,620	32,960	35,590	32,100	7,650	1,790	114,710
Stockport	9,330	20,610	29,530	46,900	20,830	760	127,960
Tameside	7,070	15,330	39,410	29,990	8,470	1,460	101,730
Trafford	3,640	19,630	22,270	39,660	12,750	500	98,450
Wigan	16,570	13,660	41,250	51,110	19,440	1,190	143,220
Greater Manchester	79,050	239,580	398,140	361,940	119,460	10,790	1,208,960
North West	280,380	541,550	1,038,410	932,200	414,670	42,600	3,249,810
England and Wales	2,440,780	5,665,530	6,789,660	6,086,400	3,985,240	442,750	25,410,360

Source: Census 2011

Table 8.41: Number of bedrooms, 2011

Area	1 bedroom	2 bedrooms	3 bedrooms	4+ bedrooms	Not Known	All properties
Bolton	11,850	45,550	49,520	14,360	740	122,010
Bury	7,430	26,790	37,010	10,790	720	82,720
Manchester	37,580	72,290	96,570	16,550	2,500	225,490
Oldham	8,240	40,970	35,660	9,510	520	94,910
Rochdale	9,130	32,380	39,880	10,800	560	92,730
Salford	14,330	38,610	48,700	10,490	790	112,920
Stockport	11,610	35,390	61,740	17,460	1,000	127,200
Tameside	9,810	37,820	43,940	8,170	560	100,270
Trafford	8,900	21,270	53,340	14,070	390	97,950
Wigan	8,310	40,020	75,860	16,080	1,780	142,030
Greater Manchester	127,160	391,080	542,180	128,270	9,500	1,198,170
North West	300,520	944,490	1,513,780	433,410	15,030	3,207,210
England and Wales	2,963,480	7,020,140	11,035,570	3,777,350	171,060	24,967,610

Source: Census 2011

Table 8.42: Household tenure, 2011

Area	Owned outright	Owned with a mortgage or loan	Shared ownership	Social rented	Private rented or living rent free
Bolton	35,378	38,792	605	23,825	17,771
Bury	24,839	29,556	247	11,703	11,768
Manchester	31,145	46,250	1,481	64,682	61,411
Oldham	27,193	31,066	352	18,918	12,174
Rochdale	24,334	29,815	340	20,247	12,816
Salford	22,603	29,523	508	29,819	21,103
Stockport	42,761	46,555	987	16,620	15,056
Tameside	26,688	33,870	309	20,438	13,648
Trafford	30,322	35,118	570	15,485	12,989
Wigan	42,446	50,113	331	25,803	17,693
North West	934,101	1,007,463	15,787	550,481	501,717
Greater Manchester	307,709	370,658	5,730	247,540	196,429
England and Wales	7,206,954	7,646,724	178,236	4,118,461	4,215,669

Source: Census 2011

Overcrowding, under-occupation and concealed households

Table 8.43: Level of occupancy (rooms), 2011

Area	Level of occupancy (% of households)		
	Under-occupied	Occupied to standard	Overcrowded
Bolton	67.36	28.03	4.61
Bury	71.50	25.01	3.49
Manchester	56.51	35.73	7.76
Oldham	64.26	29.11	6.64
Rochdale	65.18	29.46	5.36
Salford	64.87	30.97	4.16
Stockport	73.58	23.49	2.93
Tameside	67.39	28.67	3.94
Trafford	73.91	22.85	3.24
Wigan	73.70	23.61	2.68
Greater Manchester	67.02	28.28	4.70
England	68.68	26.68	4.64

Source: Census 2011

Table 8.44: Level of overcrowding (bedrooms) 2011

Area	% of households			
	Owned or shared ownership	Social rented	Private rented or living rent free	Households with 5 people or more
Bolton	3.51	6.69	6.50	7.53
Bury	2.44	6.11	5.75	6.68
Manchester	4.97	8.10	10.97	8.96
Oldham	5.52	8.77	8.69	9.59
Rochdale	4.45	7.01	6.62	8.66
Salford	2.30	5.73	6.60	5.91
Stockport	1.79	7.20	5.03	5.93
Tameside	2.76	6.83	4.87	6.05
Trafford	1.77	6.57	6.76	6.99
Wigan	1.64	5.36	4.25	5.15
Greater Manchester	3.03	7.00	7.60	7.20
England	2.27	8.73	8.58	7.02

Source: Census 2011

Table 8.45: Occupancy rating (bedrooms), 2011

Area	Occupancy rating (bedrooms) of +2 or more	Occupancy rating (bedrooms) of +1	Occupancy rating (bedrooms) of 0	Occupancy rating (bedrooms) of -1 or less
Bolton	34,061	44,327	32,614	5,369
Bury	26,474	29,380	19,533	2,726
Manchester	45,509	70,320	73,241	15,899
Oldham	23,051	34,588	26,110	5,954
Rochdale	24,996	32,074	25,789	4,693
Salford	27,942	39,231	32,075	4,308
Stockport	45,609	44,149	28,651	3,570
Tameside	26,387	37,604	27,225	3,737
Trafford	36,928	32,905	21,589	3,062
Wigan	46,583	53,937	32,205	3,661
Greater Manchester	337,540	418,515	319,032	52,979

Source: Census 2011

Table 8.46: Occupancy rating (bedrooms), 2011 – Owner-occupied/ shared ownership households

Area	Occupancy rating (bedrooms) of +2 or more	Occupancy rating (bedrooms) of +1	Occupancy rating (bedrooms) of 0	Occupancy rating (bedrooms) of -1 or less
Bolton	29,300	30,132	12,722	2,621
Bury	23,745	21,352	8,211	1,334
Manchester	29,027	29,930	15,995	3,924
Oldham	19,917	24,184	11,274	3,236
Rochdale	21,254	21,215	9,595	2,425
Salford	21,960	20,785	8,681	1,208
Stockport	42,056	33,906	12,726	1,615
Tameside	22,750	25,822	10,618	1,677
Trafford	33,181	23,045	8,618	1,166
Wigan	40,130	37,400	13,835	1,525
Greater Manchester	283,320	267,771	112,275	20,731

Source: Census 2011

Table 8.47: Occupancy rating (bedrooms), 2011- Social rented households

Area	Occupancy rating (bedrooms) of +2 or more	Occupancy rating (bedrooms) of +1	Occupancy rating (bedrooms) of 0	Occupancy rating (bedrooms) of -1 or less
Bolton	2,515	6,728	12,989	1,593
Bury	974	3,106	6,908	715
Manchester	9,933	21,210	28,302	5,237
Oldham	1,614	5,371	10,273	1,660
Rochdale	1,965	5,573	11,290	1,419
Salford	3,706	10,458	13,947	1,708
Stockport	1,461	4,323	9,639	1,197
Tameside	1,885	5,903	11,254	1,396
Trafford	1,657	4,707	8,103	1,018
Wigan	3,594	8,574	12,251	1,384
Greater Manchester	29,304	75,953	124,956	17,327

Source: Census 2011

Table 8.48: Occupancy rating (bedrooms), 2011- Private rented households and households living rent free

Area	Occupancy rating (bedrooms) of +2 or more	Occupancy rating (bedrooms) of +1	Occupancy rating (bedrooms) of 0	Occupancy rating (bedrooms) of -1 or less
Bolton	2,246	7,467	6,903	1,155
Bury	1,755	4,922	4,414	677
Manchester	6,549	19,180	28,944	6,738
Oldham	1,520	5,033	4,563	1,058
Rochdale	1,777	5,286	4,904	849
Salford	2,276	7,988	9,447	1,392
Stockport	2,092	5,920	6,286	758
Tameside	1,752	5,879	5,353	664
Trafford	2,090	5,153	4,868	878
Wigan	2,859	7,963	6,119	752
Greater Manchester	24,916	74,791	81,801	14,921

Source: Census 2011

Table 8.49: Concealed Families, 2011

Area	Concealed Families
Bolton	1,535
Bury	828
Manchester	2,814
Oldham	1,647
Rochdale	1,347
Salford	891
Stockport	1,264
Tameside	1,098
Trafford	1,024
Wigan	1,195
Greater Manchester	13,643

Source: Census 2011

Table 8.50: Composition of concealed families, 2011

Area	% of all families that are concealed families		
	All concealed families	Lone parent concealed families	Couple concealed families
Bolton	1.96	0.78	1.18
Bury	1.56	0.64	0.92
Manchester	2.46	1.20	1.26
Oldham	2.62	1.17	1.45
Rochdale	2.28	0.98	1.30
Salford	1.43	0.74	0.69
Stockport	1.53	0.62	0.91
Tameside	1.73	0.88	0.85
Trafford	1.58	0.67	0.91
Wigan	1.25	0.66	0.59
Greater Manchester	1.85	0.85	1.00
England	1.85	0.68	1.18

Source: Census 2011

8.2 The table below shows all of the wards in Greater Manchester that have rates of concealed families exceeding 3% and/or levels of overcrowding exceeding 10% and also provides details of the proportion of residents who identified themselves as Asian in the 2011 Census.

Table 8.51: Concealed families, overcrowding and ethnicity, 2011

Area (where levels of concealed families exceed 3% and/or overcrowding exceeds 10%)	% of families that are concealed families	% of households that are overcrowded	% of people identifying themselves as Asian
Bolton			
Crompton	3.73	8.15	33.67
Great Lever	4.06	10.00	43.52
Halliwell	3.66	8.31	31.52
Rumworth	4.77	12.74	55.11
Manchester			
Ardwick	2.28	12.10	27.46
Burnage	3.45	7.69	21.63
Cheetham	3.91	11.79	41.78
Crumpsall	3.94	8.51	32.04
Fallowfield	3.95	10.88	19.60
Gorton South	2.07	10.10	22.83
Levenshulme	3.71	9.21	27.85
Longsight	7.20	17.62	55.27
Moss Side	2.45	14.60	18.50
Rusholme	5.87	15.09	39.94
Whalley Range	4.61	8.91	30.75
Withington	2.81	10.98	12.78
Oldham			
Alexandra	3.35	9.56	27.95
Coldhurst	6.74	19.99	66.67
Medlock Vale	3.38	10.11	36.14
St Mary's	7.94	17.16	61.01
Werneth	9.32	18.73	71.81
Rochdale			
Central Rochdale	6.43	14.53	55.18
Milkstone and Deeplish	7.30	17.48	68.57
Spotland and Falinge	3.80	7.66	25.27
Trafford			
Clifford	5.25	9.47	35.95
Longford	4.08	6.85	25.86
Greater Manchester	1.85	4.70	10.15

Source: Census 2011

Council tax bands

Table 8.52: Council tax band by property type, 2017

Area	Band	Bungalow	Flat/ Maisonette	Terraced	Semi-detached	Detached
Bolton	A	2,210	14,500	35,680	10,790	70
	B	2,550	1,950	7,220	9,050	160
	C	3,680	530	1,870	10,030	2,020
	D	2,160	260	480	2,380	4,930
	E	690	130	300	460	3,750
	F	240	10	140	200	1,590
	G	130	10	40	100	1,500
	H	10	0	-	-	210
Bury	A	1,040	10,070	14,710	4,000	20
	B	790	1,340	8,530	7,460	60
	C	1,990	580	2,060	11,550	980
	D	1,980	160	460	2,320	4,100
	E	690	50	190	660	3,730
	F	230	10	70	160	1,350
	G	110	20	50	80	960
	H	20	-	-	10	150
Manchester	A	1,520	48,020	60,990	20,940	80
	B	620	13,490	11,470	12,440	240
	C	410	9,870	4,530	15,540	1,700
	D	200	7,670	1,610	4,090	1,740
	E	60	2,380	720	1,230	1,070
	F	20	640	230	500	620
	G	10	180	10	110	480
	H	-	40	-	0	50
Oldham	A	1,770	10,920	31,890	5,220	30
	B	1,600	690	7,170	7,360	100
	C	3,950	360	2,180	8,260	1,160
	D	1,300	110	590	1,710	2,970
	E	610	60	270	390	1,870
	F	250	10	100	130	1,010
	G	80	-	30	60	650
	H	10	0	-	-	60
Rochdale	A	2,050	11,990	28,280	8,400	130
	B	1,200	1,080	5,820	7,240	130
	C	1,470	120	1,660	7,120	1,560
	D	1,510	100	610	1,720	3,790
	E	440	60	110	370	3,260
	F	160	10	50	100	1,290
	G	80	-	10	30	730
	H	-	0	0	-	50
Salford	A	1,390	21,650	26,770	8,940	50
	B	830	6,750	6,260	10,360	240
	C	1,600	2,530	1,620	8,970	1,340
	D	470	1,620	570	2,710	2,600

Area	Band	Bungalow	Flat/ Maisonette	Terraced	Semi-detached	Detached
	E	190	330	280	840	1,700
	F	90	70	70	220	930
	G	50	20	10	50	700
	H	0	0	0	0	80
Stockport	A	660	13,660	13,280	3,050	20
	B	290	4,250	10,510	12,240	80
	C	2,330	1,690	3,950	18,760	1,090
	D	3,050	620	1,200	9,480	4,730
	E	1,890	340	480	2,300	7,570
	F	790	40	80	900	4,360
	G	320	10	10	170	2,800
	H	-	-	-	-	170
Tameside	A	1,180	13,000	29,240	8,180	40
	B	710	1,960	7,490	8,230	110
	C	3,520	310	1,970	11,920	1,100
	D	1,040	50	590	1,360	3,450
	E	450	10	110	250	2,730
	F	130	0	20	50	680
	G	40	0	-	10	330
	H	-	0	0	-	30
Trafford	A	1,010	10,320	6,460	680	10
	B	330	4,200	8,780	7,720	40
	C	580	2,290	4,130	18,930	520
	D	740	1,630	1,680	8,470	2,220
	E	540	490	680	2,330	3,620
	F	300	380	350	880	2,560
	G	130	250	190	620	2,930
	H	20	80	-	30	850
Wigan	A	3,330	11,560	34,320	17,620	130
	B	5,230	1,820	5,100	18,920	350
	C	5,590	250	1,360	12,480	3,720
	D	1,800	30	350	1,730	7,960
	E	450	-	90	270	5,080
	F	140	-	40	60	1,600
	G	30	0	-	20	560
	H	-	0	0	-	40

Source: Valuation Office Agency, Table CTSOP3.0: Number of properties by Council tax band, property type and region, county and local authority district, 2017

Energy Performance Certificate ratings

Table 8.53: Greater Manchester Domestic Property EPC Ratings - all transactions

Area	EPC rating							Total
	A	B	C	D	E	F	G	
Bolton	53	4,160	22,471	34,602	13,725	3,004	833	78,848
Bury	5	2,206	12,608	23,666	10,324	2,239	548	51,596
Manchester	146	14,442	58,832	65,975	27,664	6,026	1,705	174,790
Oldham	38	4,066	17,405	32,077	13,126	2,456	647	69,815
Rochdale	44	4,152	17,513	26,330	10,182	2,134	579	60,934
Salford	27	9,506	35,506	28,821	11,262	2,282	644	88,048
Stockport	82	3,435	17,409	32,321	16,222	3,609	727	73,805
Tameside	36	3,485	22,214	29,170	10,399	2,123	662	68,089
Trafford	11	3,072	14,732	26,568	12,373	2,734	583	60,073
Wigan	88	4,774	21,808	39,094	16,064	3,439	913	86,180
Greater Manchester	530	53,298	240,498	338,624	141,341	30,046	7,841	812,178

Source: MHCLG, Energy Performance of Buildings Data England and Wales, October 2017

Migration characteristics

Table 8.54: Household migration by household type, 2011

Area	One person household			One family household			Other households		
	Inflow	Outflow	Net	Inflow	Outflow	Net	Inflow	Outflow	Net
Bolton	1,166	905	261	1,008	849	159	64	58	6
Bury	919	1,021	-102	909	792	117	57	53	4
Manchester	5,063	3,740	1,323	2,951	3,521	-570	723	385	338
Oldham	671	799	-128	687	734	-47	55	53	2
Rochdale	805	848	-43	795	756	39	67	41	26
Salford	2,847	1,581	1,266	1,545	1,351	194	279	141	138
Stockport	1,215	1,371	-156	1,396	1,153	243	54	61	-7
Tameside	934	735	199	801	762	39	60	43	17
Trafford	1,194	1,508	-314	1,659	1,216	443	109	88	21
Wigan	1,037	893	144	1,069	921	148	61	53	8
Greater Manchester	15,851	13,401	2,450	12,820	12,055	765	1,529	976	553
North West	17,203	10,823	6,380	12,654	9,342	3,312	1,455	655	800

Source: Census 2011

Table 8.55: Household migration by age, 2011

Area	Inflow				Outflow				Net			
	Total	Aged 24 and under	Aged 25 to 49	Aged 50 and over	Total	Aged 24 and under	Aged 25 to 49	Aged 50 and over	Total	Aged 24 and under	Aged 25 to 49	Aged 50 and over
Bolton	2,238	299	1,413	526	1,812	251	1,125	436	426	48	288	90
Bury	1,885	196	1,301	388	1,866	250	1,186	430	19	-54	115	-42
Manchester	8,737	1,746	6,102	889	7,646	1,258	5,413	975	1,091	488	689	-86
Oldham	1,413	160	903	350	1,586	236	994	356	-173	-76	-91	-6
Rochdale	1,667	248	1,060	359	1,645	205	1,016	424	22	43	44	-65
Salford	4,671	902	3,222	547	3,073	407	2,220	446	1,598	495	1,002	101
Stockport	2,665	261	1,779	625	2,585	283	1,552	750	80	-22	227	-125
Tameside	1,795	254	1,125	416	1,540	176	994	370	255	78	131	46
Trafford	2,962	205	2,256	501	2,812	305	1,773	734	150	-100	483	-233
Wigan	2,167	223	1,461	483	1,867	221	1,226	420	300	2	235	63

Source: Census 2011

Need for different sizes, types and values of homes

Table 8.56: Comparison of age groups provided by Census commissioned tables, MHCLG Household Projections, and amalgamated output groups for analysis

Age of HRP		
Census commissioned tables	**MHCLG Household projections**	**Output group for analysis**
16 to 34	15 to 24	16 to 34
	25 to 34	
35 to 44	35 to 44	35 to 44
45 to 54	45 to 54	45 to 54
55 to 59	55 to 59	55 to 59
60 to 64	60 to 64	60 to 64
65 to 74	65 to 74	65 to 74
75 to 84	75 to 84	75 to 84
85+	85+	85+

Source: Census 2011, MHCLG Household Projections (2014-based)

Table 8.57: Comparison of household types provided by Census commissioned tables, MHCLG Household Projections, and amalgamated output groups for analysis

Household type		
Census tables	**MHCLG Household Projections**	**Output group**
One person household	One person households: Male	One person households
	One person households: Female	
Couples: No children or all children non-dependent	One family and no others: Couple: No dependent children	Couples with no children or non-dependent children
	A couple and one or more other adults: No dependent children	
Couples: One or more dependent children	Households with one dependent child	Households with children
Lone parent: One or more dependent children	Households with two dependent children	
	Households with three dependent children	
Other household types	Other households	Other households

Source: Census 2011, MHCLG Household Projections (2014-based)

8.2 Market signals appendices

House prices

Table 8.58: Greater Manchester and England Average House Prices, year ending December 1995 to year ending March 2017

Date	Greater Manchester			England		
	Lower Quartile	Mean	Median	Lower Quartile	Mean	Median
Dec-95	£31,000	£50,079	£43,463	£39,995	£68,667	£55,000
Mar-96	£31,000	£49,858	£43,000	£39,950	£68,753	£55,000
Jun-96	£30,750	£49,854	£43,200	£40,000	£69,444	£55,350
Sep-96	£31,000	£50,408	£43,950	£40,000	£70,875	£56,500
Dec-96	£31,000	£51,114	£44,000	£41,000	£72,334	£57,500
Mar-97	£31,950	£51,975	£45,000	£41,500	£73,703	£58,000
Jun-97	£32,000	£53,136	£45,250	£42,500	£75,646	£59,500
Sep-97	£32,750	£54,328	£46,000	£43,000	£77,690	£59,995
Dec-97	£33,000	£55,060	£47,000	£43,950	£79,520	£60,000
Mar-98	£33,000	£55,338	£47,000	£44,000	£81,136	£62,475
Jun-98	£33,000	£56,133	£47,700	£45,000	£83,045	£64,000
Sep-98	£33,500	£56,883	£48,000	£45,000	£85,134	£65,000
Dec-98	£34,000	£57,724	£48,500	£45,995	£86,599	£66,000
Mar-99	£34,000	£58,361	£49,000	£46,500	£87,813	£67,000
Jun-99	£34,000	£59,108	£49,250	£47,300	£90,012	£68,500
Sep-99	£34,000	£60,506	£50,000	£48,500	£93,717	£71,000
Dec-99	£34,500	£62,078	£51,000	£50,000	£97,412	£74,000
Mar-00	£34,800	£63,264	£52,000	£51,000	£100,487	£75,200
Jun-00	£34,995	£64,440	£52,500	£52,000	£103,942	£78,000
Sep-00	£34,950	£65,556	£53,000	£53,000	£106,583	£79,950
Dec-00	£34,950	£66,424	£53,995	£53,995	£109,418	£81,995
Mar-01	£35,000	£67,111	£54,750	£54,950	£111,280	£83,500
Jun-01	£35,000	£68,830	£55,500	£56,000	£114,517	£86,000
Sep-01	£36,000	£71,200	£57,500	£58,500	£118,693	£89,950
Dec-01	£36,950	£72,941	£58,500	£59,950	£121,081	£92,000
Mar-02	£37,500	£74,528	£59,950	£60,000	£123,387	£95,000
Jun-02	£38,500	£77,675	£61,000	£64,000	£127,811	£99,000
Sep-02	£39,950	£81,239	£65,000	£67,000	£134,093	£106,000
Dec-02	£41,000	£85,120	£68,500	£70,250	£140,573	£114,000
Mar-03	£42,500	£88,174	£71,000	£74,500	£145,125	£118,500
Jun-03	£44,500	£90,895	£74,000	£77,000	£149,143	£123,000
Sep-03	£47,000	£94,757	£77,950	£80,000	£153,309	£127,000
Dec-03	£51,000	£100,175	£82,500	£85,000	£158,456	£132,000
Mar-04	£55,000	£103,914	£85,000	£89,000	£162,700	£135,500
Jun-04	£59,950	£109,868	£90,000	£94,500	£168,987	£141,000
Sep-04	£64,950	£116,717	£97,000	£99,950	£175,750	£147,500
Dec-04	£68,500	£121,402	£102,000	£105,000	£180,672	£151,000
Mar-05	£72,498	£125,725	£107,500	£108,000	£184,505	£155,000
Jun-05	£75,000	£129,160	£110,995	£110,000	£187,431	£157,000
Sep-05	£79,000	£131,318	£114,000	£112,500	£189,282	£158,000
Dec-05	£82,000	£134,502	£116,500	£115,000	£191,466	£159,950
Mar-06	£85,000	£136,491	£119,000	£115,500	£193,278	£160,000
Jun-06	£87,500	£140,057	£120,000	£118,000	£196,870	£162,000
Sep-06	£90,000	£143,515	£123,950	£119,995	£201,764	£165,000
Dec-06	£93,000	£146,586	£125,000	£122,000	£205,809	£168,000
Mar-07	£95,000	£149,326	£127,900	£124,000	£209,408	£170,000
Jun-07	£97,500	£152,404	£130,000	£125,000	£213,535	£173,000
Sep-07	£99,950	£154,495	£131,000	£125,000	£218,303	£175,000
Dec-07	£100,000	£155,887	£132,500	£127,000	£222,005	£178,000
Mar-08	£100,000	£156,580	£133,000	£128,000	£224,139	£179,950
Jun-08	£100,000	£155,900	£131,000	£127,000	£225,687	£180,000
Sep-08	£99,950	£154,291	£130,000	£125,000	£223,278	£177,500

Date	Greater Manchester			England		
	Lower Quartile	Mean	Median	Lower Quartile	Mean	Median
Dec-08	£95,000	£150,657	£125,000	£123,500	£219,916	£173,500
Mar-09	£92,000	£147,934	£124,750	£120,000	£216,364	£170,000
Jun-09	£89,950	£144,345	£121,000	£119,000	£211,168	£165,000
Sep-09	£88,000	£143,515	£120,000	£120,000	£211,974	£167,000
Dec-09	£90,000	£147,105	£125,000	£123,000	£216,263	£170,000
Mar-10	£90,000	£148,948	£125,000	£125,000	£222,694	£174,950
Jun-10	£90,000	£151,397	£125,000	£125,000	£229,060	£175,000
Sep-10	£90,000	£152,540	£125,000	£127,500	£235,450	£180,000
Dec-10	£88,500	£152,717	£125,000	£125,000	£239,899	£185,000
Mar-11	£88,000	£152,745	£125,000	£125,000	£240,117	£183,000
Jun-11	£87,000	£150,637	£124,750	£125,000	£239,407	£181,000
Sep-11	£85,000	£150,059	£123,500	£125,000	£237,868	£180,000
Dec-11	£85,000	£148,871	£123,000	£124,950	£236,493	£180,000
Mar-12	£85,000	£148,550	£124,000	£125,000	£234,586	£180,000
Jun-12	£85,500	£149,828	£124,500	£125,000	£237,115	£180,000
Sep-12	£86,500	£150,355	£124,999	£125,000	£239,416	£181,500
Dec-12	£87,500	£151,331	£125,000	£125,000	£242,232	£183,000
Mar-13	£88,000	£151,576	£125,000	£125,000	£245,164	£185,000
Jun-13	£88,000	£151,293	£125,000	£125,000	£245,910	£185,000
Sep-13	£89,500	£151,862	£125,000	£127,000	£248,809	£185,000
Dec-13	£90,000	£152,921	£125,246	£129,000	£251,620	£188,000
Mar-14	£90,750	£153,972	£128,000	£130,000	£254,056	£190,000
Jun-14	£93,000	£156,350	£130,000	£132,000	£258,029	£191,995
Sep-14	£95,000	£159,191	£133,000	£134,000	£262,165	£195,000
Dec-14	£95,000	£160,628	£134,950	£135,000	£265,557	£198,000
Mar-15	£97,000	£162,258	£135,000	£136,000	£268,067	£200,000
Jun-15	£98,500	£163,996	£137,000	£137,500	£270,055	£205,000
Sep-15	£100,000	£166,113	£139,995	£139,950	£273,123	£209,500
Dec-15	£100,000	£168,571	£141,500	£140,000	£277,291	£212,500
Mar-16	£100,000	£170,021	£142,000	£142,000	£282,657	£215,000
Jun-16	£102,500	£172,311	£144,995	£144,950	£285,143	£219,995
Sep-16	£105,000	£174,838	£145,000	£145,000	£285,936	£220,000
Dec-16	£106,000	£178,723	£148,000	£146,000	£288,512	£224,950
Mar-17	£109,995	£181,743	£150,000	£148,000	£288,581	£225,000

Source: ONS House Price Statistics for Small Areas (HPSSAs), Dataset 9: Median price paid, Dataset 12: Mean price paid and Dataset 15: Lower Quartile price paid

Rental trends

Table 8.59: Monthly rents for all property types recorded between 1 April 2016 to 31 March 2017 (£)

Area	Mean	Lower quartile	Median	Upper quartile
Bolton	551	450	500	595
Bury	598	495	575	675
Manchester	729	550	695	850
Oldham	538	450	500	595
Rochdale	497	425	465	550
Salford	640	500	595	725
Stockport	719	575	650	795
Tameside	528	450	500	575
Trafford	905	675	795	950
Wigan	496	425	475	550
Greater Manchester	628	475	553	700
North West	584	450	535	650
England	852	500	675	950

Source: VOA Private Rental Market Statistics

Table 8.60: Average two-bedroom rents (£)

Area	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18*	Annual Change	5 Year Change
Bolton	£455	£453	£463	£465	£469	£475	£488	£498	£510	2.4%	9.7%
Bury	£511	£491	£500	£511	£503	£526	£551	£567	£579	2.2%	13.4%
Manchester	£749	£745	£737	£724	£738	£764	£788	£816	£850	4.1%	17.4%
Oldham	£461	£453	£457	£469	£475	£486	£485	£505	£508	0.6%	8.3%
Rochdale	£453	£475	£469	£490	£450	£468	£470	£479	£506	5.7%	3.3%
Salford	£633	£601	£607	£598	£601	£632	£669	£712	£732	2.8%	22.4%
Stockport	£537	£540	£566	£583	£598	£609	£628	£650	£654	0.7%	12.2%
Tameside	£488	£480	£485	£486	£493	£495	£513	£527	£547	3.7%	12.5%
Trafford	£643	£661	£679	£690	£694	£711	£709	£738	£724	-1.9%	5.0%
Wigan	£471	£466	£456	£448	£453	£460	£460	£472	£481	2.0%	7.5%
Greater Manchester	£655	£636	£613	£596	£598	£617	£623	£649	£675	3.9%	13.2%

Source: Zoopla

**2017-18 figures include up to the end of February 2018*

Table 8.61: Average monthly rents (£)

Area	Year to 31 March 2014	Year to 31 March 2017	% Increase
Bolton	472	551	19.7%
Bury	512	598	13.9%
Manchester	575	729	45.4%
Oldham	503	538	8.8%
Rochdale	485	497	1.1%
Salford	577	640	16.6%
Stockport	639	719	19.6%
Tameside	506	528	5.8%
Trafford	802	905	27.2%
Wigan	477	496	4.4%
Greater Manchester	542	628	19.5%
North West	532	584	12.4%
England	720	852	22.8%

Source: VOA Private Rental Market Statistics

Households in need and affordability

Table 8.62: Households on housing registers by reasonable preference, 2016/17

Area	Total households on the housing register	Total households on the housing register in a reasonable preference category	Total households on the housing register not in a reasonable preference category
Bolton	25,574	1,608	23,966
Bury	1,205	691	514
Manchester	12,406	4,697	7,709
Oldham	16,274	3,858	12,416
Rochdale	6,129	811	5,318
Salford	6,826	6,677	149
Stockport	5,770	2,935	2,835
Tameside	3,425	301	3,124
Trafford	4,053	1,163	2,890
Wigan	3,977	1,302	2,675
Greater Manchester	85,639	24,043	61,596

Source: Local Authority Housing Statistics dataset, England 2016-17: Section C - Allocations

Table 8.63: Households on the housing register by bedroom need, 2016/17

Area	1 bedroom	2 bedrooms	3 bedrooms	4 or more bedrooms	Unspecified number of bedrooms or those on the register more than once*
Bolton	5,559	2,150	1,106	575	16,184
Bury	642	319	211	33	0
Manchester	5,433	3,893	2,106	974	0
Oldham	8,275	4,539	2,511	949	0
Rochdale	3,031	1,768	927	403	0
Salford	4,177	1,653	714	282	0
Stockport	3,200	1,883	620	67	0
Tameside	1,602	1,139	496	186	2
Trafford	1,980	1,369	575	129	0
Wigan	2,205	1,172	466	134	0
Greater Manchester	36,104	19,885	9,732	3,732	16,186

Source: Local Authority Housing Statistics dataset, England 2016-17: Section C – Allocations

Note that data for households listed as requiring 'Unspecified number of bedrooms or those on the register more than once' were excluded from the analysis in Figure 5.12.

Table 8.64: Social housing lettings by number of bedrooms, 2016/17

Area	1 bedroom	2 bedrooms	3 bedrooms	4 or more bedrooms
Bolton	670	720	437	25
Bury	430	284	112	1
Manchester	1,033	1,027	751	68
Oldham	581	632	274	30
Rochdale	752	526	310	20
Salford	783	1,043	384	42
Stockport	461	308	115	6
Tameside	654	621	238	12
Trafford	357	344	131	15
Wigan	634	717	463	7
Greater Manchester	6,355	6,222	3,215	226

Source: MHCLG Social Lettings Local Authority Live Tables 2016-17

Table 8.65: Total stock owned by local authorities and Private Registered Providers, 2018

Area	Local Authority stock	Private Registered Provider stock
Bolton	0	25,501
Bury	8,000	4,773
Manchester	16,110	51,109
Oldham	2,065	18,708
Rochdale	0	20,877
Salford	1,235	30,018
Stockport	11,286	6,223
Tameside	0	22,250
Trafford	0	15,579
Wigan	22,165	3,799
Greater Manchester	60,861	198,837

Source: Local Authority Housing Statistics dataset (including imputed data), England 2016-17: Section A - Dwelling Stock; Private Registered Provider Social Housing Stock in England: Statistical Data Return dataset 2018

Table 8.66: Social housing stock by type, 2017/18

Area	General needs	Supported Housing	Housing for older people	Local authority stock	Total
Bolton	20,880	789	3,832	0	25,501
Bury	3,831	374	568	8,000	12,773
Manchester	46,322	1,562	3,225	16,110	67,219
Oldham	17,473	556	679	2,065	20,773
Rochdale	18,283	548	2,046	0	20,877
Salford	27,125	1,567	1,326	1,235	31,253
Stockport	4,436	410	1,377	11,286	17,509
Tameside	20,123	551	1,576	0	22,250
Trafford	11,758	481	3,340	0	15,579
Wigan	2,070	709	1,020	22,165	25,964
Greater Manchester	172,301	7,547	18,989	60,861	259,698

Source: Local Authority Housing Statistics dataset (including imputed data), England 2016-17: Section A - Dwelling Stock; Private Registered Provider Social Housing Stock in England: Statistical Data Return dataset 2018

Table 8.67: Average weekly social and affordable rents and weekly median and lower quartile private rents, 2017/18

Area	Average weekly social rent	Average weekly affordable rent	Weekly lower quartile private rent	Weekly median private rent
Bolton	£83.89	£96.68	£103.85	£121.15
Bury	£79.05	£101.26	£115.38	£137.31
Manchester	£77.59	£102.94	£138.46	£173.08
Oldham	£77.51	£103.12	£108.46	£121.15
Rochdale	£80.68	£97.83	£98.08	£109.62
Salford	£82.39	£118.84	£126.92	£150.00
Stockport	£81.09	£111.30	£137.31	£155.77
Tameside	£82.48	£101.74	£108.46	£121.15
Trafford	£86.62	£110.09	£155.77	£183.46
Wigan	£80.92	£95.56	£98.08	£109.62
Greater Manchester	£79.28	£103.60	£114.23	£137.31

Source: Valuation Office Agency, Private Rental Market Statistics, 2018; Local Authority Housing Statistics dataset, England 2016-17: Section H - Rents and Rent Arrears; Private Registered Provider Social Housing Stock in England: Statistical Data Return dataset 2018

Table 8.68: Lower quartile and median private rent to income ratios, 2017/18

Area	Median household income	Median private rent	Monthly household income	Ratio of median private rent to household income
Bolton	£24,848	£525	£2,071	0.25
Bury	£28,028	£595	£2,336	0.25
Manchester	£24,137	£750	£2,011	0.37
Oldham	£23,917	£525	£1,993	0.26
Rochdale	£24,400	£475	£2,033	0.23
Salford	£25,286	£650	£2,107	0.31
Stockport	£27,563	£675	£2,297	0.29
Tameside	£23,414	£525	£1,951	0.27
Trafford	£33,970	£795	£2,831	0.28
Wigan	£27,092	£475	£2,258	0.21
Greater Manchester	£26,266	£595	£2,189	0.27

Source: Valuation Office Agency Private Rental Market Statistics, 2018; ONS Ratio of house price to workplace-based earnings, 2017

Table 8.69: Ratio of lower quartile house prices to lower quartile earnings, 2016

Area	Ratio of lower quartile house price to lower quartile earnings
Bolton	4.57
Bury	5.92
Manchester	5.31
Oldham	5.01
Rochdale	4.92
Salford	5.18
Stockport	6.92
Tameside	5.58
Trafford	8.47
Wigan	4.68

Source: ONS Ratio of house price to workplace-based earnings (lower quartile and median), 1997 to 2016, Table 6c: Ratio of lower quartile house price to lower quartile gross annual (where available) workplace-based earnings by local authority district, England and Wales, 1997 to 2016

Table 8.70: Average monthly private rents, annual household incomes and 30% of average monthly incomes, 2017/18

Area	Mean Monthly Rent	Median Monthly Rent	Lower Quartile Monthly Rent	Mean annual household income	Median annual household income	Lower Quartile annual household income	30% of mean monthly household income	30% median monthly household income	30% lower quartile monthly household income
Bolton	£582	£525	£450	£32,837	24,848	£18,517	£821	£621	£463
Bury	£624	£595	£500	£37,346	28,028	£20,253	£934	£701	£506
Manchester	£801	£750	£600	£29,820	24,137	£17,977	£745	£603	£449
Oldham	£551	£525	£470	£31,505	23,917	£18,476	£788	£598	£462
Rochdale	£499	£475	£425	£31,171	24,400	£18,165	£779	£610	£454
Salford	£720	£650	£550	£31,492	25,286	£19,026	£787	£632	£476
Stockport	£731	£675	£595	£40,649	27,563	£20,187	£1,016	£689	£505
Tameside	£541	£525	£470	£31,691	23,414	£17,995	£792	£585	£450
Trafford	£885	£795	£675	£43,682	33,970	£23,692	£1,092	£849	£592
Wigan	£503	£475	£425	£33,044	27,092	£19,173	£826	£677	£479
Greater Manchester	£667	£595	£495	£33,886	£26,266	£19,346	£847	£657	£484

Sources: Valuation Office Agency Private Rental Market Statistics, 2018; CACI Paycheck 2017; ONS Ratio of house price to residence-based earnings (lower quartile and median)

Development rates

Table 8.71: Net additional dwellings in Greater Manchester, 2004/05 – 2016/17

Area	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18	% Change 2016-17 to 2017-18
Bolton	560	890	1,060	1,300	660	500	460	530	340	330	470	510	437	483	10.5
Bury	750	940	380	410	300	230	280	220	270	270	540	340	368	275	-25.3
Manchester	3,300	3,010	4,900	5,470	2,220	1,820	880	870	2,230	610	890	1,760	1,792	2,974	66.0
Oldham	30	150	210	330	320	-160	-10	10	250	330	490	260	326	313	-4.0
Rochdale	130	480	220	510	470	130	280	450	450	270	310	310	315	799	153.7
Salford	600	520	1,840	2,720	1,670	600	570	150	550	840	980	1,100	2,482	1,479	-40.4
Stockport	260	340	650	480	180	60	40	200	380	370	430	320	660	738	11.8
Tameside	460	760	640	870	730	330	460	410	550	400	400	590	365	484	32.6
Trafford	620	560	590	810	350	280	260	200	110	150	380	360	330	468	41.8
Wigan	1,360	1,220	1,740	1,930	1,240	960	910	360	220	600	530	640	817	948	16.0
Greater Manchester	8,080	8,880	12,220	14,850	8,140	4,750	4,130	3,390	5,350	4,160	5,420	6,190	7,892	8,961	13.5
England	185,550	202,650	214,940	223,530	182,770	144,870	137,390	134,900	124,720	136,610	170,690	189,650	217,345	222,194	2.2

Source: MHCLG Live Table 122 Net additional dwellings by local authority district, England 2004-05 to 2016-18

Overcrowding, under-occupation and concealed families

Table 8.72: Change in number and proportion of concealed families 2001 - 2011

Area	Number of concealed families		Absolute change 2001-2011	% of families 'concealed'	
	2001	2011		2001	2011
Bolton	939	1,535	596	1.27%	1.96%
Bury	536	828	292	1.03%	1.56%
Manchester	1,412	2,814	1,402	1.54%	2.46%
Oldham	995	1,647	652	1.62%	2.62%
Rochdale	898	1,347	449	1.56%	2.28%
Salford	585	891	306	1.01%	1.43%
Stockport	780	1,264	484	0.95%	1.53%
Tameside	660	1,098	438	1.08%	1.73%
Trafford	688	1,024	336	1.16%	1.58%
Wigan	812	1,195	383	0.91%	1.25%
Greater Manchester	8,305	13,643	5,338	1.21%	1.85%
North West	21,162	32,128	10,966	1.11%	1.62%
England	161,254	275,954	114,700	1.16%	1.85%

Source: Census 2011

Vacancy levels

Table 8.73: Dwelling stock estimates by local authority district: 2006 - 2017

Area	Number of dwellings (at 31st March)											
	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bolton	116,820	117,880	119,180	119,840	120,350	120,800	121,330	121,670	122,000	122,470	122,980	123,420
Bury	79,820	80,190	80,610	80,910	81,140	81,420	81,640	81,920	82,180	82,730	83,060	83,430
Manchester	198,240	203,140	208,610	210,830	212,650	213,530	214,400	216,630	217,240	218,130	219,890	221,680
Oldham	92,310	92,520	92,850	93,170	93,010	93,000	93,010	93,260	93,580	94,080	94,340	94,660
Rochdale	88,360	88,580	89,090	89,560	89,690	89,970	90,420	90,870	91,140	91,450	91,760	92,070
Salford	101,210	103,040	105,770	107,440	108,030	108,610	108,760	109,300	110,150	111,120	112,220	114,700
Stockport	124,410	125,050	125,540	125,720	125,770	125,810	126,010	126,380	126,760	127,190	127,510	128,170
Tameside	96,110	96,750	97,620	98,350	98,680	99,150	99,550	100,100	100,510	100,900	101,500	101,860
Trafford	94,840	95,430	96,240	96,590	96,870	97,130	97,330	97,430	97,580	97,960	98,320	98,650
Wigan	134,730	136,480	138,410	139,640	140,610	141,520	141,880	142,100	142,690	143,220	143,860	144,680
Greater Manchester	1,126,840	1,139,070	1,153,910	1,162,050	1,166,800	1,170,930	1,174,320	1,179,660	1,183,830	1,189,240	1,195,430	1,203,320
England	22,073,000	22,288,000	22,511,000	22,694,000	22,839,000	22,976,000	23,111,000	23,236,000	23,372,000	23,543,000	23,733,000	23,950,000

Source: MHCLG Live Table 125: Dwelling stock estimates by local authority district: 2006-2017

Table 8.74: Percentage of dwellings that are vacant 2004 – 2017

Area	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bolton	2.1	4.8	4.9	5.1	5.4	5.2	4.8	4.2	4.0	4.0	3.8	3.8	3.0	2.8
Bury	3.0	3.4	3.9	3.6	4.1	3.7	3.6	3.7	3.6	3.5	3.2	3.1	3.2	3.0
Manchester	7.7	6.8	7.0	7.3	7.3	6.9	5.8	5.2	3.4	2.5	2.2	1.8	1.7	1.7
Oldham	4.8	5.2	5.2	5.5	5.7	5.4	5.4	4.9	4.4	4.1	3.7	3.3	3.2	3.1
Rochdale	4.4	4.0	4.1	4.0	4.6	4.3	4.2	3.9	4.0	3.4	3.4	3.3	3.0	2.9
Salford	6.2	6.2	6.2	6.0	5.9	6.1	5.8	4.2	3.3	3.0	3.0	3.1	2.4	2.4
Stockport	2.4	2.5	2.8	2.8	3.1	3.0	2.8	2.7	2.7	2.8	2.6	2.5	2.3	2.4
Tameside	4.2	4.5	4.6	4.5	4.7	4.3	3.8	3.7	3.4	2.9	2.9	2.5	2.5	2.5
Trafford	4.1	3.6	3.0	3.2	3.5	3.2	2.8	3.0	2.7	2.5	2.1	2.2	2.4	2.4
Wigan	2.9	3.2	3.6	3.7	4.0	3.9	3.7	3.8	3.7	3.5	3.2	2.9	2.9	2.9
Greater Manchester	4.4	4.6	4.7	4.8	5.0	4.8	4.4	4.0	3.5	3.2	2.9	2.7	2.5	2.5
England	3.3	3.3	3.4	3.4	3.5	3.4	3.2	3.1	3.0	2.7	2.6	2.5	2.5	2.5

Source: MHCLG Live Table 615 All vacant dwellings by local authority district, England, 2004-2017 and MHCLG Live Table 125: Dwelling stock estimates by local authority district: 2004-2017

Table 8.75: Percentage of dwellings that are long-term empty 2004 – 2017

Area	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Bolton*	0.0	2.6	2.6	2.6	2.8	2.6	2.5	1.7	1.6	1.3	1.3	1.3	1.2	1.1
Bury	1.4	1.5	1.6	1.8	1.9	1.7	1.6	1.8	1.5	1.2	1.1	1.1	1.3	1.1
Manchester	5.9	5.2	5.6	5.5	5.3	4.8	4.2	3.8	1.8	1.2	0.9	0.7	0.6	0.6
Oldham	2.6	2.3	2.7	2.5	2.6	2.0	2.0	1.9	1.6	1.4	1.3	1.3	1.3	1.2
Rochdale	2.4	2.1	2.2	2.0	2.3	2.1	1.9	1.9	1.7	1.2	1.1	1.1	1.0	0.9
Salford	2.5	2.8	3.2	3.2	3.7	3.6	3.5	2.1	1.4	1.0	0.8	1.0	0.9	0.9
Stockport	0.8	0.8	1.0	1.1	1.2	1.3	1.2	1.1	1.1	1.0	0.9	0.8	0.9	0.9
Tameside	2.4	2.5	2.4	2.3	2.3	2.1	1.9	1.7	1.3	1.2	1.1	1.0	1.0	1.1
Trafford	0.9	1.2	1.2	1.4	1.4	1.4	1.1	1.1	1.0	0.9	0.6	0.7	0.7	0.7
Wigan	1.2	1.2	1.5	1.6	1.8	1.8	1.6	1.6	1.6	1.3	1.2	1.1	0.9	0.9
Greater Manchester	2.3	2.4	2.6	2.7	2.8	2.6	2.3	2.0	1.5	1.2	1.0	1.0	0.9	0.9
England	1.5	1.4	1.4	1.4	1.5	1.4	1.3	1.2	1.1	0.9	0.9	0.9	0.8	0.9

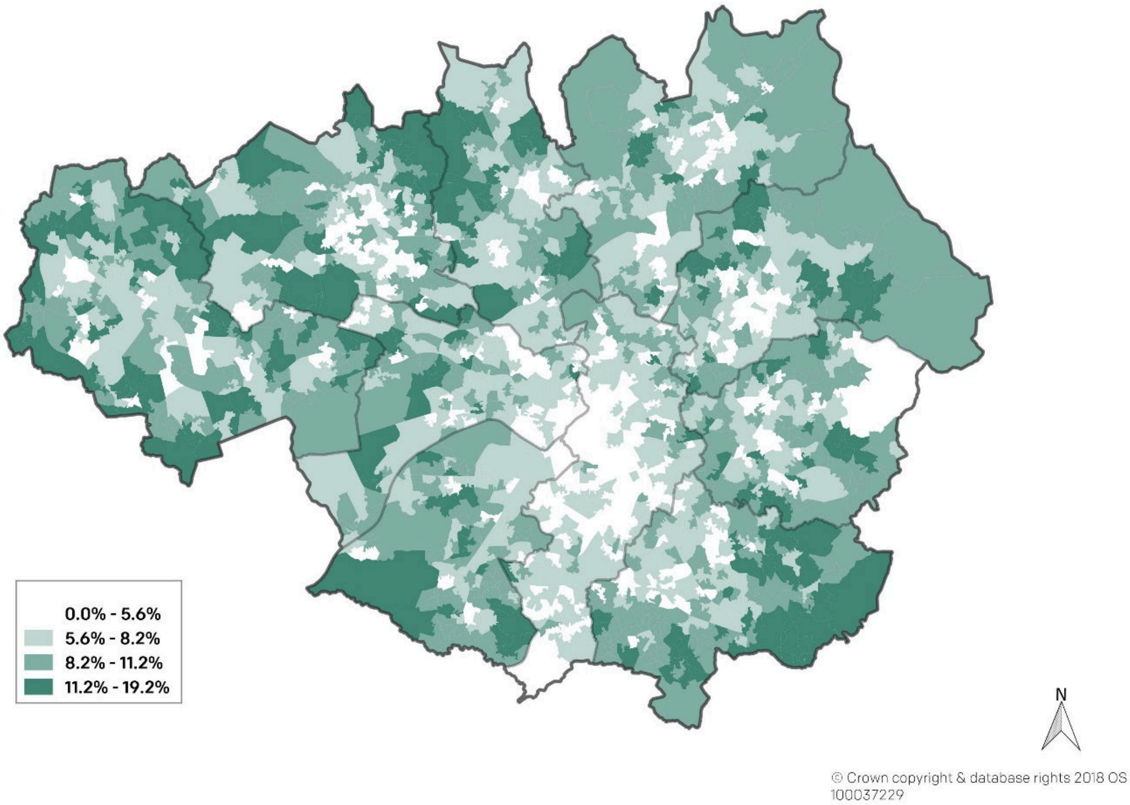
Source: MHCLG Live Table 615 All long-term vacant dwellings by local authority district, England, 2004-2017 and MHCLG Live Table 125: Dwelling stock estimates by local authority district: 2004-2017

** Apparent erroneous figure recorded for Bolton in 2004*

8.3 Housing needs of particular groups appendices

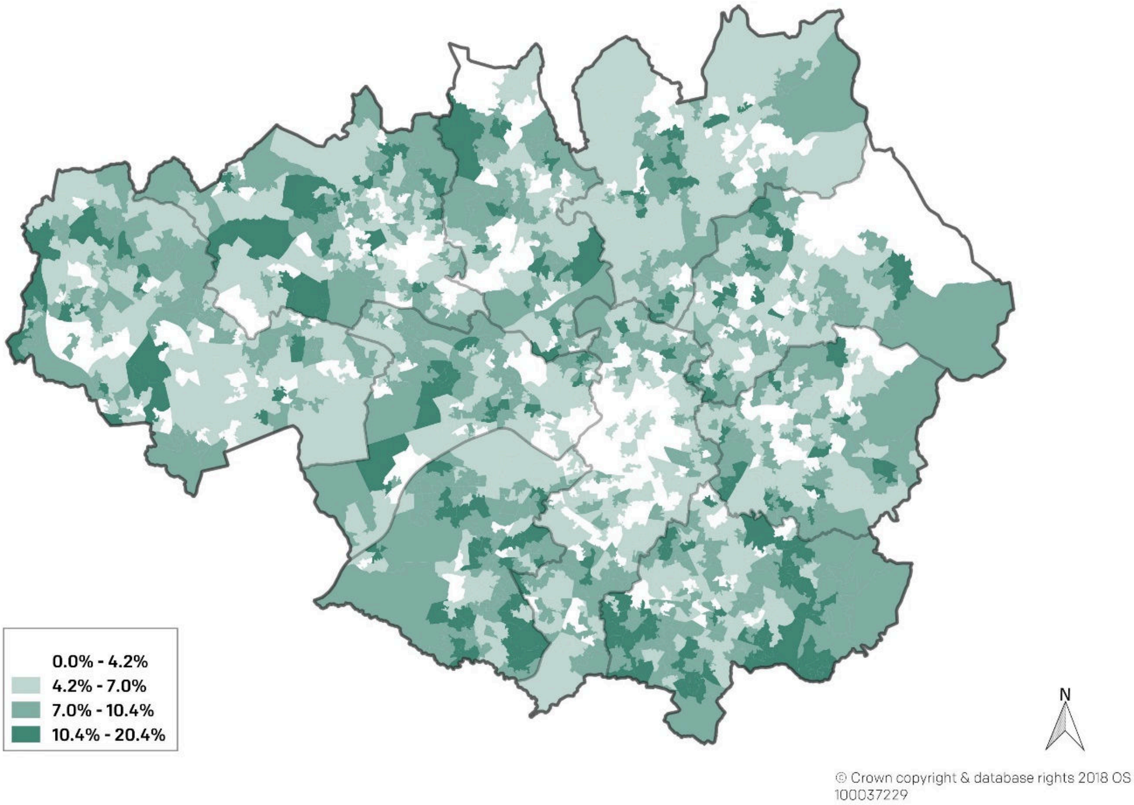
Older persons housing

Map 8.1: Spatial Distribution of Older People in Greater Manchester – percentage of population aged 65 to 74



Source: Census 2011

Map 8.2: Spatial Distribution of Older People in Greater Manchester – percentage of population aged over 75



Source: Census 2011

Table 8.76: 20 wards in Greater Manchester with the highest population aged Over 55

Ward	District	Percentage of All Population Aged Over 55
Marple South	Stockport	56.2%
North Manor	Bury	55.3%
Marple North	Stockport	55.1%
Bramhall South	Stockport	54.7%
Bowdon	Trafford	52.2%
Church	Bury	51.8%
Hale Barns	Trafford	51.7%
Saddleworth South	Oldham	51.7%
Saddleworth North	Oldham	51.6%
Heaton and Lostock	Bolton	51.0%
Bramhall North	Stockport	50.9%
Bradshaw	Bolton	50.4%
Crompton	Oldham	50.0%
Shevington with Lower Ground	Wigan	49.7%
South Middleton	Rochdale	49.4%
Royton North	Oldham	49.3%
Wigan Central	Wigan	48.9%
Orrell	Wigan	48.8%
Davyhulme West	Trafford	48.8%
Heald Green	Stockport	48.7%

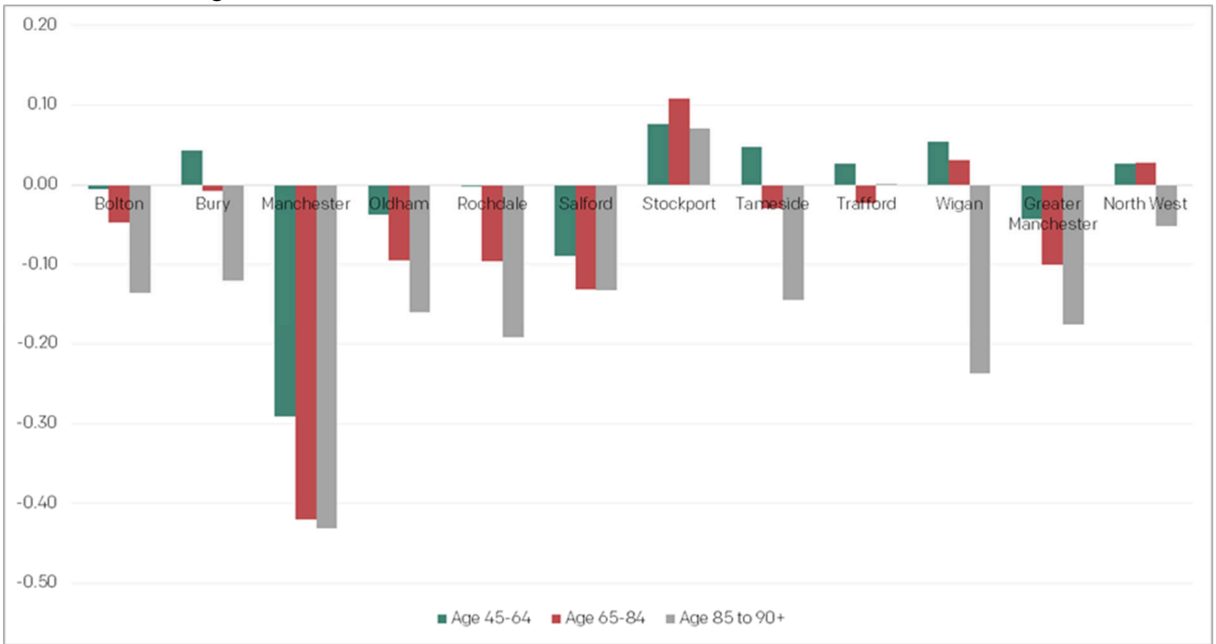
Source: Census 2011

Table 8.77: 20 wards in Greater Manchester with the lowest population aged Over 55

Ward	District	Percentage of All Population Aged Over 55
City Centre	Manchester	7.60%
Hulme	Manchester	13.20%
Ardwick	Manchester	17.80%
Withington	Manchester	18.10%
Ordsall	Salford	18.60%
Moss Side	Manchester	19.00%
Longsight	Manchester	19.30%
Rusholme	Manchester	20.30%
Cheetham	Manchester	20.50%
Fallowfield	Manchester	21.50%
Old Moat	Manchester	22.90%
Levenshulme	Manchester	23.80%
Irwell Riverside	Salford	23.80%
Coldhurst	Oldham	23.90%
Ancoats and Clayton	Manchester	24.10%
St Mary's	Oldham	24.70%
Werneth	Oldham	25.50%
Gorton South	Manchester	26.30%
Whalley Range	Manchester	27.00%
Didsbury West	Manchester	27.30%

Source: Census 2011

Figure 8.1: Population Density of Older People in Greater Manchester Compared to the National Average



Source: Census 2011

**0 represents a proportion equal to the national average and deviations representing percentage differences*

Table 8.78: Households Over 65

Area	Total Number of Households	Number of Households Over 65	Percentage of All Households Over 65
Bolton	116,371	23,217	20.0%
Bury	78,113	15,835	20.3%
Manchester	204,969	25,667	12.5%
Oldham	89,703	17,721	19.8%
Rochdale	87,552	16,605	19.0%
Salford	103,556	18,701	18.1%
Stockport	121,979	27,923	22.9%
Tameside	94,953	18,788	19.8%
Trafford	94,484	19,747	20.9%
Wigan	136,386	27,255	20.0%
Greater Manchester	1,128,066	211,459	18.7%
North West	3,009,549	629,481	20.9%
England	22,063,368	4,576,776	20.7%

Source: Census 2011

Table 8.79: Absolute Net Change in England and Wales of Usual Residents Aged 65 and Over (2015)

Area	Net Gains of those Aged Over 65
Wiltshire	699
Tendring	587
Shropshire	541
Arun	515
Taunton Deane	426
North Somerset	401
East Riding of Yorkshire	385
Breckland	381
East Devon	358
Eastbourne	333

Area	Net Losses of those Aged Over 65
Birmingham	-1,640
Bristol, City of	-982
Bromley	-907
Redbridge	-864
Enfield	-847
Lewisham	-844
Brent	-834
Ealing	-806
Haringey	-805
Harrow	-789
Westminster	-726

Source: ONS, 2015

Table 8.80: Absolute Net Change in Greater Manchester of Usual Residents Aged 65 and Over (2015)

Area	Net Change of those aged Over 65
Bolton	-243
Bury	-28
Manchester	-287
Oldham	-131
Rochdale	-92
Salford	-113
Stockport	-76
Tameside	-22
Trafford	-180
Wigan	-31
Greater Manchester	-1,203

Source: ONS, 2015

Table 8.81: Life and Healthy Life Expectancy

Area	Male Life Expectancy (years)	Male Healthy Life Expectancy (years)	Female Life Expectancy (years)	Female Healthy Life Expectancy (years)
Bolton	78.0	61.5	81.6	61.8
Bury	78.0	61.5	81.5	60.4
Manchester	75.8	56.1	79.9	54.4
Oldham	77.4	60.5	80.7	58.9
Rochdale	77.2	59.9	80.8	57.6
Salford	76.7	57.2	80.7	58.3
Stockport	79.9	65.5	83.0	65.8
Tameside	77.3	58.8	80.6	58.8
Trafford	79.9	65.2	83.7	64.4
Wigan	77.7	59.7	81.3	61.3
Greater Manchester (Average)	77.8	60.6	81.4	60.2
North West	78.1	61.1	81.9	61.8
England	79.5	63.4	83.2	64.0

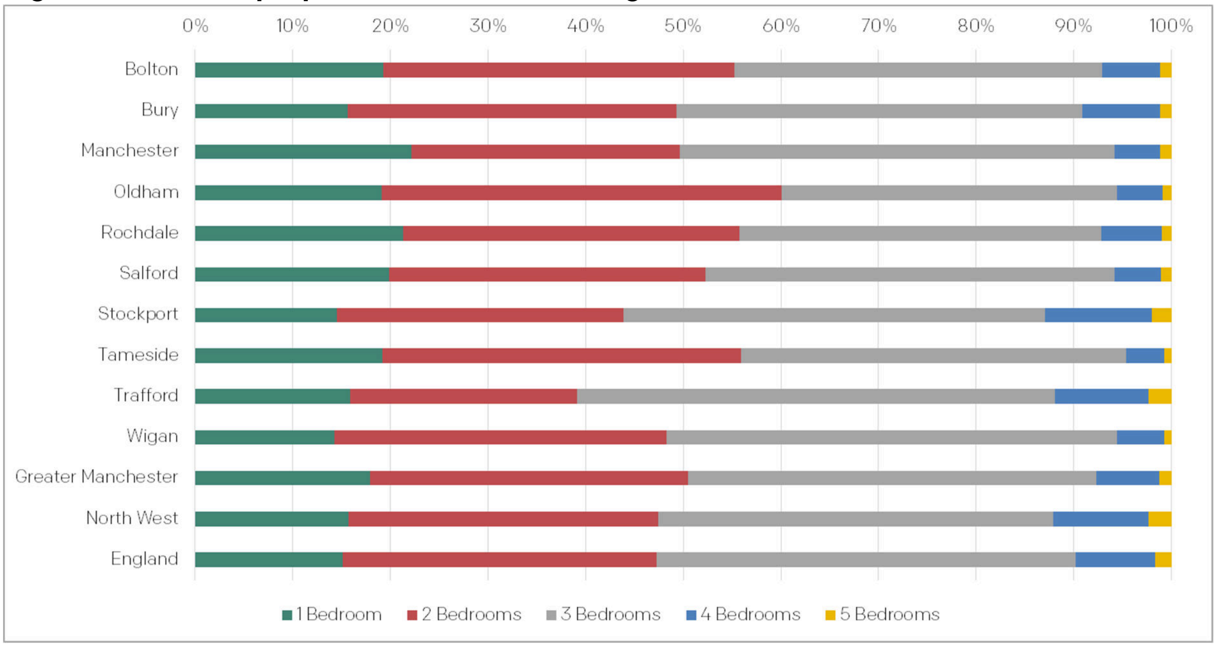
Source: ONS

Table 8.82: Under-occupation household over 65 with over 2 bedrooms

Area	All Households (All Ages)	Number of Households Occupied by those Aged Over 65	Number of Households Occupied Households Over 65s with 2 or More Bedrooms	% of Over 65 Households with 2 or More Bedrooms
Bolton	116,371	23,217	10,245	44.10%
Bury	78,113	15,835	7,922	50.00%
Manchester	204,969	25,667	12,570	49.00%
Oldham	89,703	17,721	7,006	39.50%
Rochdale	87,552	16,605	7,252	43.70%
Salford	103,556	18,701	8,760	46.80%
Stockport	121,979	27,923	15,471	55.40%
Tameside	94,953	18,788	8,163	43.40%
Trafford	94,484	19,747	11,838	59.90%
Wigan	136,386	27,255	13,905	51.00%
Greater Manchester	1,128,066	211,459	103,132	48.80%
North West	3,009,549	629,481	326,160	51.80%
England	22,063,368	4,576,776	2,363,644	51.60%

Source: Census 2011

Figure 8.2: Size of properties of households aged over 65



Source: Census 2011

Table 8.83: Percentage of All Properties Occupied by Over 65s (where all tenants are over 65)

Area	Number of Bedrooms					
	1	2	3	4	5	All
Bolton	37.1%	21.1%	18.2%	10.4%	7.7%	20.0%
Bury	35.2%	22.5%	19.2%	11.9%	7.4%	20.3%
Manchester	16.8%	10.8%	13.8%	7.6%	4.3%	12.5%
Oldham	41.2%	21.7%	16.7%	9.1%	6.5%	19.8%
Rochdale	35.2%	20.4%	16.6%	10.3%	6.9%	19.0%
Salford	26.5%	17.0%	18.4%	10.1%	7.5%	18.1%
Stockport	35.3%	24.8%	22.4%	16.7%	10.7%	22.9%
Tameside	36.1%	20.8%	17.9%	8.5%	7.4%	19.8%
Trafford	36.0%	21.4%	21.4%	13.5%	9.0%	20.9%
Wigan	38.1%	23.2%	18.5%	8.5%	7.7%	20.0%
Greater Manchester	30.2%	19.4%	18.1%	10.9%	7.5%	18.7%
North West	32.4%	23.6%	19.9%	13.0%	9.5%	20.9%
England	27.2%	23.6%	20.3%	14.2%	10.4%	20.7%

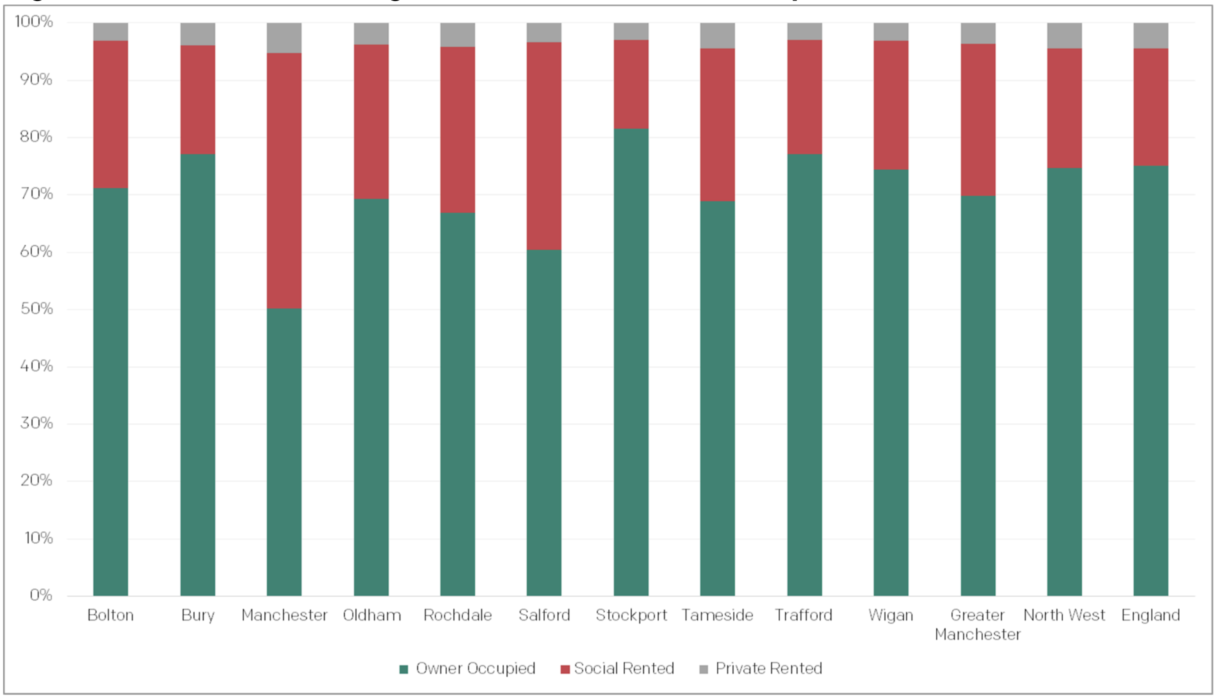
Source: Census 2011

Table 8.84: Percentage of one person households by age band in Greater Manchester

Area	Age band				
	55-59	60-64	65-74	75-84	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%
Greater Manchester	30.0%	35.3%	42.0%	55.1%	70.7%

Source: Census 2011 CT0345 - Age of Household Reference Person (HRP) by household composition by tenure by bespoke accommodation type (excluding caravans and temporary structures) by number of bedrooms

Figure 8.3: Tenure of housing for over 65s (where all occupiers are over 65)



Source: Census 2011

Table 8.85: Population with a long term health problem or disability

Area	Number	%
Bolton	53,612	19.5%
Bury	33,248	18.2%
Manchester	86,048	17.9%
Oldham	42,727	19.1%
Rochdale	42,722	20.4%
Salford	46,691	20.4%
Stockport	50,151	17.9%
Tameside	44,504	20.4%
Trafford	37,410	16.6%
Wigan	66,555	21.1%
Greater Manchester	503,668	19.1%
North West	1,369,604	19.8%
England	9,608,162	17.4%

Source: Census 2011

Table 8.86: Population: daily activities limited 'a lot' by long term health problem or disability

Area	Number	%
Bolton	26,668	9.7%
Bury	15,586	8.5%
Manchester	45,263	9.4%
Oldham	21,234	9.5%
Rochdale	21,452	10.2%
Salford	24,444	10.7%
Stockport	22,792	8.1%
Tameside	22,199	10.2%
Trafford	17,247	7.7%
Wigan	33,413	10.6%
Greater Manchester	250,298	9.5%
North West	681,402	9.8%
England	4,444,433	8.1%

Source: Census 2011

Table 8.87: Population limited 'a lot' by a long term health problem or disability, 2011

Area	Age 0-15		Age 16-49		Age 50-64		Age 65+	
	Number	%	Number	%	Number	%	Number	%
Bolton	928	1.6%	6,191	4.9%	7,223	14.5%	12,326	29.8%
Bury	584	1.6%	3,449	4.1%	4,164	12.1%	7,389	26.1%
Manchester	1,914	2.0%	13,422	4.8%	12,967	21.2%	16,960	37.2%
Oldham	976	1.9%	5,042	4.9%	5,893	15.1%	9,323	29.6%
Rochdale	769	1.7%	5,335	5.5%	6,228	16.3%	9,120	30.8%
Salford	853	1.9%	5,997	5.3%	6,654	17.6%	10,940	34.2%
Stockport	853	1.6%	4,709	3.8%	5,542	10.1%	11,688	23.7%
Tameside	674	1.6%	5,298	5.2%	6,189	15.1%	10,038	30.5%
Trafford	595	1.3%	3,662	3.5%	4,267	10.5%	8,723	24.8%
Wigan	888	1.5%	7,134	4.9%	9,252	15.4%	16,139	32.3%
Greater Manchester	9,034	1.7%	60,239	4.7%	68,379	14.9%	112,646	30.0%
North West	22,305	1.7%	150,080	4.7%	182,214	13.9%	326,803	29.0%
England	163,214	1.5%	935,384	3.7%	1,084,291	10.7%	2,261,544	25.5%

Source: Census 2011

Table 8.88: Population with a long term health problem or disability, by tenure, 2011

Area	Owner-occupation			Renting		
	Owned outright	Owned with mortgage, loan or shared ownership	Total	Social rented	Private rented or living rent free	Total
Bolton	21,682	10,439	32,121	15,787	5,704	21,491
Bury	14,400	7,530	21,930	7,799	3,519	11,318
Manchester	19,497	13,298	32,795	40,605	12,648	53,253
Oldham	16,869	8,747	25,616	12,521	4,590	17,111
Rochdale	15,452	8,961	24,413	13,432	4,877	18,309
Salford	14,483	7,607	22,090	19,427	5,174	24,601
Stockport	23,687	11,153	34,840	10,949	4,362	15,311
Tameside	16,983	9,267	26,250	13,540	4,714	18,254
Trafford	16,644	7,961	24,605	9,680	3,125	12,805
Wigan	29,284	13,319	42,603	17,773	6,179	23,952
Greater Manchester	188,981	98,282	287,263	161,513	54,892	216,405
North West	569,349	272,729	842,078	370,060	157,466	527,526
England	4,072,075	1,878,182	5,950,257	2,571,218	1,086,687	3,657,905

Source: Census 2011

Table 8.89: Population limited 'a lot' by a long term health problem or disability, by tenure, 2011

Area	Owner-occupation			Renting		
	Owned outright	Owned with mortgage, loan or shared ownership	Total	Social rented	Private rented or living rent free	Total
Bolton	10,172	4,361	14,533	9,226	2,909	12,135
Bury	6,372	2,961	9,333	4,543	1,710	6,253
Manchester	9,842	5,820	15,662	23,751	5,850	29,601
Oldham	7,920	3,752	11,672	7,201	2,361	9,562
Rochdale	7,224	3,819	11,043	7,893	2,516	10,409
Salford	7,178	3,269	10,447	11,382	2,615	13,997
Stockport	10,169	4,265	14,434	6,257	2,101	8,358
Tameside	7,964	3,979	11,943	7,840	2,416	10,256
Trafford	7,177	3,155	10,332	5,404	1,511	6,915
Wigan	14,182	5,685	19,867	10,279	3,267	13,546
Greater Manchester	88,200	41,066	129,266	93,776	27,256	121,032
North West	265,876	116,430	382,306	218,854	80,242	299,096
England	1,774,600	739,095	2,513,695	1,429,602	501,136	1,930,738

Source: Census 2011

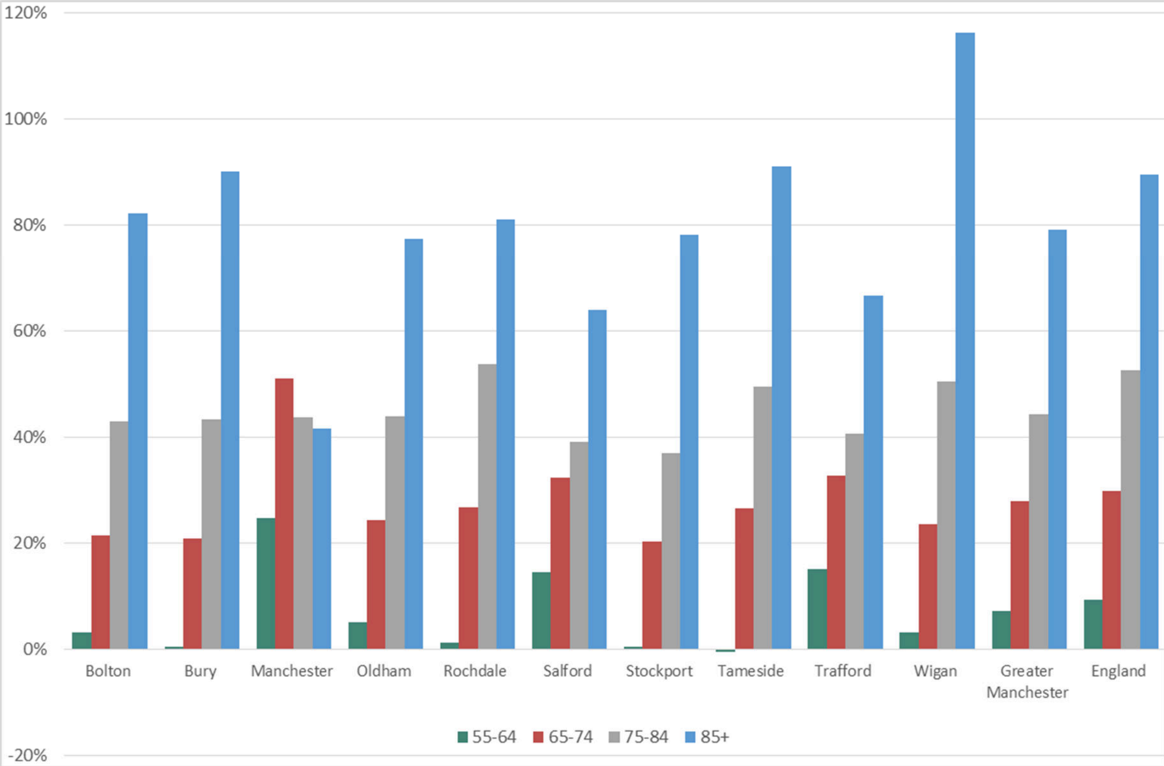
Table 8.90: Population limited 'a lot' by a long term health problem or disability, by tenure

Area	Owner-occupation			Renting			Total
	Owned outright	Owned with mortgage, loan or shared ownership	Total	Social rented	Private rented or living rent free	Total	
Bolton	13.8%	3.9%	7.8%	18.4%	7.5%	13.6%	9.7%
Bury	13.1%	3.5%	7.0%	19.8%	6.5%	12.7%	8.5%
Manchester	15.3%	4.5%	8.1%	16.9%	4.0%	10.3%	9.4%
Oldham	13.6%	4.0%	7.6%	17.6%	8.1%	13.6%	9.5%
Rochdale	14.3%	4.3%	7.9%	18.9%	8.7%	14.8%	10.2%
Salford	16.7%	4.0%	8.4%	19.2%	5.8%	13.5%	10.7%
Stockport	12.4%	3.2%	6.7%	19.8%	6.5%	13.0%	8.1%
Tameside	15.4%	4.2%	8.1%	19.0%	8.1%	14.5%	10.2%
Trafford	11.8%	3.0%	6.3%	17.2%	5.1%	11.4%	7.7%
Wigan	17.1%	4.0%	8.9%	19.0%	8.6%	14.7%	10.6%
Greater Manchester	14.3%	3.9%	7.7%	18.3%	6.1%	12.6%	9.5%
North West	14.5%	4.1%	8.1%	19.4%	7.3%	13.4%	9.8%
England	12.5%	3.4%	6.9%	15.8%	5.1%	10.2%	8.1%

Source: Census 2011

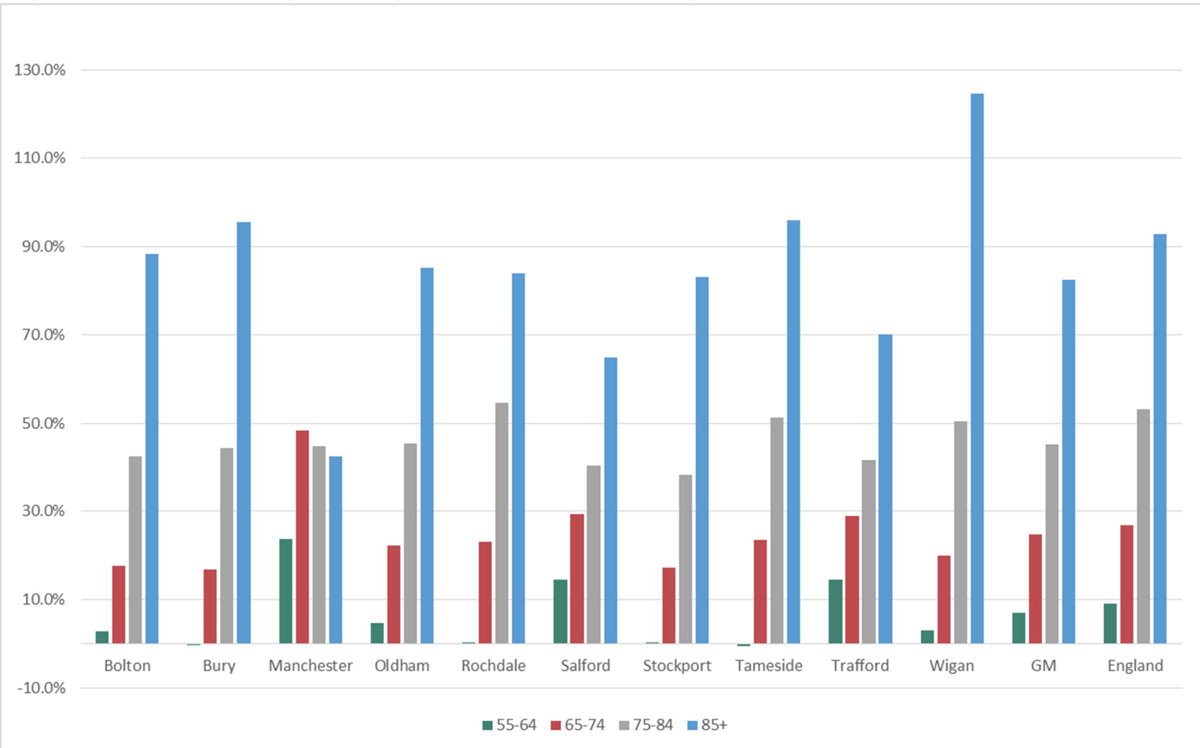
Older people population and household projections

Figure 8.4: Percentage change in population by age band 2016 to 2036



Source: Table 2: 2016-based subnational population projections for local authorities

Figure 8.5: Percentage change in households by age band 2016 to 2036



Source: MHCLG 2016-based household projections

8.3 The Projecting Older People Population Information system (POPPI)[98] uses population data to identify key characteristics within the older population (over 65), projecting numbers into the future to indicate a prevalence of conditions that may require a social care response and prevalence rates to estimate conditions such as limiting long term illness and dementia.)

Table 8.91: Projections of those Living Alone, Living in Care Home and those having difficulty with domestic tasks 2017 to 2035

Area	Percentage of Population Over 65 Living Alone		Percentage of Population Over 65 Living in a Care Home		Percentage of Total population aged 65 and over unable to manage at least one domestic task on their own	
	2035	% Change 2017 to 2035	2035	% Change 2017 to 2035	2035	% Change 2017 to 2035
Bolton	37.0	43.6	2.9	75.4	42.5	49.4
Bury	37.4	44.5	4.5	78.2	43.0	50.4
Manchester	35.8	44.2	3.3	51.5	40.1	46.2
Oldham	37.1	43.4	5.0	73.4	42.6	48.8
Rochdale	37.2	44.5	4.3	71.4	42.6	49.4
Salford	36.1	39.1	3.4	53.7	41.2	42.7
Stockport	37.3	39.4	3.6	70.3	43.4	44.9
Tameside	36.4	46.1	4.0	80.2	41.8	52.0
Trafford	37.1	43.8	3.0	61.3	42.9	47.6
Wigan	36.5	46.5	3.7	87.6	41.8	53.1
Greater Manchester	36.8	43.5	3.7	70.7	42.1	48.4
North West	37.3	41.8	4.1	71.3	43.0	47.2
England	37.4	48.5	3.9	78.1	43.3	53.6

Source: http://www.poppi.org.uk/

[98] POPPI is supported by the Extra Care Charitable Trust, originally developed by the Institute of Public Care (IPC) for the Care Services Efficiency Delivery Programme (CSED). The system is now provided solely by the Institute of Public Care on licence from the Department of Health http://www.poppi.org.uk/

Table 8.92: Projections of those with a limiting long term illness and predicted to have dementia

Area	Total population aged 65 and over with a limiting long term illness whose day-to-day activities are limited a lot			Total population aged 65 and over predicted to have dementia		
	2035	% in 2035	% Change 2017 to 2035	2035	% in 2035	% Change 2017 to 2035
Bolton	20,348	30.2	46.1	5,313	7.9	66.7
Bury	12,534	26.3	47.5	3,807	8.0	67.8
Manchester	26,296	35.4	47.5	5,074	6.8	47.3
Oldham	15,320	29.5	45.5	4,085	7.9	66.6
Rochdale	15,050	30.5	45.5	3,890	7.9	65.2
Salford	16,919	33.4	42.2	3,822	7.6	55.1
Stockport	19,244	24.3	45.7	6,585	8.3	60.6
Tameside	17,104	30.4	49.5	4,307	7.7	70.3
Trafford	14,553	24.9	48.5	4,728	8.1	57.7
Wigan	28,293	32.8	49.3	6,618	7.7	77.2
Greater Manchester	185,661	29.9	46.9	48,229	7.8	63.3
North West	534,247	29.0	44.7	148,775	8.1	63.7
England	3,656,935	25.3	53.7	1,194,419	8.3	70.1

Source: http://www.poppi.org.uk/

Provision of homes for older people

8.4 The following data from the Elderly Accommodation Counsel (EAC) provides information on the provision of specialist housing developments, where there is some form of care or extra security and registered care homes in the UK. The data includes accommodation for rent (mainly by local authorities and housing associations) and includes outright leasehold sale properties and shared ownership properties. The information outlined in the sections below includes data on age exclusive housing, retirement/sheltered housing, enhanced sheltered housing and extra care housing. A brief explanation of these will be provided in each section.

8.5 The table below shows the total number of specialist housing developments for older people across Greater Manchester and also in surrounding areas.

Table 8.93: Total number of specialist housing developments for older people, 2016

Area	Number of Developments	Individual Housing Units
Bolton	174	6,285
Bury	53	1,613
Manchester	192	5,677
Oldham	108	3,049
Rochdale	126	3,573
Salford	85	2,906
Stockport	135	3,549
Tameside	75	2,095
Trafford	91	2,833
Wigan	69	2,194
Greater Manchester	1,108	33,774
Surrounding Areas	**Number of Developments**	**Individual Housing Units**
Cheshire East	221	5,352
Cheshire West and Chester	187	4,722
Warrington	37	1,619
Blackburn with Darwen	65	1,996
Calderdale	55	1,667
Chorley	31	1,007
Rossendale	28	855
West Lancashire	78	2,226
St Helens	65	2,108
High Peak	30	923
Kirklees	91	2,561
Grand Total	1,996	58,810

Source: EAC (2016)

Table 8.94: Major developers of older persons housing in Greater Manchester, 2016

Developer	Number of Properties	Individual Units
Bolton Council	75	3,667
Guinness Northern Counties	85	1,994
Anchor	57	1,914
McCarthy & Stone	39	1,760
Johnnie Johnson Housing Trust	47	1,447
Wigan and Leigh Homes	42	1,257
Oldham Metropolitan Borough Council	29	1,203
Manchester City Council	24	980
Contour Homes	29	789
Family Housing Association (Manchester) Ltd	35	766
Trafford Metropolitan Borough Council	19	716
St Vincent’s Housing Association	24	595
Housing & Care 21	15	579
Irwell Valley Housing Association	17	488
Hanover	16	439
Bury Metropolitan Borough Council	18	437
Tameside Metropolitan Borough Council	16	434
Places for People Homes	24	427
North Cheshire Housing Association	16	402
Your Housing Group - Greater Manchester	12	370

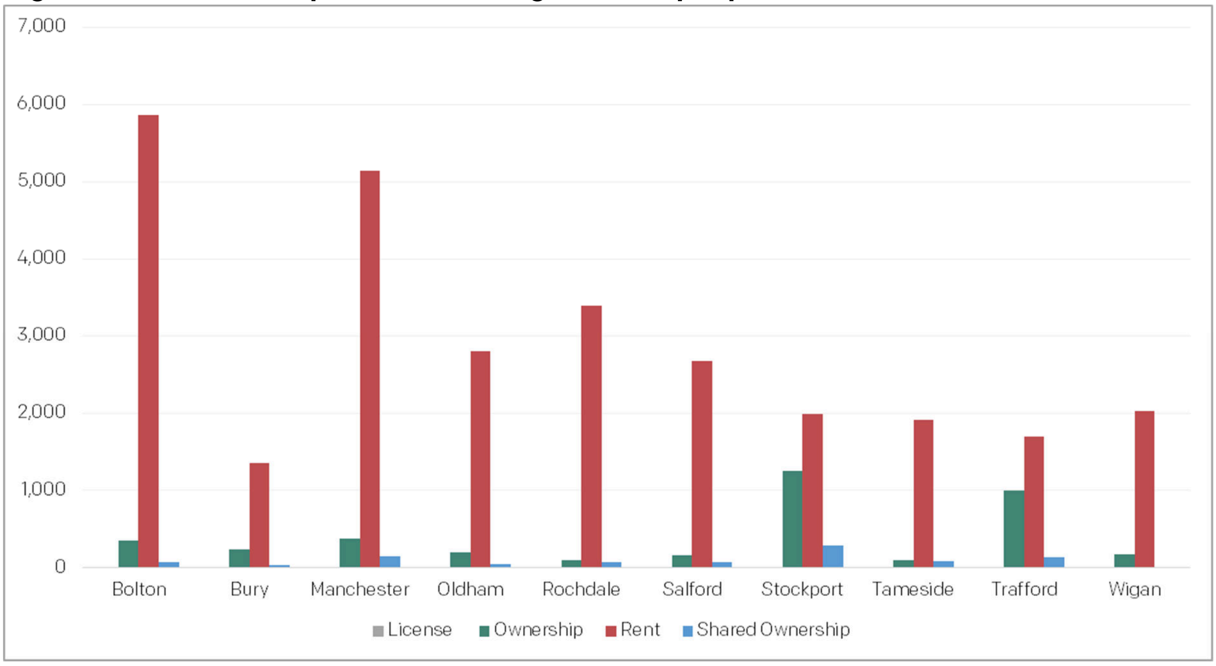
Source: EAC (2016)

Table 8.95: Major managers of older persons housing in Greater Manchester, 2016

Managers	Number of Properties	Individual Units
Bolton at Home	76	3,699
Guinness Northern Counties	103	2,313
Anchor	72	2,278
Housing & Care 21	74	2,267
Rochdale Boroughwide Housing	67	2,047
Contour Homes	70	1,624
Johnnie Johnson Housing Trust Ltd	53	1,566
Wigan and Leigh Homes	42	1,257
FirstPort	31	1,255
Adactus Housing Association	43	1,065
City West Housing Trust	19	950
Trafford Housing Trust	22	885
Places for People Homes	46	839
Northwards Housing	16	837
Great Places Housing Group	41	824
Hanover	26	692
St Vincent's Housing Association Ltd	29	653
New Charter Homes Ltd	23	643
Irwell Valley Housing Association Ltd	20	594
Equity Housing Group	25	585
Six Town Housing	20	505

Source: EAC (2016)

Figure 8.6: Tenure of specialist housing for older people in Greater Manchester, 2016



Source: EAC (2016)

Age exclusive housing: options for older people

8.6 Age Exclusive Housing is housing designed, built and let/sold exclusively to older people (typically 50+ or 55+), but without the supportive on-site management characteristic of sheltered housing. Usually also without any shared facilities except perhaps a garden.

Table 8.96: Total number of age exclusive housing developments for older people

Area	Number of Properties	Housing units
Bolton	47	977
Bury	12	360
Manchester	75	1,399
Oldham	41	1,180
Rochdale	71	1,668
Salford	23	423
Stockport	58	950
Tameside	45	1,145
Trafford	24	343
Wigan	4	150
Greater Manchester	400	8,595
Surrounding Areas	**Number of Properties**	**Housing units**
Blackburn with Darwen	18	381
Calderdale	16	355
Cheshire East	143	2,496
Cheshire West and Chester	34	438
Chorley	10	197
High Peak	6	110
Kirklees	36	813
Rossendale	17	472
St Helens	21	369
Warrington	6	171
West Lancashire	21	439
Grand Total	728	14,836

Source: EAC (2016)

8.7 There are 400 age exclusive housing developments in Greater Manchester containing a total number of 8,595 dwelling units. Manchester and Rochdale have over 70 each and the latter had 1,668 individual housing units. Wigan only had 4 such age exclusive properties with a total of 160 individual dwellings. In the surrounding areas of Greater Manchester, Cheshire East had the highest numbers at 143 developments containing 2,496 units.

Retirement / sheltered housing

8.8 This group of accommodation represents self-contained flats or bungalows reserved for people over the age of 55 or 60 with some shared facilities such as a residents' lounge, garden, guest suite, laundry; plus on-site supportive management. Developments of this type are usually built for either owner-occupation or renting on secure tenancies.

Table 8.97: Total number of sheltered housing developments for older people, 2016

Area	Number of Properties	Sum of Housing units
Bolton	117	4,984
Bury	37	1,051
Manchester	108	3,741
Oldham	63	1,694
Rochdale	54	1,862
Salford	55	2,143
Stockport	67	2,161
Tameside	22	671
Trafford	63	2,290
Wigan	61	1,894
Greater Manchester	647	22,491
Surrounding Areas	**Number of Properties**	**Sum of Housing units**
Blackburn with Darwen	39	1,298
Calderdale	35	1,152
Cheshire East	65	2,225
Cheshire West and Chester	139	3,251
Chorley	20	732
High Peak	23	768
Kirklees	49	1,499
Rossendale	9	317
St Helens	38	1,233
Warrington	24	954
West Lancashire	55	1,626
Grand Total	1,143	37,546

Source: EAC (2016)

8.9 As highlighted above there are 647 sheltered housing properties in Greater Manchester, 117 of which are in Bolton and 108 within the district of Manchester. These districts have the highest number of individual units at 4,984 and 3,741 respectively. In terms of surrounding districts Cheshire West and Chester have the highest number of units (139 containing 3,251 dwellings).

Enhanced sheltered housing

8.10 Enhanced Sheltered housing means that additional services are included to enable older people to retain their independence in their own home for as long as possible. Typically there may be 24/7 (non-registered) staffing cover, at least one daily meal will be provided and there may be additional shared facilities. This type of housing can also be referred to as assisted living or very sheltered housing.

Table 8.98: Total number of enhanced sheltered housing developments for older people, 2016

Area	Number of Properties	Sum of Housing units
Manchester	1	54
Stockport	1	63
Wigan	2	80
Greater Manchester	4	197
Surrounding Areas	**Number of Properties**	**Sum of Housing units**
Cheshire East	6	130
Cheshire West and Chester	3	169
Kirklees	1	6
Rossendale	1	24
St Helens	1	15
Warrington	4	161
West Lancashire	1	50

Source: EAC (2016)

8.11 There are four enhanced sheltered developments in Greater Manchester, containing 197 dwellings and half of these are in Wigan. Cheshire East has six such properties and Warrington 4 with total dwellings in each of these districts of over 160.

Extra care housing

8.12 These housing schemes have a service registered to provide personal or nursing care available on site 24/7. Typically at least one daily meal will be provided and there will be additional shared facilities. Some schemes specialise in dementia care, or may contain a dedicated dementia unit. There are 49 such units in Greater Manchester with 2,125 individual units. In the surrounding areas Cheshire West and Chester had the highest number of such establishments with 11 containing 863 individual units.

Table 8.99: Total number of extra care housing developments for older people, 2016

Area	Number of Properties	Sum of Housing units
Bolton	10	324
Bury	2	109
Manchester	8	483
Oldham*	3	106
Rochdale	1	43
Salford	6	311
Stockport	8	323
Tameside	5	156
Trafford	4	200
Wigan	2	70
Greater Manchester	49	2,125
Surrounding Areas	**Number of Properties**	**Sum of Housing units**
Blackburn with Darwen	7	245
Calderdale	4	160
Cheshire East	6	429
Cheshire West and Chester	11	864
High Peak	1	45
Kirklees	5	243
Rossendale	1	42
St Helens	5	491
Warrington	3	333
West Lancashire	1	111

Source: EAC (2016)

8.13 Recent changes in ECH and Sheltered provision means there are now six schemes supporting 225 units. There are a further two ECH schemes that have had investment to enable ECH to be delivered but these have been deemed as too small for full ECH so have been redesignated as sheltered schemes. Whilst there are no specialist Dementia care ECH there are a number of people being supported in schemes with dementia diagnosis. Models for dementia care are being looked into.

Future needs of older persons housing supply

The Strategic Housing for Older People Analysis Tool (SHOP@)

8.14 The Strategic Housing for Older People Analysis Tool (SHOP@) has been developed by the Housing Learning and Improvement Network (LIN)[99] and EAC (Elderly Accommodation Counsel)[100] to improve decision making when commissioning future housing and care services for older people and reduce development risk. It delivers detailed analysis to inform communities, planners and politicians of the future needs of older people.

Methodology

8.15 SHOP@ uses a series of nationally available datasets to review potential need against current local service supply including ONS census population estimates and projections for people over 75 (2014); the EAC housing and care service database to provide the current housing and care supply; prevalence rates from the DH/MHCLG More Choice Greater Voice report[101] and the Index of Multiple Deprivation (IMD) to estimate the relative deprivation of older people in a locality to indicate the market split between social rent and leasehold housing services.

8.16 Assumptions are based on current business as usual with a positive proactive approach from across all ten authorities. The report has combined the EAC enhanced sheltered and extra care into a single housing with care sector. It has also taken the opportunity to add the age exclusive accommodation to the sheltered sector to offer a housing without care sector

8.17 Since the launch of the SHOP@ free website the market environment and financial constraints have changed significantly. The Housing LIN and EAC have taken the opportunity to review the parameters within SHOP@ to better reflect the market in 2016.The increased financial challenges in both the capital and revenue sectors have reduced developments, especially in

[99] http://www.housinglin.org.uk/
[100] http://www.eac.org.uk/
[101] https://www.housinglin.org.uk/Topics/type/More-Choice-Greater-Voice-a-toolkit-for-producing-a-strategy-for-accommodation-with-care-for-older-people/

the public sector. This report has assumed current business as usual and the impact of Brexit has not been considered at this stage.

8.18 The report assumes a proactive approach to Housing with Care. The SHOP@ analysis tool does not take into account the suitability and viability of current stock to meet future demands. It assumes that any deregistered or stock no longer fit for purpose will be replaced by new quality modern homes.

Prevalence rates

8.19 The proposed prevalence rates per 1,000 people over 75 for this SHOP@ model are based on a proactive older people's housing strategy and policy to help shape future older persons housing in a positive way and are 35 per 1,000 people aged over 75 for Housing with care and 125 per 1,000 people for Sheltered Housing Retirement Housing Age Exclusive.

Tenure of future developments

8.20 It is assumed that any future developments will be greater in the owner-occupier/leasehold sector. This is based on the increased number of older owner-occupiers with large equity in their homes and the continued pressure on public sector finance will shift the percentage of future development, especially for the more affluent authorities.[102]

8.21 The tenure split across the ten authorities in Greater Manchester has been allocated according to the IMD score for the authority. The higher the relative affluence of the authority the greater proportion of leasehold development. The development of retirement housing is likely to be a lower percentage than leasehold Housing with Care as there is a higher starting base of sheltered housing provision across the region compared with the nascent retirement housing market. The only exception to this rule has been for Manchester where it is projected that a greater leasehold percentage will be built due to the regeneration of the city centre making it a more attractive location for higher value leasehold schemes.

[102] See: http://www.housinglin.org.uk/Topics/browse/HousingExtraCare/ExtraCareStrategy/SHOP/SHOPAT/Dashboard/FutureMarketSplit/

Table 8.100: Modelling of Tenure

Area	IMD Decile	Tenure Split			
		% Housing with Care Rental	% Housing with Care Leasehold	% Sheltered Housing	% Retirement Housing
Bolton	2	75	25	80	20
Bury	4	50	50	67	33
Manchester	0	75	25	50	50
Oldham	1	75	25	80	20
Rochdale	0	75	25	80	20
Salford	1	75	25	80	20
Stockport	5	50	50	50	50
Tameside	1	75	25	80	20
Trafford	6	33	67	33	67
Wigan	3	50	50	67	33

Source: SHOP@

Housing with Care

Table 8.101: Housing with care need: shortfalls by 2035

Area	Need for Housing with Care		
	Total	Rent	Lease
Bolton	915	605	310
Bury	656	289	367
Manchester	650	407	243
Oldham	815	621	193
Rochdale	843	621	221
Salford	543	330	214
Stockport	1,091	473	619
Tameside	866	611	256
Trafford	836	193	643
Wigan	1,348	679	669
Greater Manchester	8,561	4,828	3,733

Source: SHOP@

Sheltered and Retirement Housing

Table 8.102: Sheltered and retirement housing: shortfalls by 2035

Area	Sheltered and Retirement Housing	Sheltered and Retirement Housing - Rent	Sheltered and Retirement Housing - Lease
Bolton	-1,536	-1,999	463
Bury	1,638	846	792
Manchester	-903	-2,542	1,640
Oldham	345	-103	448
Rochdale	-368	-819	452
Salford	455	84	371
Stockport	2,112	913	1,200
Tameside	1,711	1,161	550
Trafford	1,043	-344	1,387
Wigan	3,306	1,632	1,675
Greater Manchester	7,803	-1,172	8,975

Source: SHOP@

Projecting Adult Needs and Service Information (PANSI)

8.22 PANSI has been developed by the Institute of Public Care (IPC) for use by local authority planners and commissioners of social care provision in England, together with providers. It 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 have been extracted below to look at the impacts for Greater Manchester relative to the region as a whole and nationally.

Table 8.103: Population aged 18-64 predicted to have a serious physical disability in 2035

Area	% of Total population aged 18-64 in 2035	% Change 2017 to 2035
Bolton	2.3	-1.5
Bury	2.3	-0.9
Manchester	1.8	15.5
Oldham	2.3	0.9
Rochdale	2.3	-3.4
Salford	2.1	13.5
Stockport	2.4	-1.4
Tameside	2.4	-2.8
Trafford	2.4	7.8
Wigan	2.4	-2.4
Greater Manchester	2.2	3.4
North West	2.3	-3.9
England	2.3	4.0

Source: PANSI

Table 8.104: Population aged 18-64 predicted to have a moderate or severe learning disability in 2035

Area	% Total population aged 18-64 2035	% Change 2017 to 2035
Bolton	0.56	0.9
Bury	0.56	1.9
Manchester	0.57	11.2
Oldham	0.56	2.5
Rochdale	0.56	-1.7
Salford	0.57	12.4
Stockport	0.56	1.4
Tameside	0.56	-1.3
Trafford	0.56	7.4
Wigan	0.56	-1.9
Greater Manchester	0.57	4.3
North West	0.15	0.0
England	0.15	5.6

Source: PANSI

Table 8.105: Population aged 18-64 predicted to have a common mental disorder in 2035

Area	% Total population aged 18-64 2035	% Change 2017 to 2035
Bolton	16.02	-1.4
Bury	16.06	-0.8
Manchester	15.88	8.8
Oldham	16.03	0.3
Rochdale	16.04	-3.9
Salford	15.93	10.0
Stockport	16.12	-0.7
Tameside	16.10	-3.2
Trafford	16.07	5.4
Wigan	16.11	-3.2
Greater Manchester	16.01	2.1
North West	16.07	-2.9
England	16.06	3.1

Source: PANSI

Private renters

PRS Household composition

8.23 The PRS houses a range of household types ranging from single young people to families. Understanding where these groups currently live in the PRS helps build a picture of the current PRS offer in Greater Manchester. For example, in Oldham there are a high proportion of renters with dependent children, while in Manchester there is a large group of 'other households' who are students and young professionals living in shared houses.

8.24 Thirty five percent of PRS residents in Greater Manchester live in one person households, followed by 29% residents who are families with dependent children and just over 50% of households are single people or couples.

Table 8.106: PRS Household composition, 2011

Area	All households PRS or living rent free	% One person house-holds	% Couples*	% of Families with dependent Children**	% of Families with non dependent children***	Other Households
Bolton	17,771	38.5	14.6	33.0	3.9	10.0
Bury	11,768	36.8	15.9	34.6	4.4	8.3
Manchester	61,411	31.3	16.3	19.7	2.1	30.7
Oldham	12,174	31.3	14.4	38.6	5.3	10.3
Rochdale	12,816	36.8	14.0	36.5	4.5	8.2
Salford	21,103	36.9	18.6	25.0	2.8	16.6
Stockport	15,056	36.0	16.7	35.1	4.3	8.0
Tameside	13,648	37.4	15.8	34.9	4.8	7.0
Trafford	12,989	31.7	20.1	31.4	3.7	13.1
Wigan	17,693	36.9	16.3	34.8	4.9	7.1
Greater Manchester	196,429	34.6	16.3	29.0	3.5	16.6
North West	501,717	37.8	15.9	29.5	3.9	12.9
England and Wales	4,215,669	33.0	18.4	28.3	3.7	16.6

Source: Census 2011

** includes Over 65; Married with no children; Cohabiting with no children*

*** includes Married, Cohabiting and Lone Parents*

**** includes Married, Cohabiting and Lone Parents*

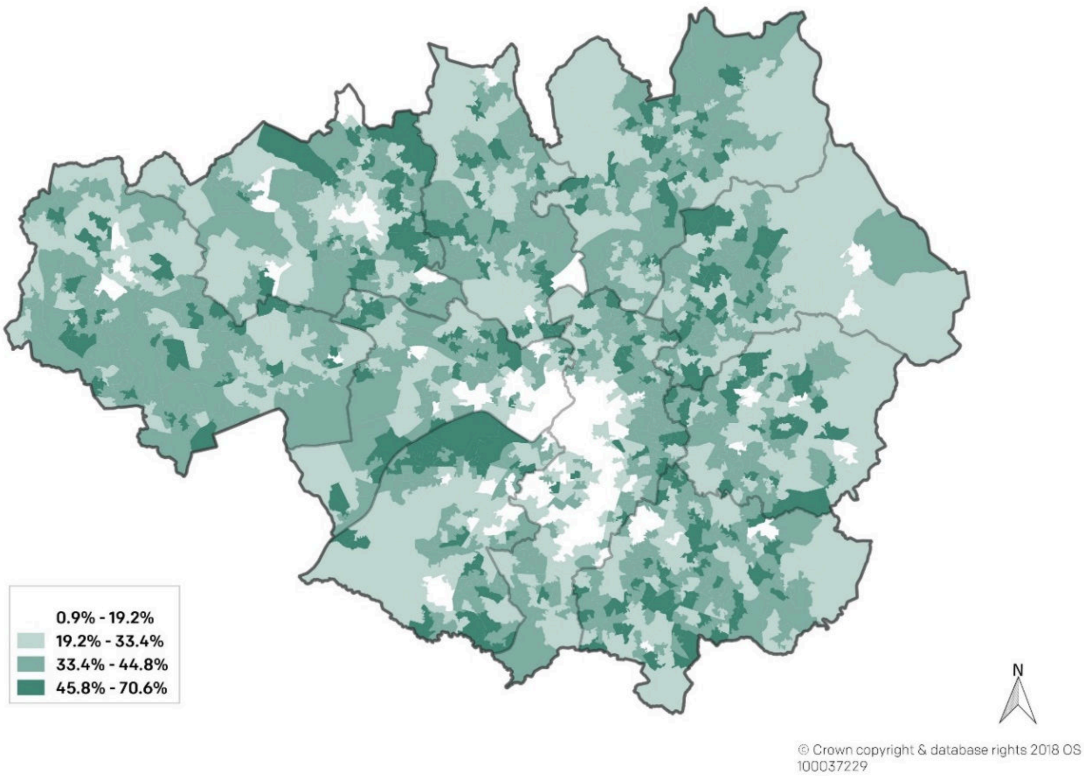
8.25 As the number of families in the private sector grows, consideration should be given to meeting the requirements of families in need of more stable accommodation, particularly once children reach school age. The Communities and Local Government Select Committee observed:

The demographics within the private rented sector are changing. No longer can it be seen as a tenure mainly for those looking for short-term, flexible forms of housing. While some renters still require flexibility, there is also an increasing number, including families with children, looking for longer-term security. (2013:38)

8.26 Between 2001 and 2011 there was an 85% increase in families with dependent children living in the PRS in Greater Manchester, to a total of 57,000 households. The area with the largest increase was Wigan with a 103% increase and the lowest was Oldham with a 58% increase. There has also been a significant increase in couples living in the PRS, the Greater Manchester increase was 98%, ranging from 143% in Salford to 41% in Trafford.

8.27 The spatial breakdown of PRS in 2011 below shows that families with dependent children are found in all districts. However, there are far fewer households with dependent children in Salford and Manchester compared with other districts. In the map below, the areas in dark green are the areas where over 40% of PRS households are those with dependent children.

Map 8.3: Families in Greater Manchester with dependent children as a percentage of all households in PRS, 2011



Source: Census 2011

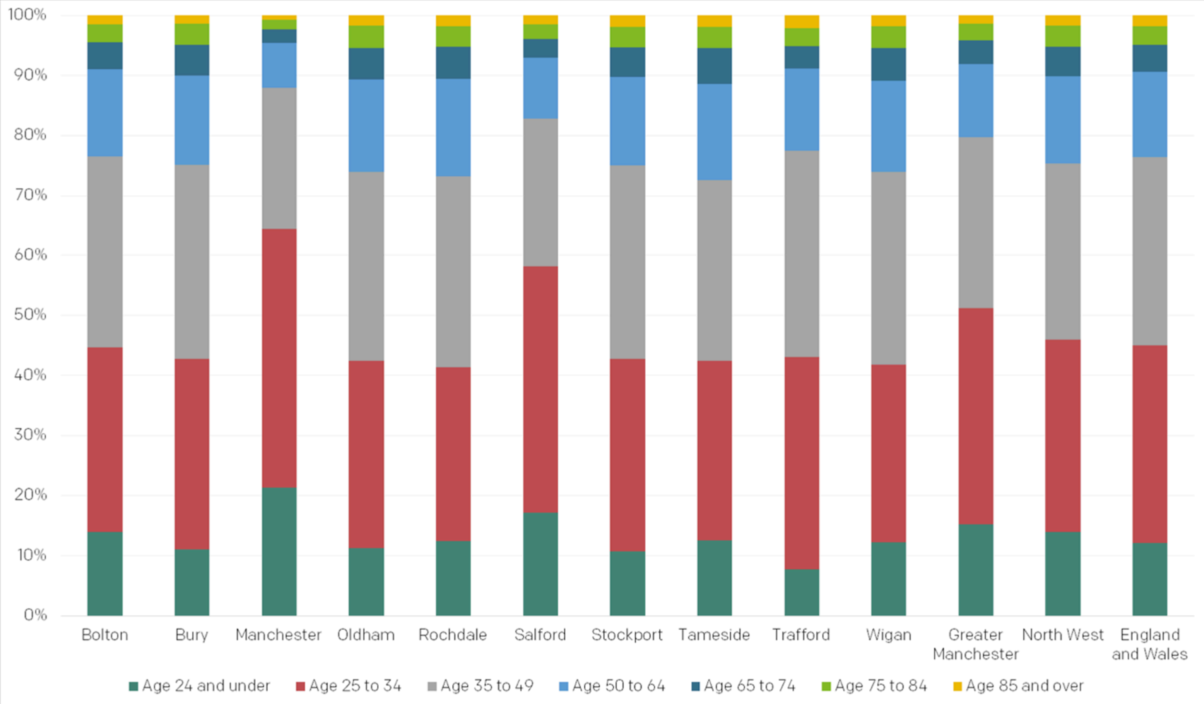
8.28 As well as areas which have significant concentrations of families, there are also clear patterns to where 'other households' live. In Manchester 30% of 'other households' rent in the PRS, these include a significant number of students who live in a small number of locations. The number of couples in Trafford (20.1%) is significantly higher than other areas and the number of one person households in Bolton (38.5%) is also significantly high.

Age and the PRS in Greater Manchester

8.29 The PRS is largely dominated by younger people with the majority of renters aged under 35. Furthermore, as more people struggle to access the housing market through owner-occupation and social housing the overall age of people living in the PRS is expected to increase and in turn the types of households in the sector will also change. Shelter and other commentators have noted the increase in families living in the sector, many of whom started in the sector as young professionals and are unable to make the move from the PRS to owner-occupation.

8.30 The PRS houses 60% of those under 24 in Greater Manchester and just under 40% of those aged 25 - 34. The areas with the least 25 - 34 year olds in the sector are Oldham, Rochdale and Wigan, whilst Manchester, Salford and Trafford have the largest number of this age group living in the sector. Below sets out the percentage of each age group who live in the PRS by each Greater Manchester district and Greater Manchester baseline.

Figure 8.7: Age of household reference person living in PRS, 2011



Source: Census 2011

8.31 The pattern above is reflected when analysing the breakdown of the people who live in the PRS, the majority of those who live in the sector are under 35 with a large population under 24 in Salford and Manchester which reflects the large student populations in these areas.

PRS Renters

8.32 Using employee income data from 2014 ASHE (Annual Survey of Household Earnings) and occupation from 2011 census, New Economy modelling defined six PRS renter groups.

Table 8.107: PRS renter types and definitions

Private renter sector	Definition
Lifestyle renter (34,000 households)	Those who have an income which allows them choose to rent or buy. These renters have choice in where they rent and what they rent. The following two occupation groups make up 'Lifestyle renters', the median 2015 NW incomes for these groups are below: • Managers, directors and senior officials (£33,843) • Professional occupations (£32,998)
Constrained renter (52,000 households)	Those who may have been traditionally home owners but are constrained in accessing home ownership due to the housing market, in terms of overall house purchase cost or deposit. They may also be constrained by age and are not in a position at which they would buy a home. Many parts of this group are those who would be considered part of 'Generation rent'. The following four occupation groups make up 'Constrained renters', the median NW incomes for these groups are below: • Associate professional and technical occupations (£28,370) • Skilled trades occupations (£22,951) • Process, plant and machine operatives (£21,376) • Administrative and secretarial occupations (£17,743)
Low pay renter (41,000 households)	Those working households who are on a low income. It is likely that these households will be in receipt of some Housing Benefit to support in paying their housing costs. They are likely to be long term renters and the PRS will be their primary housing option. These households may seek to access social housing and are similar to those in work living in social housing. The following three occupation groups make up 'Low pay renter', the median NW incomes for these groups are below:

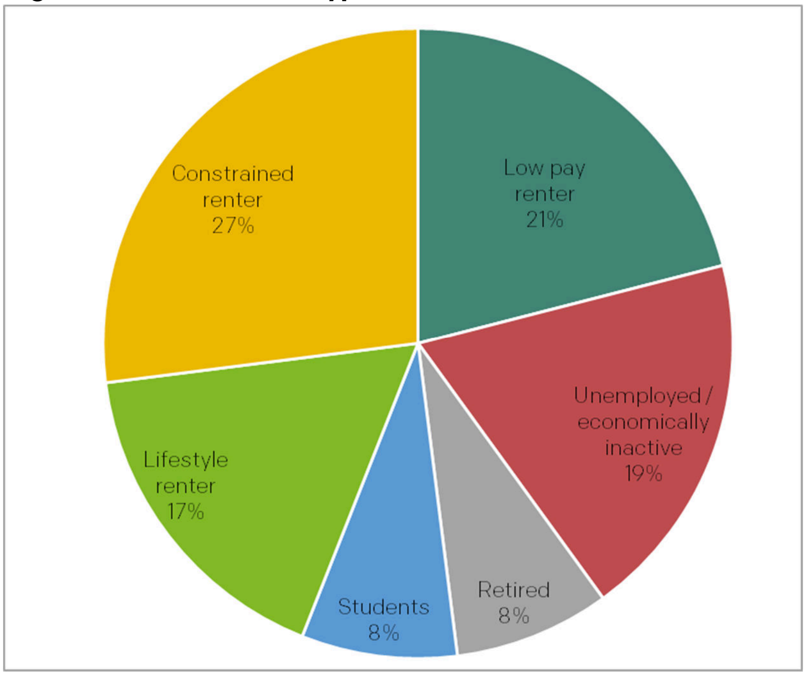
Private renter sector	Definition
	• Caring, leisure and other service occupations (£12,991) • Elementary occupations (£12,189) • Sales and customer service occupations (£11,856)
Unemployed/ economically inactive (38,000 households)	Those households who are unemployed, long term sick or caring for family. These households are likely to be in receipt of Housing Benefit and are likely to be long term renters in the PRS. The following groups from the census make up the groups: • Long term sick or disabled • Unemployed • Looking after home or family
Retired (16,000 households)	This is a small group of retired people in the PRS. They are a combination of longer term PRS renters and those in specialist Older Persons' rented accommodation.
Students (16,000 households)	There are around 100,000 HE students at Greater Manchester institutions,[103] a large proportion of which live in the PRS. As such, there is a section of the PRS which primarily meets their needs. They are found clustered in predominantly traditional student areas.

Source: ASHE Income Data, Census 2011, New Economy Modelling

8.33 The below provides an initial breakdown of the 196,000 PRS and living rent free households in Greater Manchester from the 2011 census based on the above definitions.

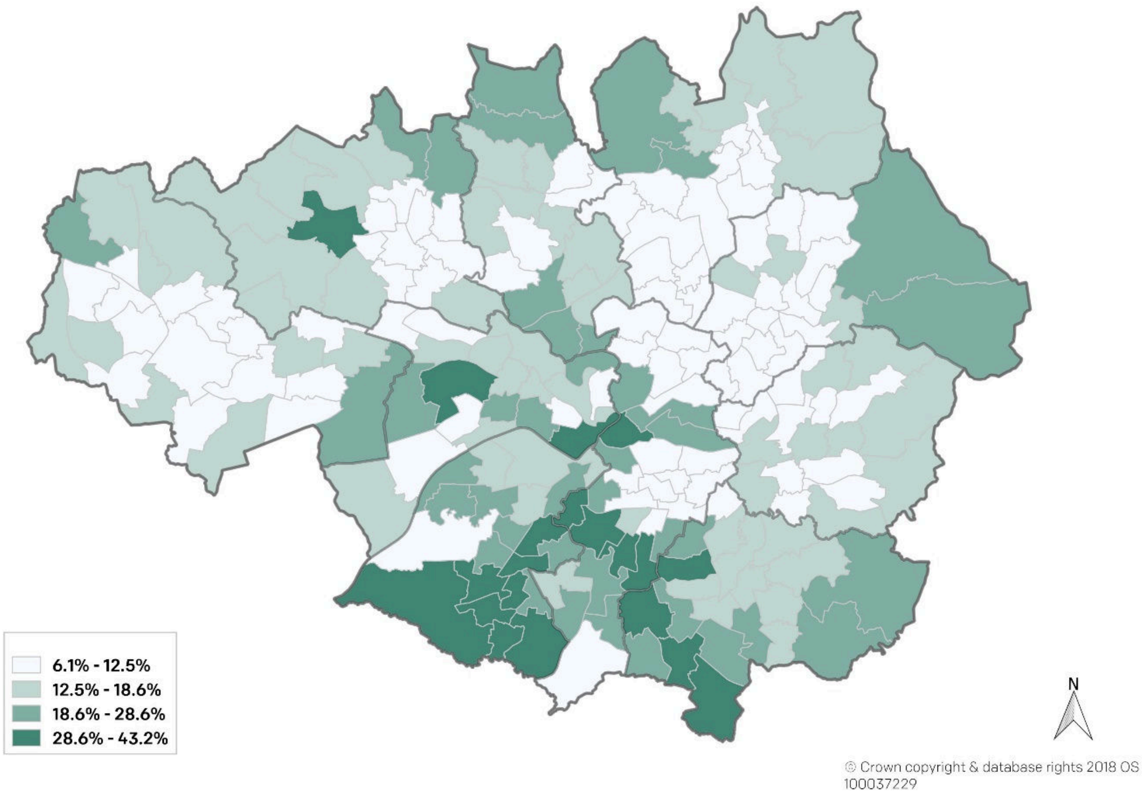
[103] Higher Education Statistics Agency, 2015/16 Students by HE provider, level, mode and domicile

Figure 8.8: PRS renter types in Greater Manchester, 2011



Source: Census 2011 (NB. Occupations rebased removing students proportionally)

Map 8.4: Lifestyle renters as a proportion of PRS renters by ward



Source: ASHE Table 3.7a Annual pay - Gross (£) - For all employee jobs: United Kingdom, 2015, Census 2011, New Economy Modelling

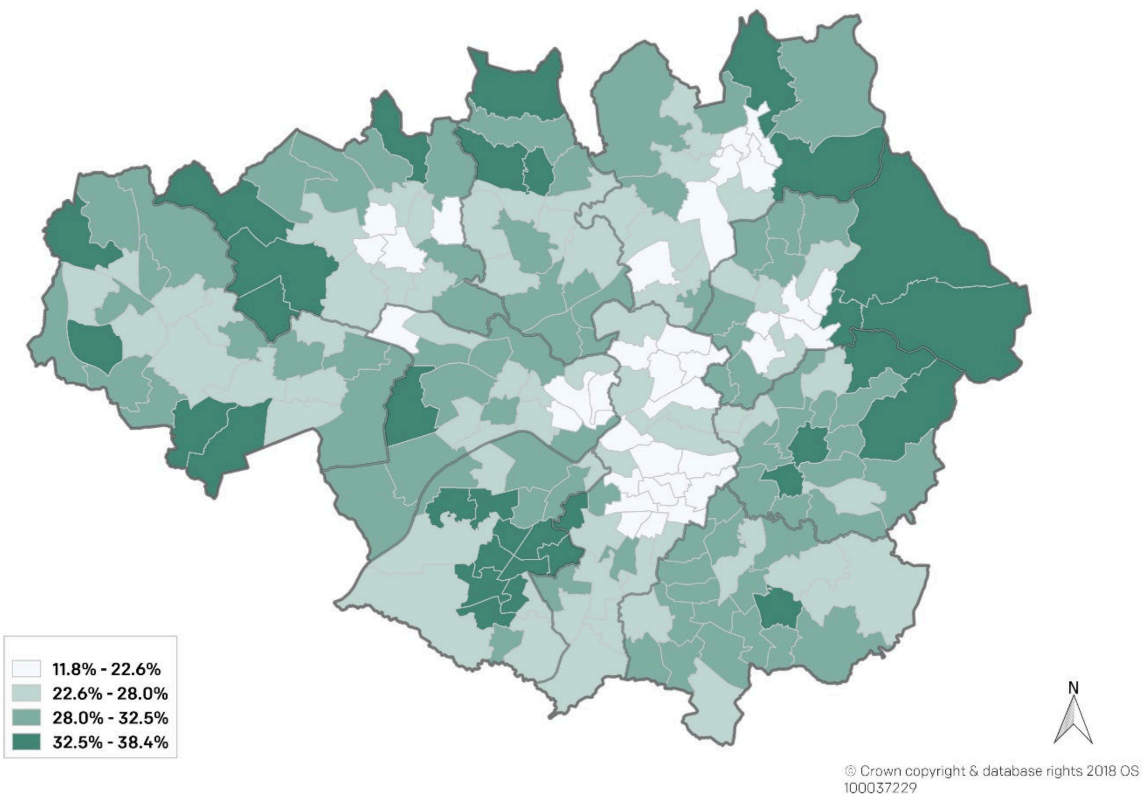
8.34 Lifestyle Renters are found in all districts of Greater Manchester, however in some districts there are more areas of concentrated Lifestyle renting.

8.35 In Trafford the southern wards of Bowdon, Hale Central, Hale Barns and Altrincham all see Lifestyle Renters making up over 30% of PRS tenants. Over 40% of all PRS renters in South Manchester the wards of Chorlton, Chorlton Park, Didsbury West and Didsbury East are Lifestyle Renters; areas such as Bramhall in Stockport also see high levels of Lifestyle Renting.

8.36 The northern districts also contain pockets of lifestyle renters, in the Worsley and Boothstown wards of Salford, Heaton and Lostock in Bolton, North Manor and Ramsbottom in Bury, Norden and Bamford in Rochdale and Saddleworth in Oldham.

8.37 Wigan and Tameside are the only districts with no particular concentrations of Lifestyle Renters.

Map 8.5: Constrained renters as a proportion of PRS renters by ward



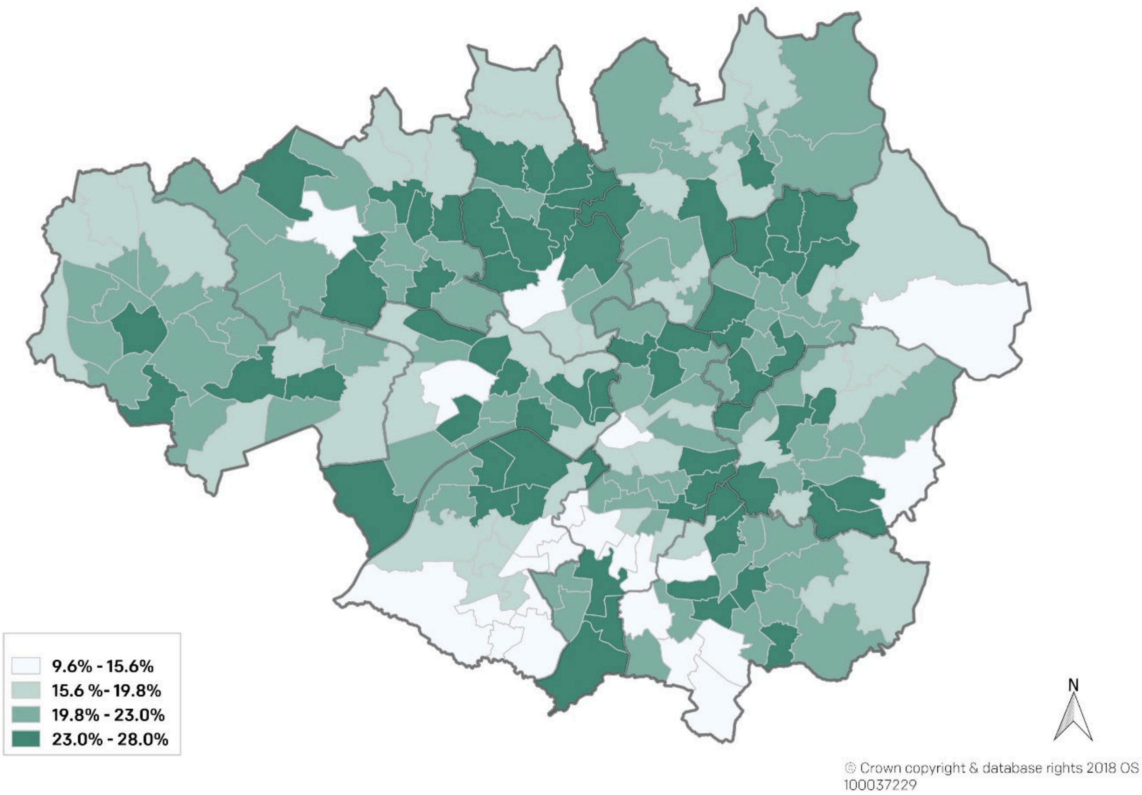
Source: ASHE Table 3.7a Annual pay - Gross (£) - For all employee jobs: United Kingdom, 2015, Census 2011, New Economy Modelling

8.38 There are varied levels of Constrained Renters across the conurbation, but all districts contain wards where Constrained Renters account for 30% or more of the PRS population, highlighting the prevalence of this group.

8.39 Denton North East in Tameside, Saddleworth in Oldham, Ramsbottom in Bury, Bromley Cross in Bolton and Winstanley in Wigan are among the wards with the highest proportion of Constrained Renters, showing that this group are spread across the conurbation. There are also a number of wards in southern Trafford which contain high concentrations of Constrained Renters.

8.40 Conversely, Manchester contains relatively few wards with a high proportion of Constrained Renters, with three where less than 10% are constrained renters. This is largely due to the high student populations in those wards.

Map 8.6: Low pay renters as a proportion of PRS renters by ward



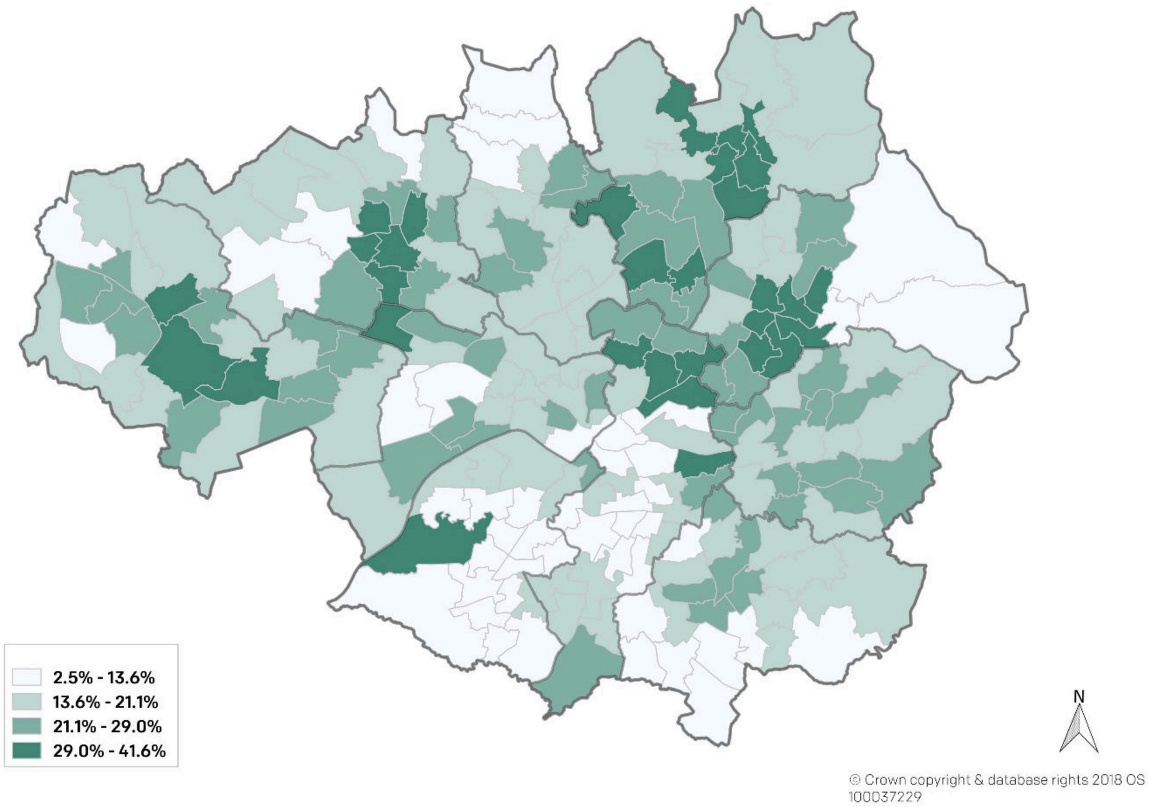
Source: ASHE Table 3.7a Annual pay - Gross (£) - For all employee jobs: United Kingdom, 2015, Census 2011, New Economy Modelling

8.41 Low pay renters are relatively evenly spread across the conurbation and make up a large proportion of PRS renters; there are 144 wards where Low Pay Renters account for more than 30% of PRS tenants. Only Tameside and Wigan do not contain any wards where Low Pay renters make up over 40% of PRS tenants.

8.42 There are particular concentrations in Gorse Hill in Trafford, Castleton in Rochdale, Woodhouse Park in Manchester, Radcliffe North and West in Bury, Reddish North and South and Manor in Stockport and Shaw in Oldham. Low Pay renters make up at least 30% of PRS renters in all of the principal town centres (other than Rochdale and Manchester).

8.43 As might be expected, the areas with lower concentrations of this group correlate with those with higher concentrations of Lifestyle Renters.

Map 8.7: Economically Inactive/Unemployed Renters as a proportion of PRS renters by ward



Source: ASHE Table 3.7a Annual pay - Gross (£) - For all employee jobs: United Kingdom, 2015, Census 2011, New Economy Modelling

8.44 Levels of Economically inactive/Unemployed Renters vary across the conurbation, but with 98 wards where more than 20% of PRS tenants are in this group, the group account for a relatively large proportion of PRS tenants.

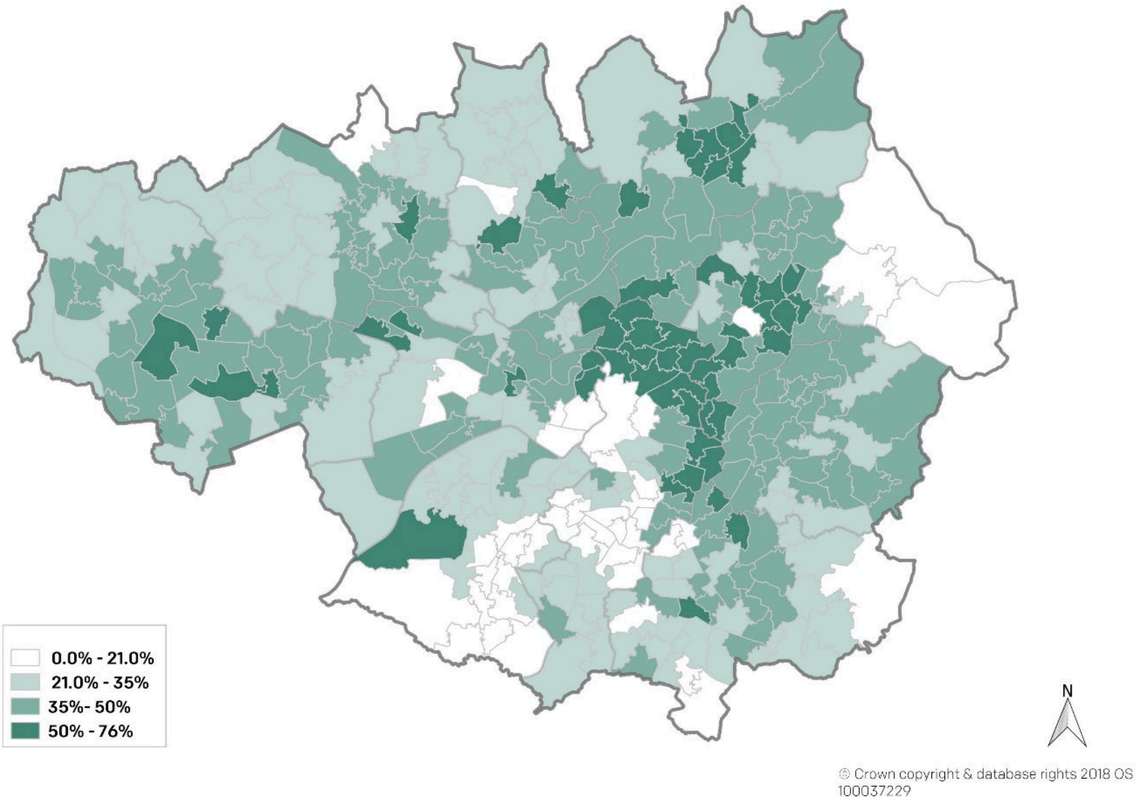
8.45 There are high concentrations of this group in Milkstone and Deeplish in Rochdale, as well as in a number of wards around the town centres of Bolton and Oldham. There are also concentrations in Harpurhey, Moston and Miles Platting/Newton Heath in Manchester, Ince, Leigh and Abram in Wigan, Bucklow- St Martins in Trafford and Little Hulton in Salford.

8.46 Manchester City Centre is the only ward where less than 5% of PRS renters are Economically Inactive/Unemployed.

8.47 For both unemployed and low pay PRS claimants further analysis has been undertaken to understand which areas have concentrations of PRS households in receipt of HB.

Housing Benefit

Map 8.8: Housing Benefit claimants in the PRS, March 2011

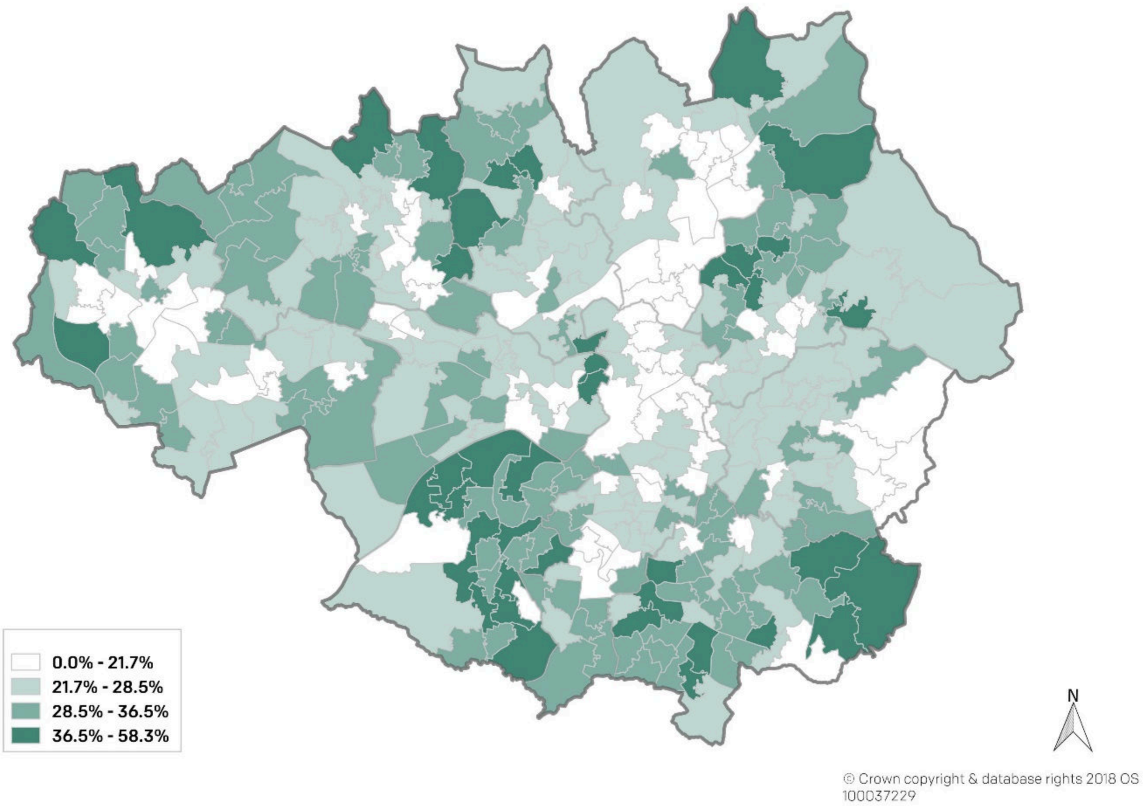


Source: DWP StatXplore, Housing Benefit Caseload

8.48 Using data from Department for Work and Pensions (DWP) tool Stat X-Plore, it is possible to map the Housing Benefit (HB) claimants in the PRS sector and which of those claimants are in working households. 2011 data has been mapped as this is in line with other census data used for this analysis.

8.49 The map shows that areas with large numbers of PRS residents do not necessarily have high levels of HB claimants; for example the regional centre generally shows fewer than 200 HB claimants in PRS. Furthermore, areas with large numbers of students have lower levels of PRS HB claimants due to students being ineligible for HB. Areas with relatively high numbers of PRS residents as well as PRS HB claimants include much of north Manchester, the Gorton and Levenshulme areas and the Broughton area of Salford. As well as these areas, Leigh and areas around the town centres of Bolton, Bury, Rochdale and Ashton-under-Lyne have relatively high levels of PRS HB claimants.

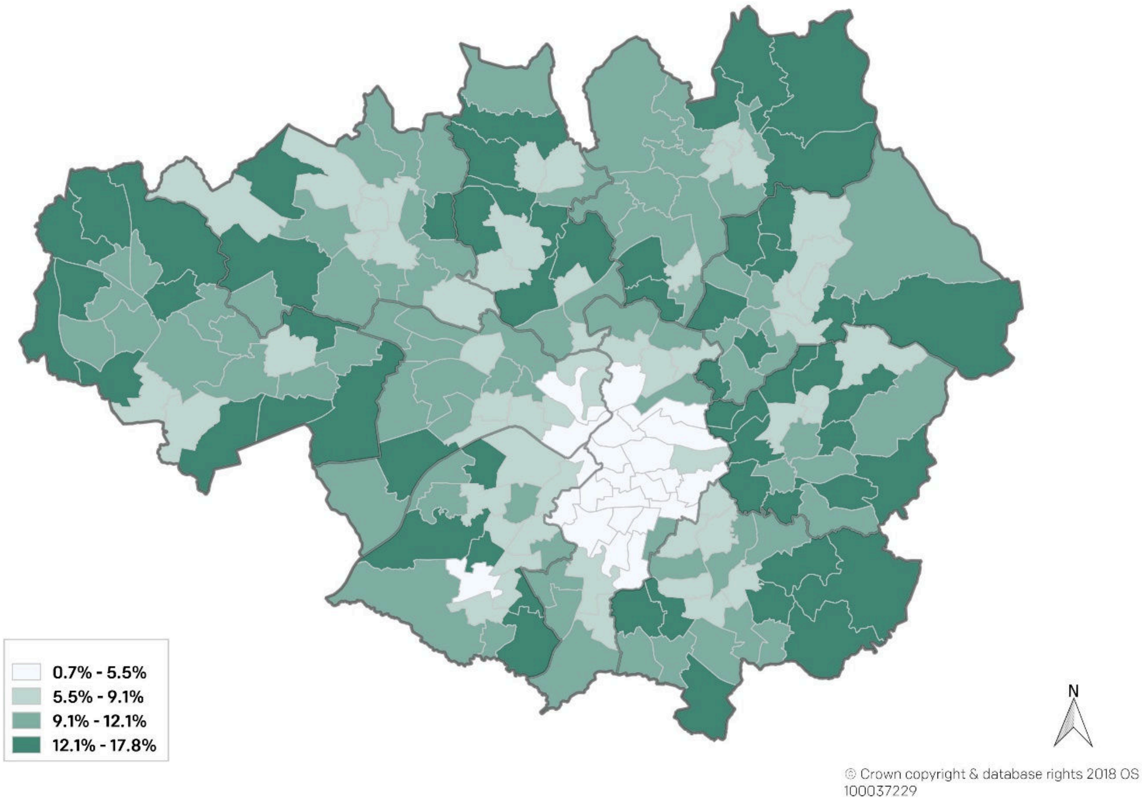
Map 8.9: Proportion of PRS HB claimants that are working, March 2011



Source: DWP StatXplore, Housing Benefit Caseload

8.50 The above map shows that the areas with high levels of PRS HB claimants do not necessarily have high proportions of claimants that are in employment. In areas such as Hale Barns, although there are not a large number of PRS HB claimants, more than 50% of those who are claiming are in employment. This is also the case in Higher Woodhill and Brooklands in Bury. Some areas of Stockport, such as the areas surrounding Marple and Cheadle and Cheadle Hulme also have high proportions but low numbers of working HB claimants, along with Ainsworth in Bury and Harwood Lee in Bolton and Sale, Timperley and Altrincham in Trafford.

Map 8.10: Retired renters as a proportion of PRS renters by ward



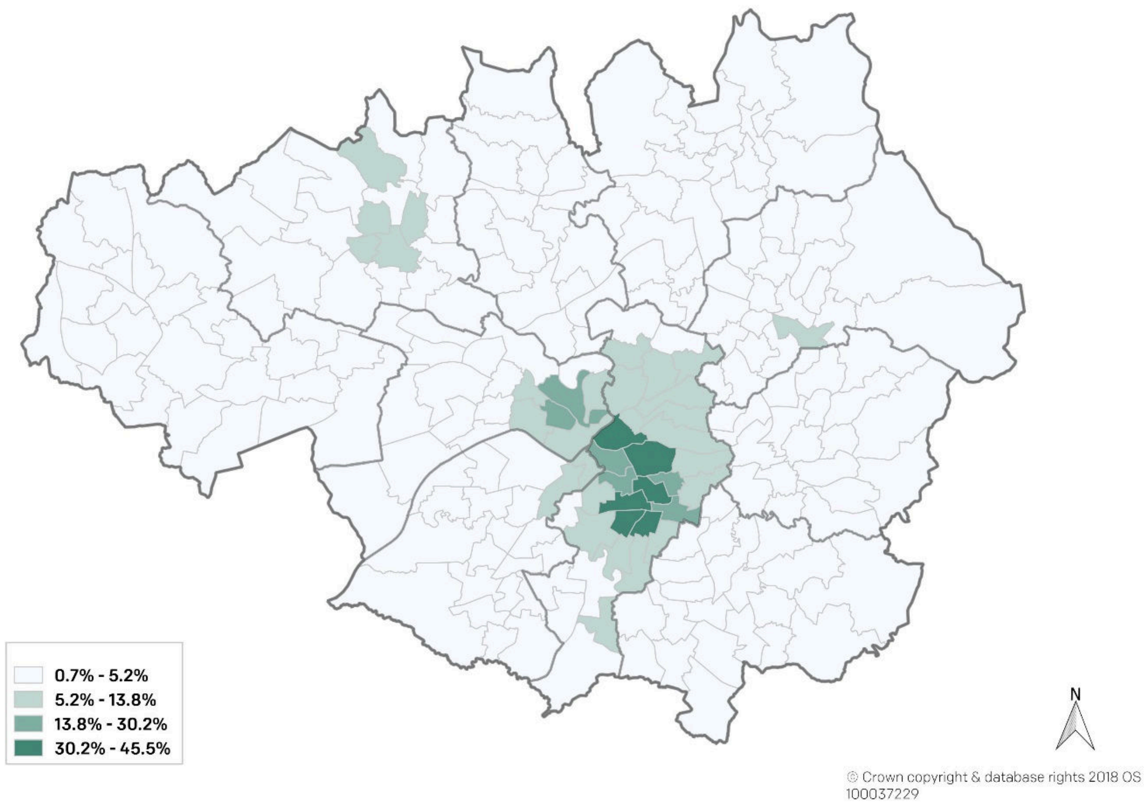
Source: ASHE Table 3.7a Annual pay - Gross (£) - For all employee jobs: United Kingdom, 2015, Census 2011, New Economy Modelling

8.51 Retired renters make up a relatively small proportion of the PRS, with no wards where more than 20% of tenants are in that group. Manchester has very low levels of Retired Renters, largely due to the age profile of the district, which is younger than the others in Greater Manchester.

8.52 Wards with higher levels of Retired Renters include Royton in Oldham, South Middleton and wards on the periphery of the conurbation such as

Bramhall South, Standish with Langtree in Wigan and Longdendale in Tameside. Some of these wards, may have relatively high numbers of specialist Older Persons rented accommodation which may explain this trend, however more detailed analysis is required to understand it. The numbers of older people living in the PRS is very small.

Map 8.11: Students as a proportion of PRS renters by ward



Source: ASHE Table 3.7a Annual pay - Gross (£) - For all employee jobs: United Kingdom, 2015, Census 2011, New Economy Modelling

8.53 Students in the PRS tend to live in very concentrated areas of the conurbation, close to the universities and make up a very small proportion of renters elsewhere. In the Manchester wards of City Centre, Ardwick, Moss Side, Rusholme, Fallowfield, Withington and Old Moat, students make up 30-50% of PRS tenants. In Hulme, Longsight and Levenshulme this is 20%-30%.

8.54 There are also concentrations of students in Irwell Riverside in Salford and to a lesser extent in Ordsall, Langworthy and Broughton. Bolton wards Great Lever, Rumworth, Halliwell and Tonge with the Haulgh all also display lesser concentrations of students, as they are close to the University of Bolton. In Alexandra ward in Oldham 5-10% of PRS tenants are students.

Family housing

Table 8.108: Number of dwellings with dependent children 2015 and 2035 by Greater Manchester district

Area	Number of dependent children	Number of dwellings with dependent children 2015	Number of dwellings with dependent children 2035	Change in number of dwellings with dependent children 2015 to 2035	% Change in number of dwellings with dependent children 2015 to 2035
Bolton	1	17,559	20,103	2,544	14.5
	2	12,861	12,074	-787	-6.1
	3 or more	6,646	7,140	494	7.4
	All	**37,066**	**39,317**	**2,251**	**6.1**
Bury	1	11,419	12,863	1,444	12.6
	2	8,663	8,551	-112	-1.3
	3 or more	4,090	4,420	330	8.1
	All	**24,172**	**25,834**	**1,662**	**6.9**
Manchester	1	28,760	35,220	6,460	22.5
	2	19,233	20,047	814	4.2
	3 or more	13,204	15,180	1,976	15.0
	All	**61,197**	**70,447**	**9,250**	**15.1**
Oldham	1	13,895	13,765	-130	-0.9
	2	9,975	8,618	-1,357	-13.6
	3 or more	6,849	7,914	1,065	15.5
	All	**30,719**	**30,297**	**-422**	**-1.4**
Rochdale	1	13,303	14,274	971	7.3
	2	9,086	7,900	-1,186	-13.1
	3 or more	5,489	5,675	186	3.4
	All	**27,878**	**27,849**	**-29**	**-0.1**
Salford	1	15,580	21,363	5,783	37.1
	2	9,794	10,699	905	9.2
	3 or more	5,047	5,233	186	3.7
	All	**30,421**	**37,295**	**6,874**	**22.6**
Stockport	1	17,645	21,884	4,239	24.0
	2	13,827	14,780	953	6.9
	3 or more	5,158	4,947	-211	-4.1
	All	**36,630**	**41,611**	**4,981**	**13.6**
Tameside	1	14,956	17,422	2,466	16.5
	2	9,858	9,406	-452	-4.6
	3 or more	4,358	4,292	-66	-1.5
	All	**29,172**	**31,120**	**1,948**	**6.7**
Trafford	1	14,434	18,229	3,795	26.3
	2	12,136	13,387	1,251	10.3
	3 or more	5,002	5,037	35	0.7
	All	**31,572**	**36,653**	**5,081**	**16.1**
Wigan	1	21,602	24,651	3,049	14.1
	2	14,735	13,872	-863	-5.9
	3 or more	5,159	4,846	-313	-6.1
	All	**41,496**	**43,369**	**1,873**	**4.5**

Source: MHCLG Household Projections 2014

8.4 Glossary of terms

AHP	Affordable Homes Programme
ALMO	Arm's-Length Management Organisation
ASHE	Annual Survey of Household Earnings
BME	Black and Minority Ethnic
CCHPR	Cambridge Centre of Housing and Planning Research
CORE	Continuous recording of lettings and sales in social housing in England
CTB	Council tax database
DCLG	Department for Communities and Local Government (Now Ministry of Housing, Communities and Local Government)
DWP	Department for Work and Pensions
EAC	Elderly Accommodation Counsel
ECH	Extra care housing
EHS	English Housing Survey
EPC	Energy Performance Certificate
FTB	First time buyer
GM	Greater Manchester
GMC	Greater Manchester Council
GMCA	Greater Manchester Combined Authority
GMFM	Greater Manchester Forecasting Model
GMSF	Greater Manchester Spatial Framework
GTAA	Gypsy and Traveller and Travelling Showperson Accommodation Assessment
HB	Housing Benefit
HCA	Homes and Communities Agency (now Homes England)
HE	Homes England (formerly Homes and Communities Agency (HCA))
HEI	Higher education institutions
HESA	Higher Education Statistics Agency
HMA	Housing market areas
Housing LIN	Housing Learning and Improvement Network
HPSSA	House Price Statistics for Small Areas
HRP	Household reference person
IMD	Index of multiple deprivation
IPHRP	Index of Private Housing Rental Prices
LA	Local authorities
LHA	Local Housing Allowance
LHN	Local Housing Need

LIN	Learning and Improvement Network
LSOA	Lower Super Output Area
LTHPD	Long-term health problem or disability
MCC	Manchester City Council
MHCLG	Ministry of Housing, Communities and Local Government (formerly DCLG)
NPPF	National Planning Policy Framework
NW	North West
OAN	Objectively assessed housing need
ONS	Office for National Statistics
PANSI	Projecting Adult Needs and Service Information
PBSA	Purpose Built Student Accommodation
PPG	Planning practice guidance
PPTS	Planning policy for traveller sites
PRS	Private rented sector
RP	Registered Providers
RTB	Right to Buy
SFA	Service Family Accommodation
SHMA	Strategic Housing Market Assessment
SHOP@	Strategic Housing for Older People Analysis Tool
SNPP	Subnational population projections
SLA	Single Living Accommodation
TTWA	Travel to work areas
UC	Universal Credit
VOA	Valuation Office Agency

8.5 List of figures

8.6 List of tables

8.7 List of maps