

Warrington Local Housing Needs Assessment Update – Sub-Area Profiles

Warrington Borough Council

August 2021

Prepared by

GL Hearn

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DATE
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Limitations

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1. EXECUTIVE SUMMARY

- 1.1 This document has been written to support the findings set out in the Warrington Local Housing Needs Assessment (2021) as regards the size mix of new homes brought forward in future years within each of the sub-areas in Warrington.

The Town Centre

- 1.2 The Housing Market Model concludes there is evidence for the housing mix in the Town Centre to vary from the Borough-level findings. This is particularly the case for Affordable Home Ownership units where the variation is in the order of 15%. For market homes the variation falls to 7% and for affordable rented tenures 9%.
- 1.3 Town Centre has seen its population growth in recent years. This indicates the area has a growing economy and well-functioning housing market.
- 1.4 Significant variations from the Borough average have been revealed in data relating to the demand and supply metrics. This points to a substantially different housing market in the Town Centre compared with the Borough as a whole.
- 1.5 Demand trends are driven by demographic profile that indicates clear contrasts with the Borough average. For example, over the period 2011-19, there has been a significant increase in the 16-24, 25-34 and 35-54 age cohorts in the Town Centre whereas in the Borough as a whole these cohorts have reduced in number.
- 1.6 The Town Centre has not seen the degree of ageing within the population as has been the case for the Borough as a whole.
- 1.7 The land supply pipeline in the Borough constitutes a large minority of total supply in the Borough. While it constitutes only 12% of sites, these are forecast to generate around 42% of all new homes over the Plan period.

- 1.8 The principle role of the Town Centre within the wider Borough housing market is a place where households on modest means are able to access low cost market homes either for rent or for purchase.
- 1.9 That said, higher average property values suggests it is a place where higher earning people live to take advantage of this more urban environment and access higher paid employment. This is an important “vote of confidence” in the appeal of the Town Centre to a socio-economic group with a choice of where to live.
- 1.10 The evidence suggests that the market has been able to respond to the surge in demand for homes in the Town centre reasonably effectively. However, completions data over the period 2010-20 indicates a clear bias towards smaller dwellings and flats.
- 1.11 There is evidence of a misalignment between supply and demand in the Town Centre housing market. For example, the prevalence of higher over-crowding and vacancy rates compared with the Borough average.
- 1.12 While the need for smaller homes is beyond doubt (this is supported both by demographic evidence and economic modelling) the recent emphasis on the delivery of smaller homes may have created a shortage of larger dwellings.
- 1.13 It is important to note the internal linkages within housing markets. Increasing the supply of larger dwellings is likely to ease pressure on mid-sized homes, making them more affordable and helping to resolve overcrowding issues faced by households on modest incomes.
- 1.14 The strength of the rental market and the importance that the PRS performs in providing housing in the Borough suggests planning policy should make specific provision for build to rent (BTR).

East Warrington

- 1.15 The Housing Market Model concludes there is evidence to support a higher proportion of 3 bedroom market and affordable home ownership dwellings in East Warrington compared with the Borough-level findings. Also, a greater proportion of 1 bedroom affordable rented units.
- 1.16 The principle role of East Warrington within the wider Borough housing market is to provide larger family homes to young families. Indeed, the lower average and median house prices compared to Warrington as a whole will encourage family households to move to the sub-area.
- 1.17 For this reason, there is a need for high-quality family-sized homes (3 bedroom) that are affordable so as to address demand from family households.
- 1.18 On the basis of the evidence gathered, there is no requirement for policy to depart from the size mix recommendations put forward by the Housing Market Model.

North West Warrington

- 1.19 The Housing Market Model concludes there is evidence to support a higher proportion of 3 and 4+ bedroom affordable home ownership and affordable rented dwellings in North East Warrington compared with the Borough-level findings.
- 1.20 The principle role of North West Warrington within the wider Borough housing market is to provide homes for older households and larger homes to growing families.
- 1.21 Given this profile, there is a need for high-quality affordable family-sized homes (3 and 4-bedroom). There is also an argument for increasing the number of smaller dwellings. These may be attractive to newly forming households given the relatively low house prices in the sub-area. Smaller homes may also facilitate "right-sizing" for older residents given the high relative proportion of homes that are "under-occupied".

- 1.22 There is also a significant number of vacant units; rather than suggesting an over-supply of homes this is likely to point to misalignments between supply and demand (i.e., an over-supply of homes of a certain size).
- 1.23 Despite this, the sub-area has seen relatively little development in recent years.
- 1.24 On the basis of the evidence gathered, there is no requirement for policy to depart from the size mix recommendations put forward by the Housing Market Model.

North East Warrington

- 1.25 The Housing Market Model concludes there is evidence to support a higher proportion of 4+ bedroom homes in North East Warrington compared with the Borough-level findings.
- 1.26 The sub-area has substantially higher average, median and lower quartile house prices as compared to Warrington. This is accompanied by higher median income.
- 1.27 The median affordability ratio is significantly higher at 8.29 compared with a Borough average of 5.89.
- 1.28 There is evidence of substantial under-occupation of homes. Around 54% of Households have 2 or more spare rooms. This is greater than the Borough average by around 14%.
- 1.29 On the basis of the evidence gathered, it is worth noting the misalignment between supply and demand in sizes of home. It would therefore be advisable for a higher number of smaller units to be provided to facilitate “right-sizing” on the part of older households.
- 1.30 This would be likely to release larger dwellings onto the market suited to family households. In so doing, this may stabilise house-prices and improve affordability.

- 1.31 It is notable that the market has delivered a high proportion of dwellings of 4+ bedrooms in recent years (around 50% of all new homes over the past 10 years). It will therefore require active policy to bring future delivery more in line with the mix put forward in the Housing Market Model (this recommends future supply should include 20% of dwellings of this size).
- 1.32 There is no requirement for policy to depart from the size mix recommendations put forward by the Housing Market Model, indeed guiding development towards a size mix that is closer to these recommendations will help address some of the misalignments that have been detected.

South Warrington

- 1.33 The Housing Market Model concludes there is evidence to support a higher proportion of 4+ bedroom market and affordable home ownership dwellings in South Warrington compared with the Borough-level findings. Also, a greater proportion of 1 bedroom affordable rented units.
- 1.34 It is arguable that the main role of this sub-area within the wider Borough housing market is to provide larger family homes and premium properties to professional households and empty-nesters.
- 1.35 South Warrington is one of the most affluent parts of the Borough. Median incomes are around 22% higher than the Borough average.
- 1.36 House prices across all price points are also higher. This results in a Median Affordability Ratio that is 31% higher than that of the Borough (7.73 v 5.89). This means that households with an income around the median will not be able to afford a home in the sub-area.

- 1.37 As with other more affluent parts of the Borough, South Warrington experiences greater under-occupation of homes than Warrington as a whole.
- 1.38 On the basis of the evidence gathered, it is worth noting the misalignment between supply and demand in sizes of home. It would therefore be advisable for a higher number of smaller units to be provided to facilitate “right-sizing” on the part of older households.
- 1.39 This would be likely to release larger dwellings onto the market suited to family households. In so doing, this may stabilise house-prices and improve affordability.
- 1.40 It is notable that the market has delivered a high proportion of dwellings of 4+ bedrooms in recent years (around 54% of all homes). It will therefore require active policy to bring future delivery more in line with mix put forward in the Housing Market Model (this recommends future supply should include 19% of dwellings of this size).
- 1.41 There is no requirement for policy to depart from the size mix recommendations put forward by the Housing Market Model, indeed guiding development towards a size mix that is closer to these recommendations will help address some of the misalignments that have been detected.

West Warrington

- 1.42 The Housing Market Model concludes there is evidence to support a slightly higher proportion of 3 and 4+ bedroom market, affordable home ownership and affordable rented dwellings in West Warrington compared with the Borough-level findings.
- 1.43 In general, the demographic profile of West Warrington is close to that of the Borough average. That said, the sub-area has experienced the faster growth in population compared with the Borough as a whole.

- 1.44 Also, in 2011, West Warrington had a higher proportion of married couples and households with children than the Borough average. Since then the area has seen a greater increase in people of parental age (aged 35-54) than Warrington as a whole.
- 1.45 Given the relative affordability of median house prices, it is arguable that main role of West Warrington in the wider Borough housing market is to provide larger family homes to young families across all price-points.
- 1.46 On the basis of the evidence gathered, there is no requirement for policy to depart from the size mix recommendations put forward by the Housing Market Model.

Inner Warrington

- 1.47 The Housing Market Model concludes there is evidence to support a reduced proportion of 4+ bedroom market and a higher proportion of 1 and 2 bedroom affordable home ownership units in Inner Warrington compared with the Borough as a whole.
- 1.48 It is worth noting that Inner Warrington has experienced the faster growth in population compared with the Borough average and represents around a quarter of the Borough's total population.
- 1.49 Inner Warrington has seen an increase in the 25-34 age group over the period 2011-19 that exceeds growth in this age group within Warrington as a whole by around 80%.
- 1.50 Inner Warrington has house prices that are substantially lower than the Borough average across all price-points with dwellings in the median and lower quartile price range around 57% and 34% less expensive than the Borough average.

- 1.51 As a result, the median affordability ratio is less than the Borough figure by 31% (4.49 v 5.89).
- 1.52 On the basis of the evidence gathered, there is no requirement for policy to depart from the size mix recommendations put forward by the Housing Market Model.

APPENDIX A: Sub-Area Analysis

1.53 A profile of the housing market dynamics within each of the sub-areas has been prepared looking at the following indicators:

- Demand:
 - Population size;
 - Population change 2011 - 19
 - Age structure;
 - Age structure 2019
 - Age structure change 2011-19
 - Older persons population, 2019
 - Household composition
 - Household composition 2011
 - Prevalence of disability within the population
 - Households and People with a Long-Term Health Problem or Disability, 2011 – sub-areas
- Supply:
 - The character of the current housing stock
 - Type of dwellings, 2011
 - Dwellings by size, 2011
 - Distribution of tenures, 2011
 - Completions 2010-20
 - Completions by size 2010-20
 - Distribution of allocated sites in the Town Centre and total capacity (mapped)
 - Balance of brownfield and greenfield sites
- Market signals:
 - Median, average and lower quartile house prices;
 - Median, average and lower quartile rents;
 - Median and LQ income;
 - Median and LQ affordability ratios
 - Over-crowding and under-occupation;
 - Vacancy; and
 - the position of the sub-area within the indices of multiple deprivation.

1.54 The purpose of this exercise is to identify misalignments between the demand for dwellings and supply in any given sub-area, for example through concentration of

any particular tenure or type of dwelling and whether this type is likely to be suited to the demand profile in the area.

1.55 Questions to answer:

- What is the "purpose" of each area within the wider housing market area and how can policy support these trends (assuming they are positive)?
- Is there evidence of a misalignment between supply and demand for homes in each of the sub-areas?
- Is there a strong case for intervention to establish mixed and balanced communities?

APPENDIX B: The Town Centre

Housing market model

- 1.56 The tables to follow present the modelled size requirements for the Town Centre based on the Housing Market Model set out in Part 1 of this report.
- 1.57 This suggests minor adjustments in the required size of market dwellings with a slightly greater emphasis on smaller dwellings compared with larger homes.

Table 1: **Modelled size requirement by sub-area – market housing**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Town Centre	8%	33%	49%	10%
Borough-wide	4%	30%	52%	14%
Variation	4%	3%	-3%	-4%

Source: Housing Market Model

- 1.58 As regards affordable home ownership dwellings, the variation is more pronounced. The Housing Market Model suggests that 14% more new homes should be 1 and 2 bedroom and 15% fewer homes should be 3 and 4-bedrooms in the Town Centre than in the borough as a whole.

Table 2: **Modelled size requirement by sub-area – affordable home ownership**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Town Centre	28%	47%	18%	6%
Borough-wide	18%	43%	31%	8%
Variation	10%	4%	-13%	-2%

Source: Housing Market Model

- 1.59 The Housing Market Model produces a smaller variation for the Town Centre and Borough in respect of affordable rented units.
- 1.60 Here, the balance is 10% more dwellings of 1 and 2 bedrooms and 9% fewer large homes of 3 and 4 bedrooms.

Table 3: Modelled size requirement by sub-area – social/affordable rented homes

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Town Centre	46%	30%	22%	2%
Borough-wide	39%	27%	30%	3%
Variation	7%	3%	-8%	-1%

Source: Housing Market Model

Wider evidence

- 1.61 The Housing Market Model provides a starting point for considering whether variations to the Borough recommendations as regards housing mix are appropriate within each of the sub-areas.
- 1.62 As noted in part 1, the Housing Market Model is not a perfect tool to understand demand for different types and sizes of home in that it bakes in market imbalances in the 2011 Census data.
- 1.63 This section of the report, therefore, gathers data relating to demand and supply of homes together with market signals that indicate whether furthered adjustment may be justified to the Borough-level recommendations in order to improve households' ability to access homes suited to their needs.

Demand

Population size

- 1.64 It is notable that the population of the Town Centre has increased substantially over the period 2011-19. This supports the conclusion that the Town Centre has a growing economy and viable housing market.

Table 4: Population change 2011 – 19

Area	2011	2019	Change	% change
Town Centre	2,428	3,018	590	24.3%
Warrington	202,709	210,014	7,305	3.6%
Proportion	1.2%	1.4%		

Source: ONS Population Estimates

Age structure

- 1.65 The variation in the age structure in the Town Centre with an emphasis on younger people and fewer children points to fewer families and more singles and childless couples.
- 1.66 The change in the age structure since 2011 has seen a divergence in the demographic profile of the Town Centre compared with the Borough average. The former has not seen the degree of ageing within the population as has been the case for the Borough as a whole.
- 1.67 Indeed, over the period, there has been a significant increase in the 16-24, 25-34 and 35-54 age cohorts in the Town Centre whereas in the Borough as a whole these cohorts have reduced in number.

Table 5: Age structure 2019

Area	0-15	16-24	25-34	35-54	55-64	65-74	75-89	90+
Town Centre	12.3%	14.3%	25.4%	29.3%	8.8%	5.6%	3.9%	0.4%
Warrington	18.9%	9.3%	12.5%	27.6%	12.9%	10.3%	7.8%	0.8%
Variation	-6.6%	5.0%	12.9%	1.7%	-4.1%	-4.7%	-3.9%	-0.4%

Source: ONS Population Estimates

Table 6: Age structure change 2011-19

Area	0-15	16-24	25-34	35-54	55-64	65-74	75-89	90+
Town Centre	14.9%	19.3%	28.1%	29.6%	25.0%	28.2%	15.5%	9.1%
Warrington	2.3%	-11.2%	5.9%	-3.9%	11.7%	18.4%	28.8%	32.7%
Variation	12.6%	30.6%	22.2%	33.5%	13.3%	9.9%	-13.3%	-23.6%

Source: ONS Population Estimates

Table 7: Older persons population, 2019

Area	Under 65	65-74	75-84	85+	Total	Total 65+	Total 75+
Town Centre	90.1%	5.6%	3.2%	1.2%	100.0%	9.9%	4.3%
Warrington	81.1%	10.3%	6.4%	2.2%	100.0%	18.9%	8.6%
Variation	10.0%	-83.9%	-100.0%	-83.3%	0.0%	-90.9%	-100.0%

Source: ONS Population Estimates

Household composition

- 1.68 In 2011, the profile of households in the Town Centre shows marked contrasts with the Borough as a whole.

Table 8: Household composition 2011

Area	Married couple	Cohabiting couple	Lone parent	Other households	All other households	Total	Total with dependent children
Town Centre	7.6%	3.6%	3.3%	2.0%	83.5%	100.0%	16.5%
Warrington	17.4%	4.4%	7.3%	1.7%	69.1%	100.0%	30.9%
Variation	-9.8%	-0.8%	-4.0%	0.3%	14.4%	0.0%	-14.4%

Source: Census 2011

Prevalence of disability within the population

- 1.69 In line with the greater prevalence of older people within the Borough population than for the Town Centre, there is a lower proportion of households with disabilities in the latter area compared with the former.

Table 9: Households and People with a Long-Term Health Problem or Disability, 2011 – sub-areas

Area	Households Containing Someone with a Health Problem No.	Households Containing Someone with a Health Problem %	Population with a Health Problem No.	Population with a Health Problem %
Town Centre	362	29.5%	452	18.7%
Warrington	26,940	31.6%	34,997	17.3%
Variation		-2.1%		1.4%

Source: Census 2011

Supply

The character of the current housing stock

- 1.70 The profile of the housing stock in the town centre shows a substantial variation with that of the borough with a much higher proportion of detached and semi-detached homes in the Borough as a whole than for the Town Centre. In the latter area, flats and terraced homes predominate.

Table 10: Type of dwellings, 2011

Area	Detached	Semi-detached	Terraced	Flat	Caravan or other	All Types
Town Centre	3.4%	12.7%	32.2%	51.1%	0.0%	100.0%
Warrington	24.0%	41.3%	23.9%	10.8%	0.1%	100.0%
Variation	-20.6%	-28.6%	8.3%	40.3%	-0.1%	0.0%

Source: Census 2011

- 1.71 This is reflected in the difference in the balance of different sizes of home, with a greater emphasis on those of smaller size.

Table 11: **Dwellings by size (habitable rooms), 2011**

Area	1 room	2 rooms	3 rooms	4 rooms	5 rooms	6 rooms	7 rooms	8+ rooms
Town Centre	1.5%	10.0%	32.2%	18.8%	17.7%	11.7%	4.2%	3.8%
Warrington	0.2%	1.5%	8.8%	14.6%	26.9%	21.9%	11.4%	14.7%
Variation	1.3%	8.5%	23.4%	4.2%	-9.2%	-10.2%	-7.2%	-10.9%

Source: Census 2011

- 1.72 In the 2011 Census, the Borough and the Town Centre present sharp contrasts in terms of the variation in owned and privately rented homes. In the former, the PRS constitutes the dominant tenure, accounting for 42.5% of all homes. This compares with owner occupation where 72.2% of homes are owned and 11.3% are rented.

Table 12: **Distribution of tenures, 2011**

Area	Owned	Shared Ownership	Social Rented	Private Rented
Town Centre	35.70%	0.50%	21.20%	42.50%
Warrington	72.20%	0.80%	15.80%	11.30%
Variation	-36.50%	-0.30%	5.40%	31.20%

Source: Census 2011

- 1.73 The table below compares the numbers of completions in the Town Centre and what proportion of all new homes this accounts for. Over the period, the Town Centre accounted for 4.8% all new homes. This has facilitated a sharp uplift in the numbers of households in the Town Centre by around 24% over the period.
- 1.74 This suggests the level of development that has been achieved over this period is strong by historic standards and indicates a degree of confidence in the industry in bringing forward new homes in this area.

Table 13: Completions 2010-20

Area	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	19/20	Total
Town centre	1	35	16	30	16	31	0	51	35	58	273
Warrington	545	620	664	713	704	615	396	377	536	559	5,729
Proportion of total	0.2%	5.6%	2.4%	4.2%	2.3%	5.0%	0.0%	13.5%	6.5%	10.4%	4.8%

Source: Warrington Borough Council

- 1.75 The table below sets out the balance of sizes of home that have been brought forward over the past ten years in the Town Centre. This clearly points to a bias towards smaller dwellings and flats in the area.

Table 14: Completions by size 2010-20

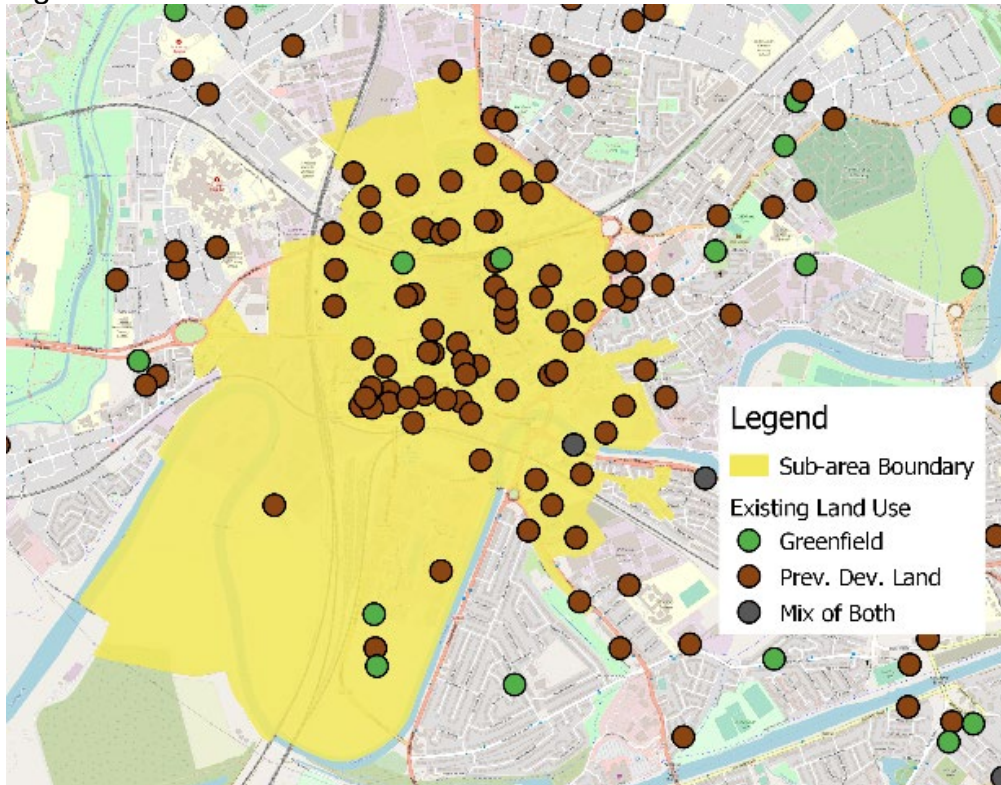
Year	1bed Apt	2 bed Apt	3 bed Apt	4 bed Apt	1 bed House	2 bed House	3 bed House	4 bed House
2010/11							1	
2011/12	20	14	1					
2012/13	10	6						
2013/14	13	2				4	10	1
2014/15	16							
2015/16	19	2			6	3		1
2016/17								
2017/18	19	24	2			6		
2018/19	33						1	1
2019/20								
Grand Total	130	48	3		6	13	12	3
% of Warrington	34%	4%	30%	0%	13%	2%	1%	0%

Source: Warrington Borough Council

- 1.76 The map below indicates the heavy reliance on brownfield sites in the Town Centre. These findings should be read in conjunction with findings from the market survey

that suggest developers are hesitant about bringing forward development on previously developed land due to concerns about viability.

Figure 1: **Distribution of allocated sites - Town Centre**



Source: GLH Analysis of WBC Data

1.77 As noted in the Table below, brownfield sites account for 99.8% of all allocated sites in the Town Centre.

Table 15: **Balance of brownfield and greenfield sites (# of dwellings)**

Area	GF	GF/PDL	PDL	Grand Total
Town Centre	0.2%	0.0%	99.8%	100.0%
Grand Total	22.2%	2.3%	75.5%	100.0%

Source: GLH Analysis of WBC Data

1.78 Also, as set out below, the sites in the Town Centre account for a large proportion of allocated net capacity in the Borough (42%) despite representing only 12% of all sites in terms of number. This indicates the aspiration for high density development

in the Town Centre and the heavy reliance by the Borough on sites in the area to meet its housing targets.

Table 16: **Sites and Net Capacity (# of dwellings)**

Row Labels	# of Sites	Sum of Net Capacity
Town Centre	82	4,569
Warrington	683	10,847
Town centre as a proportion of all capacity	12.00%	42.10%

Source: GLH Analysis of WBC Data

- 1.79 House price data indicates that the Town Centre is an area of wide variations in price. Dwellings priced in the lower quartile are relatively affordable. This indicates the Town Centre is a suitable area in which low cost market homes may be brought forward.
- 1.80 That said, the variation in the average price between the Town Centre and the Borough indicates the presence of dwellings of much higher value at the upper end of the price scale. This suggests the Town Centre is attractive to higher earners.

Market signals

Table 17: **Median, average and lower quartile house prices**

	Median	Average	Lower Quartile
Town Centre	£195,000	£392,786	£111,250
Warrington	£195,000	£282,106	£131,850
Variation	-39.5%	-27.6%	-44.4%

Source: Land Registry Price Paid (2020)

- 1.81 That said, the median income is substantially lower than that of the Borough average indicating the Town Centre is an area to which households on lower incomes gravitate. This can be explained by a desire to be closer to a rich source of employment, proximity to infrastructure and goods and services and the availability of affordable homes.

Table 18: **Median income**

Area	Median income	As a % of the Borough average
Town Centre	£29,200	88.2%
Warrington	£33,100	

Source: ONS (2020)

Table 19: **Median affordability ratios**

Area	Median House Price	Median Income	Affordability Ratio
Town Centre	£195,000	£29,200	6.68
Warrington	£195,000	£33,100	5.89

Source: ONS (2020)

- 1.82 At the time of the 2011 Census, around 7.4% of all households in Warrington were judged to be overcrowded, compared with a Borough average of 3.4%. This points to a misalignment between supply and demand. I.e., a significant minority of households in the Town Centre are unable to afford homes suited to their needs.
- 1.83 By increasing the supply of larger dwellings, this would create the opportunity for wealthier households to upgrade to a larger home, easing the pressure on mid-size homes. If achieved at some scale, this increase in supply would exert a downward pressure on house prices improving affordability and the access of households on modest incomes to homes better suited to their needs.

Table 20: **Over-crowding and under-occupation**

Area	+2 or more	1	0	-1	-2 or less
Town Centre	16.50%	31.80%	44.40%	6.40%	1.00%
Warrington	39.90%	35.20%	22.50%	2.10%	0.30%
Variation	-23.50%	-3.40%	22.00%	4.20%	0.70%

Source: Census 2011

- 1.84 A further indication of misalignments between the supply and demand for homes is the presence of substantial number of vacant units. The proportion of units that are vacant in the Town Centre exceeds that of the Borough average by 7.7%. This

indicates that some re-development should be permissible (for example, the amalgamation of two units into one to create a larger dwelling) to allow the market to re-align the housing stock to address misalignment issues.

- 1.85 It will be worth examining the profile of vacant homes as this will provide an indication of how the market is failing to respond to demand.

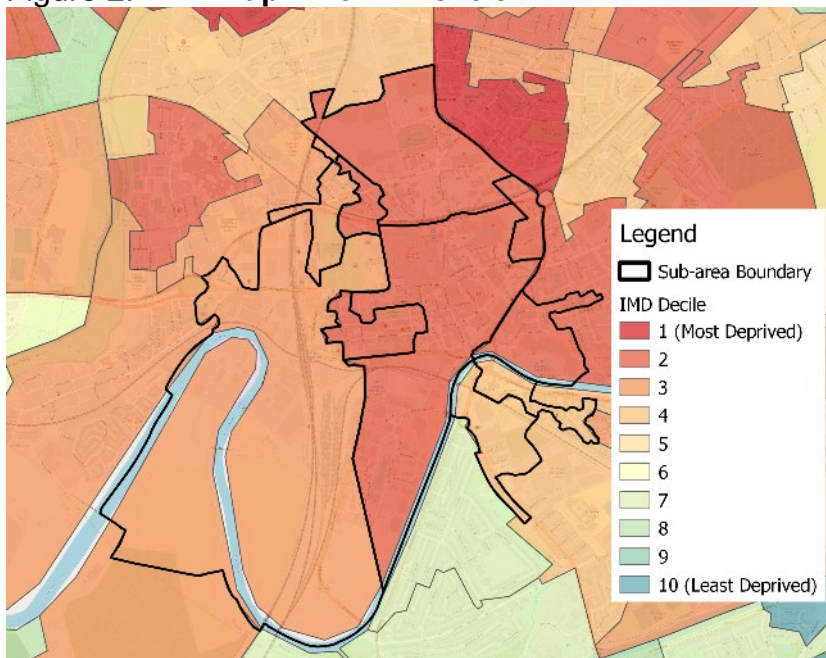
Table 21: **Vacancy**

Area	All household spaces	No usual residents	%
Town Centre	1,377	150	10.90%
Warrington	87,962	2,822	3.20%
Variation			-7.70%

Source: Census 2011

- 1.86 The map below sets out where the Town Centre sits in terms of the metrics that constitute the Index of Multiple Derivation (IMD). The Town Centre is in an area of relative deprivation.

Figure 2: **IMD Map – Town Centre**



Source: Indices of Multiple Deprivation, GLH

Conclusions – the Town Centre

- The Housing Market Model concludes there is evidence for the housing mix in the Town Centre to vary from the Borough-level findings. This is particularly the case for Affordable Home Ownership units where the variation is in the order of 15%.
- For market homes the variation falls to 7% and for affordable rented tenures 9%.
- Town Centre has seen its population growth in recent years. This indicates the area has a growing economy and well-functioning housing market.
- Significant variations from the Borough average have been revealed in data relating to the demand and supply metrics This points to a substantially different housing market in the Town Centre compared with the Borough as a whole.
- The land supply pipeline in the Borough constitutes a large minority of total supply in the Borough. While it constitutes only 12% of sites, these are forecast to generate around 42% of all new homes over the Plan period.
- The purpose of the Town Centre within the wider Borough housing market is a place where households on modest means are able to access low cost market homes either for rent or for purchase.
- The higher average property values suggests it is place where higher earning people live to take advantage of this more urban environment and access higher paid employment. This is an important “vote of confidence” in the appeal of the Town Centre to a socio-economic group with a choice of where to live.
- Demand trends are driven by demographic profile that indicates clear contrasts with the Borough average. For example, over the period 2011-19, there has been a significant increase in the 16-24, 25-34 and 35-54 age cohorts in the Town Centre whereas in the Borough as a whole these cohorts have reduced in number.
- The Town Centre has not seen the degree of ageing within the population as has been the case for the Borough as a whole.
- The evidence suggests that the market has been able to respond to the surge in demand for homes in the Town centre reasonably effectively. Completions data over the period 2010-20 indicates a clear bias towards smaller dwellings and flats in the area.
- That said, there is evidence of a misalignment between supply and demand in the Town Centre housing market. For example, the prevalence of higher overcrowding and vacancy rates compared with the Borough average.

- While the need for smaller homes is beyond doubt (this is supported both by demographic evidence and economic modelling) recent smaller homes may have created a shortage of larger dwellings.
- It is important to note the internal linkages within housing markets. Increasing the supply of larger dwellings is likely to ease pressure on mid-sized homes, making them more affordable and helping to resolve overcrowding issues faced by households on modest incomes.
- The strength of the rental market and the importance that the PRS performs in providing housing in the Borough suggests planning policy should make specific provision for BTR.

APPENDIX C: East Warrington

Housing market model

- 1.87 The table below shows that modelled size requirements for the sub-area are broadly similar to that of Warrington.

Table 22: **Modelled size requirement by sub-area – market housing**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
East Warrington	4%	30%	56%	11%
Borough-wide	4%	30%	52%	14%
Variation	0%	0%	4%	-3%

Source: Housing Market Model

- 1.1 The table below shows that modelled size requirements for the sub-area are broadly similar to that of Warrington, but that there should be slightly more 3-bedroom homes and slightly fewer 2-bedroom homes.

Table 23: **Modelled size requirement by sub-area – affordable home ownership**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
East Warrington	18%	37%	38%	8%
Borough-wide	18%	43%	31%	8%
Variation	0%	-6%	7%	0%

Source: Housing Market Model

- 1.2 The Housing Market Model for social/affordable rented homes for this sub-area is broadly similar to the modelled outputs for Warrington, but with a somewhat higher provision of 1-bedroom homes.

Table 24: **Modelled size requirement by sub-area – social/affordable rented homes**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
East Warrington	43%	27%	28%	2%
Borough-wide	39%	27%	30%	3%
Variation	4%	0%	-2%	-1%

Source: Housing Market Model

Wider evidence

- 1.3 The Housing Market Model provides a starting point for considering whether variations to the Borough recommendations as regards housing mix are appropriate within each of the sub-areas.
- 1.4 As noted in part 1, the Housing Market Model is not a perfect tool to understand demand for different types and sizes of home in that it bakes in market imbalances in the 2011 Census data.
- 1.5 This section of the report, therefore, gathers data relating to demand and supply of homes together with market signals that indicate whether furthered adjustment may be justified to the housing market model recommendations in order to improve households' ability to access homes suited to their needs.

Demand

Population size

- 1.6 The sub-area's population is a large proportion of Warrington's total population but has decreased slightly since 2011.

Table 25: **Population change 2011 – 19**

Area	2011	2019	Change	% change
East Warrington	48,269	47,871	-398	-0.8%
Warrington	202,709	210,014	7,305	3.6%
Proportion	23.8%	22.8%		

Source: ONS Population Estimates

Age structure

- 1.7 The sub-area has higher concentrations of older people compared to Warrington on average, but more young people have arrived since 2011. This suggests the area is attractive to families.

Table 26: **Age structure 2019**

Area	0-15	16-24	25-34	35-54	55-64	65-74	75-89	90+
East Warrington	19.0%	9.1%	11.9%	26.0%	14.0%	11.9%	7.5%	0.5%
Warrington	18.9%	9.3%	12.5%	27.6%	12.9%	10.3%	7.8%	0.8%
Variation	0.1%	-0.2%	-0.5%	-1.6%	1.1%	1.7%	-0.4%	-0.2%

Source: ONS Population Estimates

Table 27: **Age structure change 2011-19**

Area	0-15	16-24	25-34	35-54	55-64	65-74	75-89	90+
East Warrington	8.0%	4.5%	24.9%	-16.5%	17.8%	-2.5%	-7.0%	-34.9%
Warrington	2.3%	-11.2%	5.9%	-3.9%	11.7%	18.4%	28.8%	32.7%
Variation	5.7%	15.7%	19.0%	-12.6%	6.1%	-20.9%	-35.8%	-67.6%

Source: ONS Population Estimates

Table 28: **Older persons population, 2019**

Area	Under 65	65-74	75-84	85+	Total	Total 65+	Total 75+
East Warrington	80.0%	11.9%	6.2%	1.8%	100.0%	20.0%	8.0%
Warrington	81.1%	10.3%	6.4%	2.2%	100.0%	18.9%	8.6%
Variation	-1.1%	1.6%	-0.2%	-0.4%	0.0%	1.1%	-0.6%

Source: ONS Population Estimates

Household composition

- 1.8 In 2011, the profile of households in the sub-area shows that there are a slightly lower proportion of married couples in East Warrington compared to the Borough average, but a similar proportion with dependent children.

Table 29: **Household composition 2011**

Area	Married couple	Cohabiting couple	Lone parent	Other households	All other households	Total	Total with dependent children
East Warrington	14.8%	4.8%	8.5%	1.7%	70.1%	100.0%	29.9%
Warrington	17.4%	4.4%	7.3%	1.7%	69.1%	100.0%	30.9%
Variation	-2.6%	0.4%	1.2%	0.0%	1.0%	0.0%	-1.0%

Source: Census 2011

Prevalence of disability within the population

- 1.9 The table below indicates there is a higher level of disability in East Warrington as compared to the Borough average.

Table 30: **Households and People with a Long-Term Health Problem or Disability, 2011 – sub-areas**

Area	Households Containing Someone with a Health Problem No.	Households Containing Someone with a Health Problem %	Population with a Health Problem No.	Population with a Health Problem %
East Warrington	7,137	34.6%	8,961	18.6%
Warrington	26,940	31.6%	34,997	17.3%
Variation		3.0%		1.3%

Source: Census 2011

Supply

The character of the current housing stock

- 1.10 There are lower proportions of detached homes and flats in this sub-area as compared to Warrington on the whole, but a greater proportion of semi-detached homes.

Table 31: **Type of dwellings, 2011**

Area	Detached	Semi-detached	Terraced	Flat	Caravan or other	All Types
East Warrington	22.1%	45.4%	24.1%	8.3%	0.1%	100.0%
Warrington	24.0%	41.3%	23.9%	10.8%	0.1%	100.0%
Variation	-1.9%	4.1%	0.2%	-2.5%	0.0%	0.0%

Source: Census 2011

- 1.11 This is reflected in the difference in the balance of different sizes of home, with a greater emphasis on dwellings 4 and 5 habitable rooms.

Table 32: **Dwellings by size, 2011**

Area	1 room	2 rooms	3 rooms	4 rooms	5 rooms	6 rooms	7 rooms	8+ rooms
East Warrington	0.3%	1.3%	8.7%	16.2%	31.2%	22.4%	10.3%	9.5%
Warrington	0.2%	1.5%	8.8%	14.6%	26.9%	21.9%	11.4%	14.7%
Variation	0.1%	-0.2%	-0.1%	1.6%	4.3%	0.5%	-1.1%	-5.2%

Source: Census 2011

- 1.12 The sub-area has lower concentrations of owned and shared ownership property tenures as compared to Warrington. The proportion of social rented homes is however greater.

Table 33: **Distribution of tenures, 2011**

Area	Owned	Shared Ownership	Social Rented	Private Rented
East Warrington	68.0%	0.5%	23.6%	7.1%
Warrington	72.2%	0.8%	15.8%	11.3%
Variation	-4.2%	-0.3%	7.8%	-4.2%

Source: Census 2011

- 1.1 Over the period from 2010-2020, the sub-area completed 344 dwellings or 6% of housing completions in the Borough.

Table 34: **Completions 2010-20**

Area	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	19/20	Total
East Warrington	1	20	0	77	50	83	3	37	66	7	344
Warrington	545	620	664	713	704	615	396	377	536	559	5,729
Proportion of total	0.2%	3.2%	0.0%	10.8%	7.1%	13.5%	0.8%	9.8%	12.3%	1.3%	6.0%

Source: Warrington Borough Council

- 1.2 The table below sets out the balance of sizes of home that have been brought forward over the past ten years in the sub-area. There is a balance between apartments and houses and a spread of dwellings across different sizes.

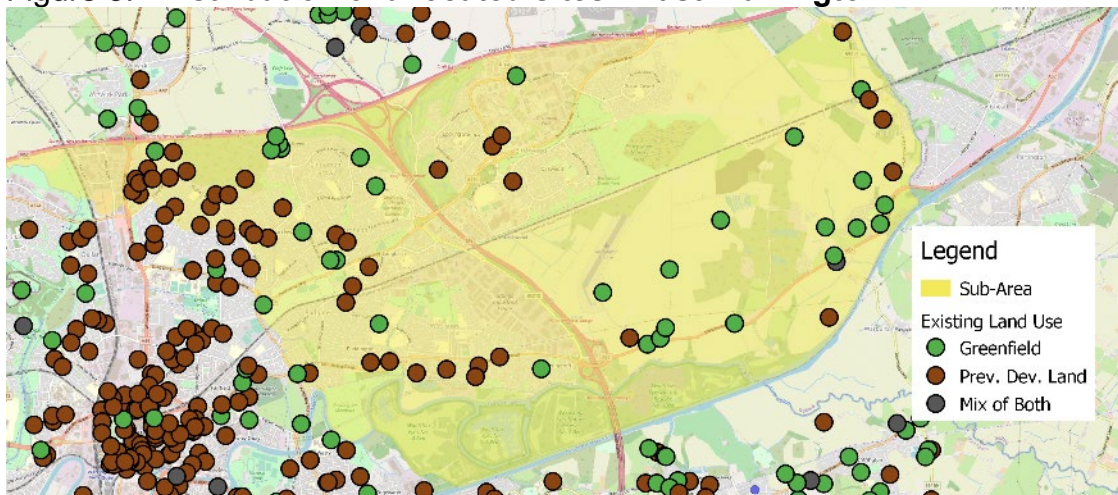
Table 35: Completions by size 2010-20

Year	1bed Apt	2 bed Apt	3 bed Apt	4 bed Apt	1 bed House	2 bed House	3 bed House	4 bed House
2010/11					1			
2011/12	3	4				12		1
2012/13								
2013/14	14	56	2					5
2014/15	9	5					7	29
2015/16						24	24	35
2016/17							3	
2017/18	1	9				10	9	8
2018/19						40	26	
2019/20							3	2
Grand Total	27	74	2		1	86	72	80
% of Warrington	7%	6%	20%	0%	2%	13%	4%	7%

Source: Warrington Borough Council

1.3 The map below indicates a significant number of greenfield sites in the sub-area.

Figure 3: Distribution of allocated sites - East Warrington



Source: GLH Analysis of WBC Data

- 1.4 As noted in the Table below, greenfield sites account for 82.3% of all allocated sites in East Warrington.

Table 36: **Balance of brownfield and greenfield sites (# of dwellings)**

Area	GF	GF/PDL	PDL	Grand Total
East Warrington	82.3%	0.1%	17.5%	100.0%
Grand Total	22.2%	2.3%	75.5%	100.0%

Source: GLH Analysis of WBC Data

- 1.5 The table below shows that, the sub-area accounts for 11.4% of all sites and 14% of capacity suggesting the density expectations are close to the average for the Borough.

Table 37: **Sites and Net Capacity (# of dwellings)**

	# of Sites	Sum of Net Capacity
East Warrington	78	1,516
Warrington	683	10,847
Sub-area as a proportion of all capacity	11.4%	14.0%

Source: GLH Analysis of WBC Data

- 1.6 House price data indicates that the sub-area has lower average, median house prices compared to the Borough average. Lower quartile house prices are slightly higher.

Market signals

Table 38: **Median, average and lower quartile house prices**

	Median	Average	Lower Quartile
East Warrington	£174,000	£210,330	£135,000
Warrington	£195,000	£282,106	£131,850
Variation	-12.1%	-34.1%	2.3%

Source: Land Registry Price Paid (2020)

- 1.7 The sub-area's median income is somewhat lower than the Borough average.

Table 39: **Median income**

Area	Median income	As a % of the Borough average
East Warrington	£31,400	94.9%
Warrington	£33,100	

Source: ONS (2020)

Table 40: **Median affordability ratios**

Area	Median House Price	Median Income	Affordability Ratio
East Warrington	£174,000	£31,400	5.54
Warrington	£195,000	£33,100	5.89

Source: ONS (2020)

- 1.8 At the 2011 Census, a lower proportion of the sub-area is under-occupied as compared to Warrington.

Table 41: **Over-crowding and under-occupation**

Area	+2 or more	1	0	-1	-2 or less
East Warrington	36.6%	35.4%	25.3%	2.4%	0.3%
Warrington	39.9%	35.2%	22.5%	2.1%	0.3%
Variation	-3.3%	0.2%	2.8%	0.3%	0.0%

Source: Census 2011

- 1.9 As of the 2011 Census, there is a lower proportion of vacant properties in the sub-area as compared to Warrington.

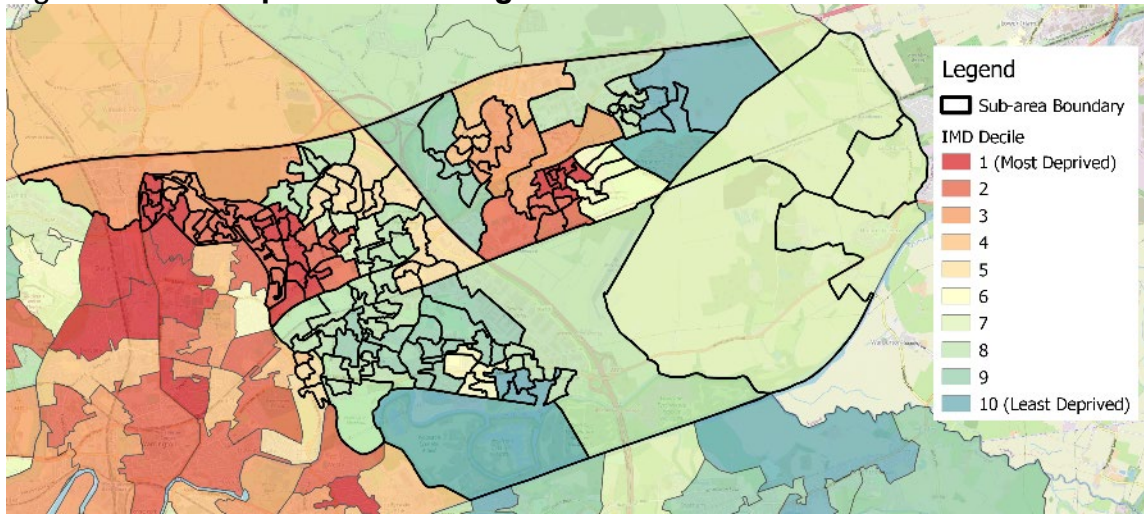
Table 42: **Vacancy**

Area	All household spaces	No usual residents	%
East Warrington	21,094	473	2.20%
Warrington	87,962	2,822	3.20%
Variation			-1.00%

Source: Census 2011

- 1.10 The map below sets out where the sub-area sits in terms of the metrics that constitute the Index of Multiple Deprivation (IMD). The sub-area contains both deprived and non-deprived areas.

Figure 4: IMD Map – East Warrington



Source: Indices of Multiple Deprivation, GLH

Conclusions – East Warrington

- The Housing Market Model concludes there is no evidence for the housing mix in the sub-area to vary from the Borough-level findings.
- The purpose of this sub-area is to provide larger family homes to young families. Indeed, the lower average and median house prices will encourage family households to move to East Warrington.
- While household income is lower, so too are house prices, making dwellings priced around the median more affordable than in the Borough as a whole.
- There is a need for high-quality family-sized homes (3 and 4-bedroom) that are affordable so as to address demand from family households.
- On the basis of the evidence gathered, there is no requirement for policy to depart from the size mix recommendations put forward by the Housing Market Model.

APPENDIX D: North West Warrington

Housing market model

- 1.11 The table below shows that modelled size requirements for the sub-area are broadly similar to that of Warrington.

Table 43: **Modelled size requirement by sub-area – market housing**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
NW Warrington	3%	30%	53%	13%
Borough-wide	4%	30%	52%	14%
Variation	-1%	0%	1%	-1%

Source: Housing Market Model

- 1.12 The table below shows that modelled size requirements for the sub-area encourage a greater provision of 3 and 4-bedroom homes, and lesser provision of 1 and 2-bedroom properties compared to Warrington as a whole.

Table 44: **Modelled size requirement by sub-area – affordable home ownership**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
NW Warrington	13%	37%	37%	13%
Borough-wide	18%	43%	31%	8%
Variation	-5%	-6%	6%	5%

Source: Housing Market Model

- 1.13 The Housing Market Model for social/affordable rented homes for this sub-area is broadly similar to the modelled outputs for Warrington, but with a somewhat higher provision of 3 and 4-bedroom homes.

Table 45: **Modelled size requirement by sub-area – social/affordable rented homes**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
NW Warrington	33%	27%	34%	6%
Borough-wide	39%	27%	30%	3%
Variation	-6%	0%	4%	3%

Source: Housing Market Model

Wider evidence

- 1.14 The Housing Market Model provides a starting point for considering whether variations to the Borough recommendations as regards housing mix are appropriate within each of the sub-areas.
- 1.15 As noted in part 1, the Housing Market Model is not a perfect tool to understand demand for different types and sizes of home in that it bakes in market imbalances in the 2011 Census data.
- 1.16 This section of the report, therefore, gathers data relating to demand and supply of homes together with market signals that indicate whether furthered adjustment may be justified to the Housing Market Model recommendations in order to improve households' ability to access homes suited to their needs.

Demand

Population size

- 1.17 The sub-area's population is a small proportion of Warrington's total population and has decreased slightly since 2011.

Table 46: **Population change 2011 – 19**

Area	2011	2019	Change	% change
NW Warrington	6,356	6,344	-12	-0.2%
Warrington	202,709	210,014	7,305	3.6%
Proportion	3.1%	3.0%		

Source: ONS Population Estimates

Age structure

- 1.18 The sub-area has higher concentrations of older people compared to Warrington on average, and that age group's population has increased since 2011. This suggests that North West Warrington is relatively popular with older people.

Table 47: **Age structure 2019**

Area	0-15	16-24	25-34	35-54	55-64	65-74	75-89	90+
NW Warrington	15.8%	8.9%	10.2%	26.5%	13.2%	11.8%	12.6%	1.0%
Warrington	18.9%	9.3%	12.5%	27.6%	12.9%	10.3%	7.8%	0.8%
Variation	-3.0%	-0.4%	-2.3%	-1.1%	0.3%	1.5%	4.7%	0.2%

Source: ONS Population Estimates

Table 48: **Age structure change 2011-19**

Area	0-15	16-24	25-34	35-54	55-64	65-74	75-89	90+
NW Warrington	-16.5%	-6.5%	33.7%	-15.9%	-0.1%	19.4%	49.6%	10.8%
Warrington	2.3%	-11.2%	5.9%	-3.9%	11.7%	18.4%	28.8%	32.7%
Variation	-18.8%	4.8%	27.8%	-11.9%	-11.7%	1.0%	20.8%	-21.9%

Source: ONS Population Estimates

Table 49: **Older persons population, 2019**

Area	Under 65	65-74	75-84	85+	Total	Total 65+	Total 75+
NW Warrington	74.6%	11.8%	10.6%	3.0%	100.0%	25.4%	13.6%
Warrington	81.1%	10.3%	6.4%	2.2%	100.0%	18.9%	8.6%
Variation	-6.5%	1.5%	4.2%	0.8%	0.0%	6.5%	5.0%

Source: ONS Population Estimates

Household composition

- 1.1 In 2011, the profile of households in the sub-area shows that there are higher concentrations of married couples compared to Warrington.

Table 50: **Household composition 2011**

Area	Married couple	Cohabiting couple	Lone parent	Other households	All other households	Total	Total with dependent children
NW Warrington	19.1%	4.4%	5.3%	1.3%	70.0%	100.0%	30.0%
Warrington	17.4%	4.4%	7.3%	1.7%	69.1%	100.0%	30.9%
Variation	1.7%	0.0%	-2.0%	-0.4%	0.9%	0.0%	-0.9%

Source: Census 2011

Prevalence of disability within the population

- 1.1 There is a higher level of disability in this sub-area as compared to Warrington. This reflects the higher prevalence of older people in the sub-area compared with the Borough as a whole.

Table 51: **Households and People with a Long-Term Health Problem or Disability, 2011 – sub-areas**

Area	Households Containing Someone with a Health Problem No.	Households Containing Someone with a Health Problem %	Population with a Health Problem No.	Population with a Health Problem %
NW Warrington	908	35.5%	1,365	21.5%
Warrington	26,940	31.6%	34,997	17.3%
Variation	-	3.9%	-	4.2%

Source: Census 2011

Supply

The character of the current housing stock

- 1.1 There are higher proportions of detached and semi-detached homes in this sub-area as compared to Warrington on the whole.

Table 52: **Type of dwellings, 2011**

Area	Detached	Semi-detached	Terraced	Flat	Caravan or other	All Types
NW Warrington	27.2%	48.4%	21.2%	3.0%	0.2%	100.0%
Warrington	24.0%	41.3%	23.9%	10.8%	0.1%	100.0%
Variation	3.2%	7.1%	-2.7%	-7.8%	0.1%	0.0%

Source: Census 2011

- 1.2 This is reflected in the difference in the balance of different sizes of home, with a greater emphasis on those of somewhat larger size.

Table 53: Dwellings by size (habitable rooms), 2011

Area	1 room	2 rooms	3 rooms	4 rooms	5 rooms	6 rooms	7 rooms	8+ rooms
NW Warrington	0.1%	0.7%	3.0%	11.5%	30.4%	25.3%	11.0%	18.0%
Warrington	0.2%	1.5%	8.8%	14.6%	26.9%	21.9%	11.4%	14.7%
Variation	-0.1%	-0.8%	-5.8%	-3.1%	3.5%	3.4%	-0.4%	3.3%

Source: Census 2011

- 1.1 The sub-area has higher concentrations of owned properties as compared to Warrington.

Table 54: Distribution of tenures, 2011

Area	Owned	Shared Ownership	Social Rented	Private Rented
NW Warrington	83.10%	0.30%	8.20%	7.40%
Warrington	72.20%	0.80%	15.80%	11.30%
Variation	10.90%	-0.50%	-7.60%	-3.90%

Source: Census 2011

- 1.1 Over the period from 2010-2020, the sub-area completed a small proportion of overall housing completions in the Borough.

Table 55: Completions 2010-20

Area	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	19/20	Total
NW Warrington	1	1	0	4	15	2	0	1	2	5	31
Warrington	545	620	664	713	704	615	396	377	536	559	5,729
Proportion of total	0.2%	0.2%	0.0%	0.6%	2.1%	0.3%	0.0%	0.3%	0.4%	0.9%	0.5%

Source: Warrington Borough Council

- 1.2 The table below sets out the balance of sizes of home that have been brought forward over the past ten years in the sub-area. This clearly points to a bias towards larger dwellings in the area.

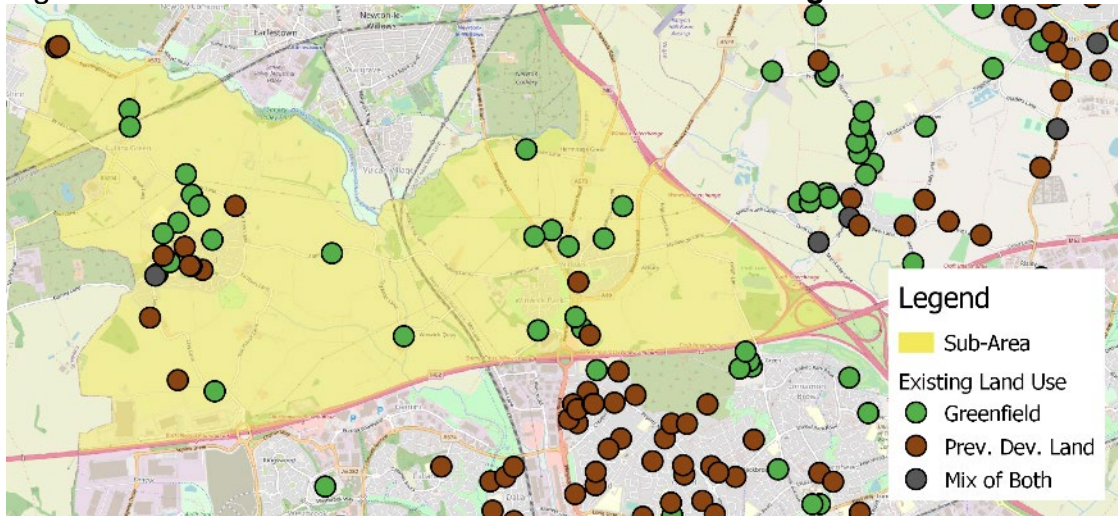
Table 56: Completions by size 2010-20

Year	1bed Apt	2 bed Apt	3 bed Apt	4 bed Apt	1 bed House	2 bed House	3 bed House	4 bed House
2010/11								1
2011/12								1
2012/13								
2013/14	4							
2014/15							1	14
2015/16						2		
2016/17								
2017/18								1
2018/19						1		1
2019/20								
Grand Total	4					3	1	18
% of Warrington	1%	0%	0%	0%	0%	0%	0%	2%

Source: Warrington Borough Council

- 1.1 The map below shows the distribution of allocated sites in the sub-area. The majority are greenfield.

Figure 5: Distribution of allocated sites – NW Warrington



Source: GLH Analysis of WBC Data

- 1.2 As noted in the Table below, Greenfield sites account for 69.1% of all allocated sites in North West Warrington.

Table 57: Balance of brownfield and greenfield sites (# of dwellings)

Area	GF	GF/PDL	PDL	Grand Total
North West Warrington	69.1%	25.8%	5.2%	100.0%
Grand Total	22.2%	2.3%	75.5%	100.0%

Source: GLH Analysis of WBC Data

- 1.3 The table below shows that while the sub-area accounts for a significant number of sites, they are over-whelming for single units and, as a result, contribute a very small number of units to overall Borough capacity.

Figure 6: Sites and Net Capacity (# of dwellings)

	# of Sites	Sum of Net Capacity
NW Warrington	35	39
Warrington	683	10,847
Sub-area as a proportion of all capacity	5.10%	0.40%

Source: GLH Analysis of WBC Data

- 1.1 House price data indicates that the sub-area has lower average house prices as compared to Warrington.

Market signals

Table 58: **Median, average and lower quartile house prices**

	Median	Average	Lower Quartile
NW Warrington	£177,500	£214,570	£134,750
Warrington	£195,000	£282,106	£131,850
Variation	9.9%	31.5%	-2.2%

Source: Land Registry Price Paid (2020)

- 1.1 The sub-area's median income is somewhat lower than the Borough average.

Table 59: **Median income**

Area	Median income	As a % of the Borough average
NW Warrington	£32,600	98.5%
Warrington	£33,100	

Source: ONS (2020)

Table 60: **Median affordability ratios**

Area	Median House Price	Median Income	Affordability Ratio
NW Warrington	£177,500	£32,600	5.44
Warrington	£195,000	£33,100	5.89

Source: ONS (2020)

- 1.2 At the 2011 Census, a larger proportion of the sub-area is under-occupied as compared to Warrington.

Table 61: **Over-crowding and under-occupation**

Area	+2 or more	1	0	-1	-2 or less
NW Warrington	47.40%	36.40%	14.40%	1.60%	0.20%
Warrington	39.90%	35.20%	22.50%	2.10%	0.30%
Variation	7.50%	1.20%	-8.00%	-0.50%	-0.10%

Source: Census 2011

- 1.3 As of the 2011 Census, there is a higher proportion of vacant properties in the sub-area as compared to Warrington.

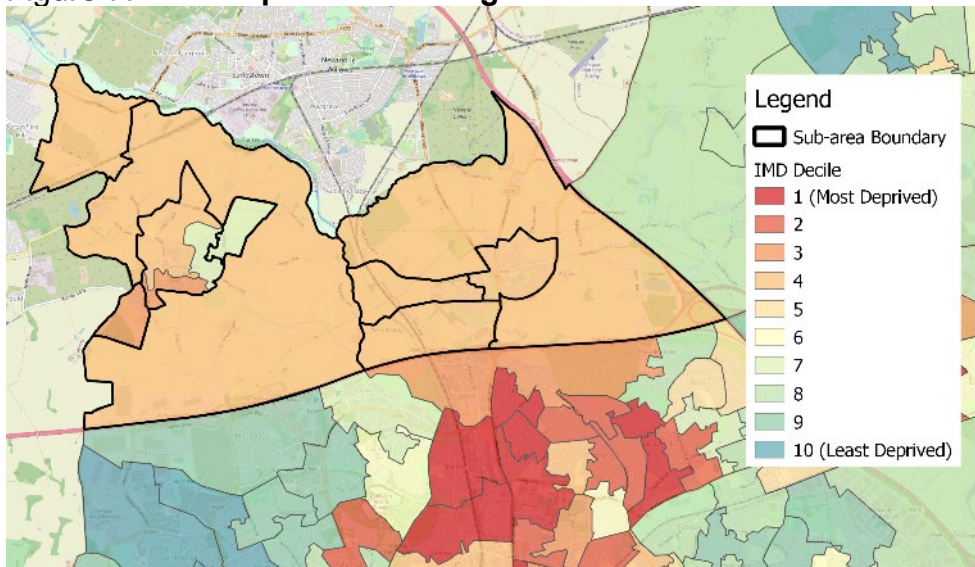
Table 62: **Vacancy**

Area	All household spaces	No usual residents	%
NW Warrington	2,670	113	4.20%
Warrington	87,962	2,822	3.20%
Variation			1.00%

Source: Census 2011

- 1.4 The map below sets out where the sub-area sits in terms of the metrics that constitute the Index of Multiple Deprivation (IMD). The sub-area contains mostly deprived areas.

Figure 7: **IMD Map – NW Warrington**



Source: Indices of Multiple Deprivation, GLH

Conclusions – North West Warrington

- The Housing Market Model concludes there is no evidence for the housing mix in the sub-area to vary from the Borough-level findings.
- The purpose of North West Warrington within the wider housing market is to provide homes for older households and larger homes to growing families.
- Given this profile, there is a need for high-quality affordable family-sized homes (3 and 4-bedroom).

- There is also an argument for increasing the number of smaller dwellings. These may be attractive to newly forming households given the relatively low house prices.
- Smaller homes may also facilitate "right-sizing" for older residents given the high relative proportion of homes that are "under-occupied".
- There is also a significant number of vacant units; rather than suggesting an over-supply of homes this is likely to point to misalignments between supply and demand.
- Despite this, the sub-area has seen relatively little development in recent years.
- On the basis of the evidence gathered, there is no requirement for policy to depart from the size mix recommendations put forward by the Housing Market Model.

APPENDIX E: NE Warrington

Housing market model

- 1.5 The table below shows that modelled size requirements for the sub-area are broadly similar to that of Warrington, but with slightly more 4+ bedroom homes.

Table 63: **Modelled size requirement by sub-area – market housing**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
NE Warrington	4%	29%	48%	20%
Borough-wide	4%	30%	52%	14%
Variation	0%	-1%	-4%	6%

Source: Housing Market Model

- 1.6 The table below shows that modelled size requirements for the sub-area have a somewhat greater provision of 3 and 4-bedroom homes, and a somewhat lesser provision of 1 and 2-bedroom homes.

Table 64: **Modelled size requirement by sub-area – affordable home ownership**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
NE Warrington	15%	36%	36%	13%
Borough-wide	18%	43%	31%	8%
Variation	-3%	-7%	5%	5%

Source: Housing Market Model

- 1.7 The Housing Market Model for social/affordable rented homes for this sub-area is broadly similar to the modelled outputs for Warrington, but with a somewhat lower provision of 1-bedroom homes.

Table 65: **Modelled size requirement by sub-area – social/affordable rented homes**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
NE Warrington	34%	29%	33%	4%
Borough-wide	39%	27%	30%	3%
Variation	-5%	2%	3%	1%

Source: Housing Market Model

Wider evidence

- 1.8 The Housing Market Model provides a starting point for considering whether variations to the Borough recommendations as regards housing mix are appropriate within each of the sub-areas.
- 1.9 As noted in part 1, the Housing Market Model is not a perfect tool to understand demand for different types and sizes of home in that it bakes in market imbalances in the 2011 Census data.
- 1.10 This section of the report, therefore, gathers data relating to demand and supply of homes together with market signals that indicate whether furthered adjustment may be justified to the borough-level recommendations in order to improve households' ability to access homes suited to their needs.

Demand

Population size

- 1.11 The sub-area's population is a small proportion of Warrington's total population and has increased slightly since 2011.

Table 66: **Population change 2011 – 19**

Area	2011	2019	Change	% change
NE Warrington	11,712	11,749	37	0.3%
Warrington	202,709	210,014	7,305	3.6%
Proportion	5.8%	5.6%		

Source: ONS Population Estimates

Age structure

- 1.12 The sub-area has higher concentrations of older people compared to Warrington on average. Over the period 2011 to 2019, the numbers of older people has increased substantially and by a significantly higher margin than the Borough as a whole.

- 1.13 As a result, in 2019, the older person's population constitutes a higher share of the population in North East Warrington than for the Borough as a whole.

Table 67: **Age structure 2019**

Area	0-15	16-24	25-34	35-54	55-64	65-74	75-89	90+
NE Warrington	15.8%	9.5%	10.5%	26.5%	14.6%	11.2%	10.7%	1.2%
Warrington	18.9%	9.3%	12.5%	27.6%	12.9%	10.3%	7.8%	0.8%
Variation	-3.1%	0.2%	-1.9%	-1.1%	1.7%	0.9%	2.9%	0.4%

Source: ONS Population Estimates

Table 68: **Age structure change 2011-19**

Area	0-15	16-24	25-34	35-54	55-64	65-74	75-89	90+
NE Warrington	20.1%	-34.2%	-58.2%	-6.4%	64.7%	110.0%	151.0%	157.4%
Warrington	2.3%	-11.2%	5.9%	-3.9%	11.7%	18.4%	28.8%	32.7%
Variation	17.8%	-22.9%	-64.1%	-2.5%	53.1%	91.6%	122.2%	124.7%

Source: ONS Population Estimates

Table 69: **Older persons population, 2019**

Area	Under 65	65-74	75-84	85+	Total	Total 65+	Total 75+
NE Warrington	76.9%	11.2%	8.5%	3.4%	100.0%	23.1%	11.9%
Warrington	81.1%	10.3%	6.4%	2.2%	100.0%	18.9%	8.6%
Variation	-4.2%	0.9%	2.1%	1.2%	0.0%	4.2%	3.3%

Source: ONS Population Estimates

Household composition

- 1.1 In 2011, the profile of households in the sub-area shows that there are higher concentrations of married couples compared to Warrington.

Table 70: **Household composition 2011**

Area	Married couple	Cohabiting couple	Lone parent	Other households	All other households	Total	Total with dependent children
NE Warrington	19.6%	3.5%	5.3%	1.7%	69.9%	100.0%	30.1%
Warrington	17.4%	4.4%	7.3%	1.7%	69.1%	100.0%	30.9%
Variation	2.2%	-0.9%	-2.0%	0.0%	0.8%	0.0%	-0.8%

Source: Census 2011

Prevalence of disability within the population

- 1.1 There is a slightly lower level of disability in this sub-area as compared to Warrington.

Table 71: **Households and People with a Long-Term Health Problem or Disability, 2011 – sub-areas**

Area	Households Containing Someone with a Health Problem No.	Households Containing Someone with a Health Problem %	Population with a Health Problem No.	Population with a Health Problem %
NE Warrington	1,425	32.0%	2,092	17.9%
Warrington	26,940	31.6%	34,997	17.3%
Variation		0.4%		0.6%

Source: Census 2011

Supply

The character of the current housing stock

- 1.1 There are higher proportions of detached homes in this sub-area as compared to Warrington on the whole.

Table 72: Type of dwellings, 2011

Area	Detached	Semi-detached	Terraced	Flat	Caravan or other	All Types
NE Warrington	44.1%	38.4%	12.1%	5.3%	0.1%	100.0%
Warrington	24.0%	41.3%	23.9%	10.8%	0.1%	100.0%
Variation	20.1%	-2.9%	-11.8%	-5.5%	0.0%	0.0%

Source: Census 2011

- 1.2 This is reflected in the difference in the balance of different sizes of home, with a greater emphasis on those of a larger size.

Table 73: Dwellings by size (habitable rooms), 2011

Area	1 room	2 rooms	3 rooms	4 rooms	5 rooms	6 rooms	7 rooms	8+ rooms
NE Warrington	0.0%	0.4%	4.4%	11.2%	20.3%	22.3%	15.7%	25.6%
Warrington	0.2%	1.5%	8.8%	14.6%	26.9%	21.9%	11.4%	14.7%
Variation	-0.2%	-1.1%	-4.4%	-3.4%	-6.6%	0.4%	4.3%	10.9%

Source: Census 2011

- 1.1 The sub-area has higher concentrations of owned properties as compared to Warrington.

Table 74: Distribution of tenures, 2011

Area	Owned	Shared Ownership	Social Rented	Private Rented
NE Warrington	82.10%	0.20%	9.20%	7.70%
Warrington	72.20%	0.80%	15.80%	11.30%
Variation	9.90%	-0.60%	-6.60%	-3.60%

Source: Census 2011

- 1.1 Over the period from 2010-2020, the sub-area completed 188 dwellings (or 3.3% of overall Borough supply).

Table 75: Completions 2010-20

Area	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	19/20	Total
NE Warrington	28	11	8	7	27	50	6	10	7	34	188
Warrington	545	620	664	713	704	615	396	377	536	559	5,729
Proportion of total	5.1%	1.8%	1.2%	1.0%	3.8%	8.1%	1.5%	2.7%	1.3%	6.1%	3.3%

Source: Warrington Borough Council

- 1.2 The table below sets out the balance of sizes of home that have been brought forward over the past ten years in the sub-area. This clearly points to a bias towards larger dwellings in the area.

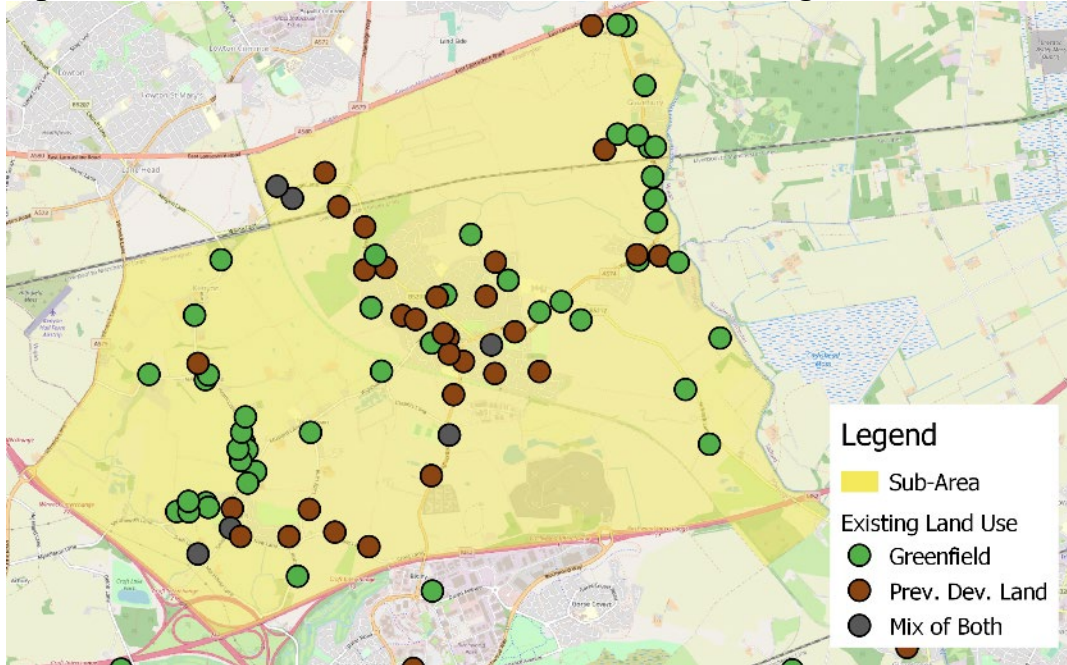
Table 76: Completions by size 2010-20

Year	1bed Apt	2 bed Apt	3 bed Apt	4 bed Apt	1 bed House	2 bed House	3 bed House	4 bed House
2010/11						11	13	4
2011/12						1	5	5
2012/13	5						1	2
2013/14							1	6
2014/15	3	4					1	19
2015/16						6	10	34
2016/17	1	1					2	2
2017/18		1		1		3	5	
2018/19							3	4
2019/20								
Grand Total	9	6		1		21	41	76
% of Warrington	2%	1%	0%	20%	0%	3%	2%	6%

Source: Warrington Borough Council

- 1.1 The map below indicates that the land supply pipeline in the sub-area is a mix of brown and greenfield sites.

Figure 8: Distribution of allocated sites – NE Warrington



Source: GLH Analysis of WBC Data

- 1.2 As noted in the table below, brownfield sites account for around 86% of all allocated sites in the sub-area.

Table 77: Balance of brownfield and greenfield sites (# of dwellings)

Area	GF	GF/PDL	PDL	Grand Total
North East Warrington	14.1%	0.0%	85.9%	100.0%
Grand Total	22.2%	2.3%	75.5%	100.0%

Source: GLH Analysis of WBC Data

- 1.3 The table below shows that most of the sites are single unit developments. Therefore, while the sub-area account for around 14% of all sites in the Borough, these sites are expected to generate only 1% of net capacity.

Table 78: Sites and Net Capacity (# of dwellings)

Row Labels	# of Sites	Sum of Net Capacity
NE Warrington	95	112
Warrington	683	10,847
Sub-area as a proportion of all capacity	13.9%	1.0%

Source: GLH Analysis of WBC Data

Market signals

- 1.1 House price data indicates that the sub-area has substantially higher average, median and lower quartile house prices as compared to Warrington.

Table 79: Median, average and lower quartile house prices

	Median	Average	Lower Quartile
NE Warrington	£300,000	£362,654	£214,250
Warrington	£195,000	£282,106	£131,850
Median	53.85%	28.55%	62.50%

Source: Land Registry Price Paid (2020)

- 1.2 The sub-area's median income is somewhat higher than the Borough average.

Table 80: Median income

Area	Median income	As a % of the Borough average
NE Warrington	£36,200	109.4%
Warrington	£33,100	

Source: ONS (2020)

Table 81: Median affordability ratios

Area	Median House Price	Median Income	Affordability Ratio
NE Warrington	£300,000	£36,200	8.29
Warrington	£195,000	£33,100	5.89

Source: ONS (2020)

- 1.3 At the 2011 Census, a larger proportion of the sub-area is under-occupied as compared to Warrington.

Table 82: Over-crowding and under-occupation

Area	+2 or more	1	0	-1	-2 or less
NE Warrington	53.7%	32.5%	12.7%	0.8%	0.2%
Warrington	39.9%	35.2%	22.5%	2.1%	0.3%
Variation	13.8%	-2.7%	-9.7%	-1.4%	0.0%

Source: Census 2011

- 1.4 As of the 2011 Census, there is a slightly higher proportion of vacant properties in the sub-area as compared to Warrington.

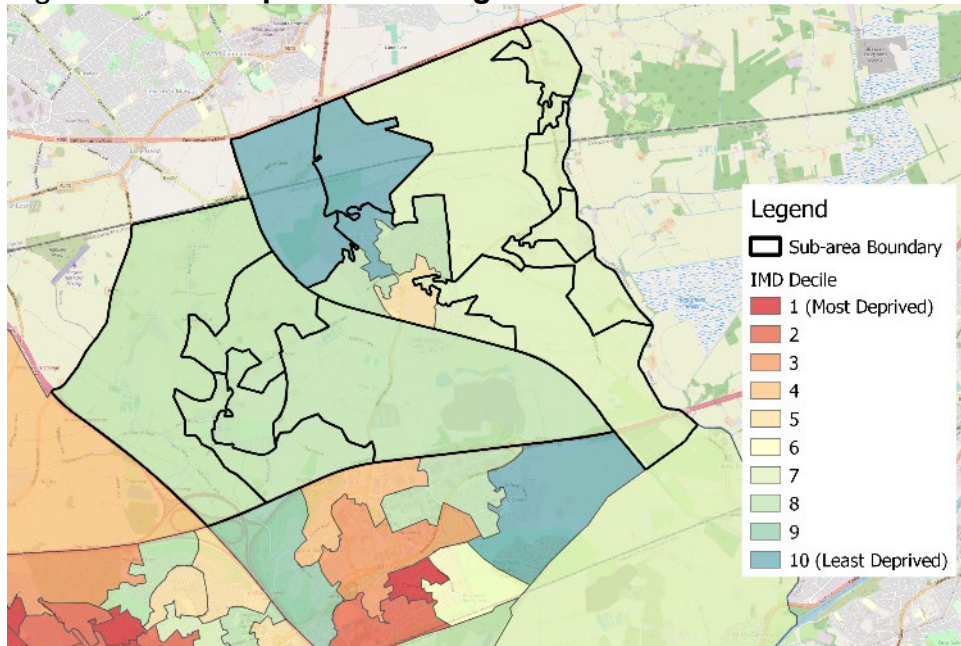
Table 83: Vacancy

Area	All household spaces	No usual residents	%
NE Warrington	4,638	181	3.90%
Warrington	87,962	2,822	3.20%
Variation			0.70%

Source: Census 2011

- 1.5 The map below sets out where the sub-area sits in terms of the metrics that constitute the Index of Multiple Deprivation (IMD). The sub-area has very little deprivation.

Figure 9: IMD Map – NE Warrington



Source: Indices of Multiple Deprivation, GLH

Conclusions – North East Warrington

- The Housing Market Model concludes there is evidence to support a higher proportion of 4+ bedroom homes in North East Warrington compared with the Borough-level findings.
- The sub-area has substantially higher average, median and lower quartile house prices as compared to Warrington. This is accompanied by higher median income.
- The median affordability ratio is significantly higher at 8.29 compared with a Borough average of 5.89.
- There is evidence of substantial under-occupation of homes. Around 54% of Households have 2 or more spare rooms. This is greater than the Borough average of 40% by around 14%.
- On the basis of the evidence gathered, it is worth noting the misalignment between supply and demand in sizes of home. It would therefore be advisable for a higher number of smaller units to be provided to facilitate “right-sizing” on the part of older households.
- This would be likely to release larger dwellings onto the market suited to family households. In so doing, this may stabilise house-prices and improve affordability.

- It is notable that the market has delivered a high proportion of dwellings of 4+ bedrooms in recent years (around 50% of all homes). It will therefore require active policy to bring future delivery more in line with mix put forward in the Housing Market Model (this recommends future supply should include 20% of dwellings of this size).
- There is no requirement for policy to depart from the size mix recommendations put forward by the Housing Market Model, indeed guiding development towards a size mix that is closer to these recommendations will help address some of the misalignments that have been detected.

APPENDIX F: South Warrington

Housing market model

- 1.6 The table below shows that modelled size requirements for market housing the sub-area are broadly similar to that of Warrington, with somewhat more 4+ bedroom homes.

Table 84: **Modelled size requirement by sub-area – market housing**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
South Warrington	4%	28%	49%	19%
Borough-wide	4%	30%	52%	14%
Variation	0%	-2%	-3%	5%

Source: Housing Market Model

- 1.7 The table below shows that modelled size requirements in respect of affordable home ownership for the sub-area are broadly similar to that of Warrington, albeit with a slightly higher provision of 3 and 4-bedroom homes.

Table 85: **Modelled size requirement by sub-area – affordable home ownership**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
South Warrington	15%	40%	35%	10%
Borough-wide	18%	43%	31%	8%
Variation	-3%	-3%	4%	2%

Source: Housing Market Model

- 1.8 The Housing Market Model for social/affordable rented homes for this sub-area is broadly similar to the modelled outputs for Warrington, but with a higher provision of 1-bedroom homes.

Table 86: **Modelled size requirement by sub-area – social/affordable rented homes**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
South Warrington	46%	24%	27%	3%
Borough-wide	39%	27%	30%	3%
Variation	7%	-3%	-3%	0%

Source: Housing Market Model

Wider evidence

- 1.9 The Housing Market Model provides a starting point for considering whether variations to the Borough recommendations as regards housing mix are appropriate within each of the sub-areas.
- 1.10 As noted in part 1, the Housing Market Model is not a perfect tool to understand demand for different types and sizes of home in that it bakes in market imbalances in the 2011 Census data.
- 1.11 This section of the report, therefore, gathers data relating to demand and supply of homes together with market signals that indicate whether furthered adjustment may be justified to the Housing Market Model recommendations in order to improve households' ability to access homes suited to their needs.

Demand

Population size

- 1.12 The sub-area's population is a sizeable proportion of Warrington's total population but has decreased somewhat since 2011.

Table 87: **Population change 2011 – 19**

Area	2011	2019	Change	% change
South Warrington	29,798	28,983	-815	-2.7%
Warrington	202,709	210,014	7,305	3.6%
Proportion	14.7%	13.8%		

Source: ONS Population Estimates

Age structure

- 1.13 The sub-area has higher concentrations of older people compared to Warrington on average, and that age group's population has increased since 2011. The proportion of households that are younger (and likely to be predominantly family households) is less than the Borough average and has fallen over the period.

Table 88: **Age structure 2019**

Area	0-15	16-24	25-34	35-54	55-64	65-74	75-89	90+
South Warrington	17.1%	8.6%	7.4%	28.4%	15.2%	11.9%	10.0%	1.4%
Warrington	18.9%	9.3%	12.5%	27.6%	12.9%	10.3%	7.8%	0.8%
Variation	-1.7%	-0.7%	-5.1%	0.9%	2.3%	1.6%	2.2%	0.6%

Source: ONS Population Estimates

Table 89: **Age structure change 2011-19**

Area	0-15	16-24	25-34	35-54	55-64	65-74	75-89	90+
South Warrington	-11.8%	-32.1%	-57.6%	5.4%	60.2%	55.1%	72.8%	107.5%
Warrington	2.3%	-11.2%	5.9%	-3.9%	11.7%	18.4%	28.8%	32.7%
Variation	-14.1%	-20.9%	-63.5%	9.3%	48.5%	36.7%	44.0%	74.9%

Source: ONS Population Estimates

Table 90: **Older persons population, 2019**

Area	Under 65	65-74	75-84	85+	Total	Total 65+	Total 75+
South Warrington	76.7%	11.9%	7.9%	3.5%	100.0%	23.3%	11.4%
Warrington	81.1%	10.3%	6.4%	2.2%	100.0%	18.9%	8.6%
Variation	-4.4%	1.6%	1.5%	1.3%	0.0%	4.4%	2.8%

Source: ONS Population Estimates

Household composition

- 1.1 Despite the age structure data presented above, in 2011 the household composition in the sub-area shows that there are higher concentrations of married couples compared to Warrington as a whole. The explanation may be that they fall into older age groups.

Table 91: **Household composition 2011**

Area	Married couple	Cohabiting couple	Lone parent	Other households	All other households	Total	Total with dependent children
South Warrington	23.1%	3.0%	4.5%	1.2%	68.3%	100.0%	31.7%
Warrington	17.4%	4.4%	7.3%	1.7%	69.1%	100.0%	30.9%
Variation	5.7%	-1.4%	-2.8%	-0.5%	-0.8%	0.0%	0.8%

Source: Census 2011

Prevalence of disability within the population

- 1.1 There is a lower level of disability in this sub-area as compared to Warrington.

Table 92: **Households and People with a Long-Term Health Problem or Disability, 2011 – sub-areas**

Area	Households Containing Someone with a Health Problem No.	Households Containing Someone with a Health Problem %	Population with a Health Problem No.	Population with a Health Problem %
South Warrington	3,327	27.6%	4,330	14.5%
Warrington	26,940	31.6%	34,997	17.3%
Variation		-4.0%		-2.8%

Source: Census 2011

Supply

The character of the current housing stock

- 1.1 There are higher proportions of detached and semi-detached homes in this sub-area as compared to Warrington on the whole.

Table 93: **Type of dwellings, 2011**

Area	Detached	Semi-detached	Terraced	Flat	Caravan or other	All Types
South Warrington	35.1%	43.1%	14.3%	7.3%	0.2%	100.0%
Warrington	24.0%	41.3%	23.9%	10.8%	0.1%	100.0%
Variation	11.1%	1.8%	-9.6%	-3.5%	0.1%	0.0%

Source: Census 2011

- 1.2 This is reflected in the difference in the balance of different sizes of home, with a greater emphasis on those of a larger size.

Table 94: **Dwellings by size (habitable rooms), 2011**

Area	1 room	2 rooms	3 rooms	4 rooms	5 rooms	6 rooms	7 rooms	8+ rooms
South Warrington	0.1%	0.7%	4.4%	8.1%	16.3%	23.9%	16.8%	29.8%
Warrington	0.2%	1.5%	8.8%	14.6%	26.9%	21.9%	11.4%	14.7%
Variation	-0.1%	-0.8%	-4.4%	-6.5%	-10.6%	2.0%	5.4%	15.1%

Source: Census 2011

- 1.1 The sub-area has higher concentrations of owned properties as compared to Warrington.

Table 95: **Distribution of tenures, 2011**

Area	Owned	Shared Ownership	Social Rented	Private Rented
South Warrington	86.70%	0.50%	5.00%	6.90%
Warrington	72.20%	0.80%	15.80%	11.30%
Variation	14.50%	-0.30%	-10.80%	-4.40%

Source: Census 2011

- 1.1 Over the period from 2010-2020, the sub-area completed 265 dwellings. This represents 4.6% of all new dwellings built in the Borough over the period.

Table 96: Completions 2010-20

Area	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	19/20	Total
South Warrington	6	10	10	14	10	8	0	17	32	158	265
Warrington	545	620	664	713	704	615	396	377	536	559	5,729
Proportion of total	1.1%	1.6%	1.5%	2.0%	1.4%	1.3%	0.0%	4.5%	6.0%	28.3%	4.6%

Source: Warrington Borough Council

- 1.2 The table below sets out the balance of sizes of home that have been brought forward over the past ten years in the sub-area. This clearly points to a bias towards larger dwellings in the area.

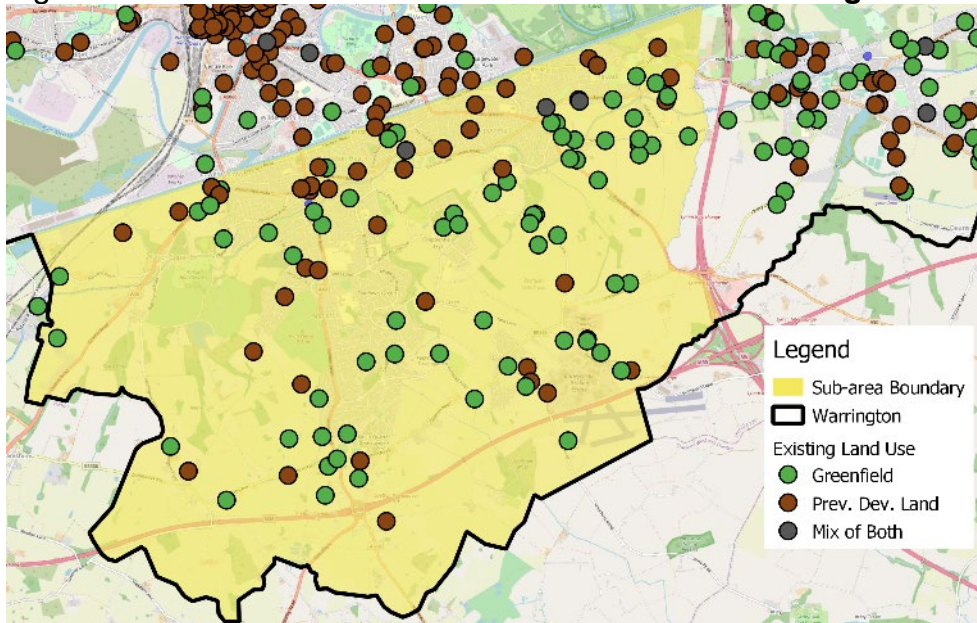
Table 97: Completions by size 2010-20

Year	1bed Apt	2 bed Apt	3 bed Apt	4 bed Apt	1 bed House	2 bed House	3 bed House	4 bed House
2010/11						1	2	3
2011/12		1					3	6
2012/13					1	1	1	7
2013/14	2	2			1	1	4	4
2014/15							4	6
2015/16						2		6
2016/17								
2017/18					1		6	10
2018/19					1	1	15	15
2019/20								1
Grand Total	2	3			4	6	35	58
% of Warrington	1%	0%	0%	0%	9%	1%	2%	5%

Source: Warrington Borough Council

- 1.1 The map below indicates the heavy reliance on greenfield sites in the sub-area.

Figure 10: Distribution of allocated sites – South Warrington



Source: GLH Analysis of WBC Data

- 1.2 As noted in the Table below, greenfield sites account for 78.3% of all allocated sites in South Warrington.

Table 98: **Balance of brownfield and greenfield sites (# of dwellings)**

Area	GF	GF/PDL	PDL	Grand Total
South Warrington	78.3%	0.2%	21.6%	100%
Grand Total	22.2%	2.3%	75.5%	100%

Source: GLH Analysis of WBC Data

- 1.3 The table below shows that, while the overall proportion of sites is substantial (18.4%), the sub-area accounts for a smaller share of total capacity indicating most of the sites are small. That said, it is expected that South Warrington will contribute a substantial number of new homes in coming years (1,208).

Figure 11: **Sites and Net Capacity (# of dwellings)**

Row Labels	# of Sites	Sum of Net Capacity
South Warrington	126	1,208
Warrington	683	10,847
Sub-area as a proportion of all capacity	18.4%	11.1%

Source: GLH Analysis of WBC Data

- 1.1 House price data indicates that the sub-area has higher average, median and lower quartile house prices as compared to Warrington.

Market signals

- 1.2 The table below indicates that house prices in South Warrington in 2020 were substantially higher at all price points compared with the Borough average.

Table 99: **Median, average and lower quartile house prices**

	Median	Average	Lower Quartile
South Warrington	£313,000	£384,772	£245,000
Warrington	£195,000	£282,106	£131,850
Median	61%	36%	86%

Source: Land Registry Price Paid (2020)

- 1.3 The sub-area's median income is notably higher than the Borough average.

Table 100: **Median income**

Area	Median income	As a % of the Borough average
South Warrington	£40,500	122.4%
Warrington	£33,100	

Source: ONS (2020)

Table 101: **Median affordability ratios**

Area	Median House Price	Median Income	Affordability Ratio
South Warrington	£313,000	£40,500	7.73
Warrington	£195,000	£33,100	5.89

Source: ONS (2020)

- 1.4 At the 2011 Census, a larger proportion of the sub-area is under-occupied as compared to Warrington.

Table 102: **Over-crowding and under-occupation**

Area	+2 or more	1	0	-1	-2 or less
South Warrington	54.60%	31.40%	13.20%	0.80%	0.10%
Warrington	39.90%	35.20%	22.50%	2.10%	0.30%
Variation	14.60%	-3.90%	-9.30%	-1.30%	-0.20%

Source: Census 2011

- 1.5 As of the 2011 Census, there is a similar proportion of vacant properties in the sub-area as compared to Warrington.

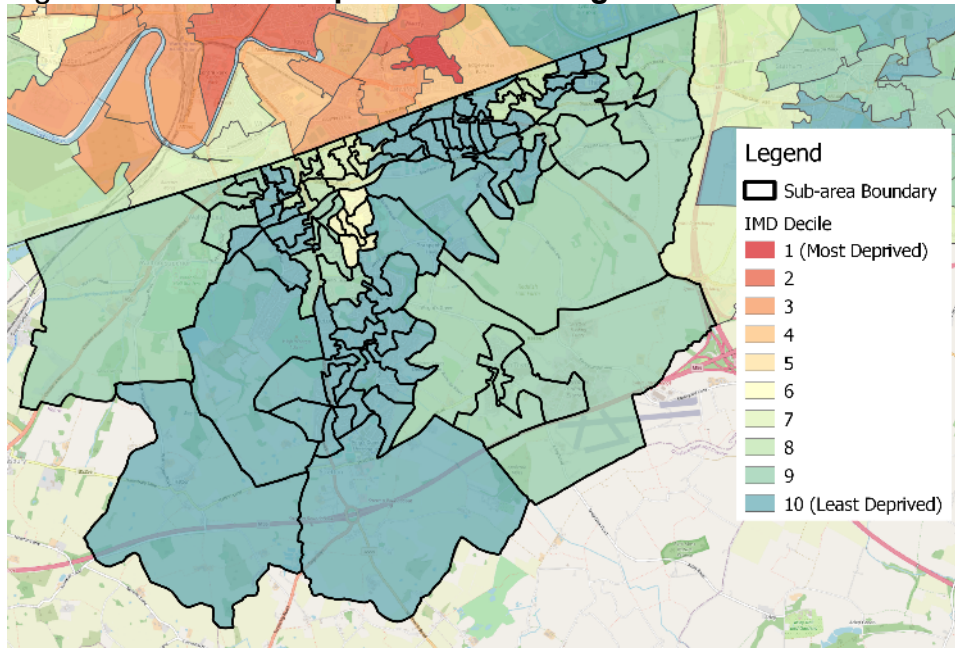
Table 103: **Vacancy**

Area	All household spaces	No usual residents	%
South Warrington	12,461	403	3.20%
Warrington	87,962	2,822	3.20%
Variation			0.00%

Source: Census 2011

- 1.6 The map below sets out where the sub-area sits in terms of the metrics that constitute the Index of Multiple Deprivation (IMD). The sub-area contains no real deprived areas.

Figure 12: **IMD Map – South Warrington**



Source: Indices of Multiple Deprivation, GLH

Conclusions – South Warrington

- The Housing Market Model concludes there is evidence to support a higher proportion of 4+ bedroom market and affordable home ownership dwellings in North East Warrington compared with the Borough-level findings. Also, a greater proportion of 1 bedroom affordable rented units.
- It is arguable that the purpose of this sub-area is to provide larger, more premium and family homes to mature families and empty-nesters.
- South Warrington is one of the most affluent parts of the Borough. Median incomes are around 22% higher than the borough average.
- House prices across all price points are also higher. This results in a Median Affordability Ratio that is 31% higher than that of the borough (7.73 v 5.89). This means that households with an income around the median will not be able to afford a home in the sub-area.
- As with other more affluent parts of the Borough, South Warrington experiences greater under-occupation of homes.
- On the basis of the evidence gathered, it is worth noting the misalignment between supply and demand in sizes of home. It would therefore be advisable

for a higher number of smaller units to be provided to facilitate “right-sizing” on the part of older households.

- This would be likely to release larger dwellings onto the market suited to family households. In so doing, this may stabilise house-prices and improve affordability.
- It is notable that the market has delivered a high proportion of dwellings of 4+ bedrooms in recent years (around 54% of all homes). It will therefore require active policy to bring future delivery more in line with mix put forward in the Housing Market Model (this recommends future supply should include 19% of dwellings of this size).
- There is no requirement for policy to depart from the size mix recommendations put forward by the Housing Market Model, indeed guiding development towards a size mix that is closer to these recommendations will help address some of the misalignments that have been detected.

APPENDIX G: West Warrington

Housing market model

1.7 The table below shows that modelled size requirements for market housing the sub-area are broadly similar to that of Warrington, with somewhat more 4+ bedroom homes.

Table 104: Modelled size requirement by sub-area – market housing

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
West Warrington	3%	26%	53%	18%
Borough-wide	4%	30%	52%	14%
Variation	-1%	-4%	1%	4%

Source: Housing Market Model

1.8 The table below shows that modelled size requirements for affordable home ownership units in the sub-area are broadly similar to that of Warrington, albeit with a slightly higher provision of 3 and 4 bedroom homes and a slightly smaller provision of 1 and 2-bedroom homes.

Table 105: Modelled size requirement by sub-area – affordable home ownership

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
West Warrington	16%	40%	35%	10%
Borough-wide	18%	43%	31%	8%
Variation	-2%	-3%	4%	2%

Source: Housing Market Model

1.9 The Housing Market Model for social/affordable rented homes for this sub-area is broadly similar to the modelled outputs for Warrington, but with a somewhat higher provision of 3 and 4-bedroom homes.

Table 106: **Modelled size requirement by sub-area – social/affordable rented homes**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
West Warrington	35%	26%	34%	5%
Borough-wide	39%	27%	30%	3%
Variation	-4%	-1%	4%	2%

Source: Housing Market Model

Wider evidence

- 1.10 The Housing Market Model provides a starting point for considering whether variations to the Borough recommendations as regards housing mix are appropriate within each of the sub-areas.
- 1.11 As noted in part 1, the Housing Market Model is not a perfect tool to understand demand for different types and sizes of home in that it bakes in market imbalances in the 2011 Census data.
- 1.12 This section of the report, therefore, gathers data relating to demand and supply of homes together with market signals that indicate whether furthered adjustment may be justified to the Housing Market Model recommendations in order to improve households' ability to access homes suited to their needs.

Demand

Population size

- 1.13 The sub-area's population is a large proportion of Warrington's total population and has increased since 2011.

Table 107: **Population change 2011 – 19**

Area	2011	2019	Change	% change
West Warrington	46,577	48,918	2,341	5.0%
Warrington	202,709	210,014	7,305	3.6%
Proportion	23.0%	23.3%		

Source: ONS Population Estimates

Age structure

- 1.14 The sub-area has an age profile that is broadly similar to Warrington, but some younger age groups have grown in population since 2011.

Table 108: **Age structure 2019**

Area	0-15	16-24	25-34	35-54	55-64	65-74	75-89	90+
West Warrington	19.2%	9.2%	11.6%	28.9%	12.7%	10.2%	7.5%	0.6%
Warrington	18.9%	9.3%	12.5%	27.6%	12.9%	10.3%	7.8%	0.8%
Variation	0.4%	-0.1%	-0.8%	1.3%	-0.2%	-0.1%	-0.4%	-0.1%

Source: ONS Population Estimates

Table 109: **Age structure change 2011-19**

Area	0-15	16-24	25-34	35-54	55-64	65-74	75-89	90+
West Warrington	2.8%	-22.1%	-1.2%	1.3%	-5.7%	12.5%	22.5%	27.5%
Warrington	2.3%	-11.2%	5.9%	-3.9%	11.7%	18.4%	28.8%	32.7%
Variation	0.5%	-10.9%	-7.1%	5.2%	-17.4%	-5.8%	-6.3%	-5.2%

Source: ONS Population Estimates

Table 110: **Older persons population, 2019**

Area	Under 65	65-74	75-84	85+	Total	Total 65+	Total 75+
West Warrington	81.7%	10.2%	6.3%	1.8%	100.0%	18.3%	8.1%
Warrington	81.1%	10.3%	6.4%	2.2%	100.0%	18.9%	8.6%
Variation	0.6%	-0.1%	-0.1%	-0.4%	0.0%	-0.6%	-0.5%

Source: ONS Population Estimates

Household composition

- 1.1 In 2011, the profile of households in the sub-area shows that there are higher concentrations of married couples and families with dependent children compared to Warrington.

Table 111: **Household composition 2011**

Area	Married couple	Cohabiting couple	Lone parent	Other households	All other households	Total	Total with dependent children
West Warrington	22.1%	4.4%	6.1%	1.9%	65.5%	100.0%	34.5%
Warrington	17.4%	4.4%	7.3%	1.7%	69.1%	100.0%	30.9%
Variation	4.7%	0.0%	-1.2%	0.2%	-3.6%	0.0%	3.6%

Source: Census 2011

Prevalence of disability within the population

- 1.1 There is a lower level of disability in this sub-area as compared to Warrington.

Table 112: **Households and People with a Long-Term Health Problem or Disability, 2011 – sub-areas**

Area	Households Containing Someone with a Health Problem No.	Households Containing Someone with a Health Problem %	Population with a Health Problem No.	Population with a Health Problem %
West Warrington	5,350	29.0%	7,108	15.3%
Warrington	26,940	31.6%	34,997	17.3%
Variation		-2.6%		-2.0%

Source: Census 2011

Supply

The character of the current housing stock

- 1.1 There are higher proportions of detached and semi-detached homes in this sub-area as compared to Warrington on the whole.

Table 113: **Type of dwellings, 2011**

Area	Detached	Semi-detached	Terraced	Flat	Caravan or other	All Types
West Warrington	34.4%	44.0%	15.4%	6.2%	0.0%	100.0%
Warrington	24.0%	41.3%	23.9%	10.8%	0.1%	100.0%
Variation	10.4%	2.7%	-8.5%	-4.6%	-0.1%	0.0%

Source: Census 2011

- 1.2 This is reflected in the difference in the balance of different sizes of home, with a greater emphasis on those of a larger size.

Table 114: **Dwellings by size (habitable rooms), 2011**

Area	1 room	2 rooms	3 rooms	4 rooms	5 rooms	6 rooms	7 rooms	8+ rooms
West Warrington	0.1%	0.8%	5.3%	10.8%	24.6%	24.8%	14.8%	18.8%
Warrington	0.2%	1.5%	8.8%	14.6%	26.9%	21.9%	11.4%	14.7%
Variation	-0.1%	-0.7%	-3.5%	-3.8%	-2.3%	2.9%	3.4%	4.1%

Source: Census 2011

- 1.1 The sub-area has higher concentrations of owned and shared ownership property tenures as compared to Warrington.

Table 115: **Distribution of tenures, 2011**

Area	Owned	Shared Ownership	Social Rented	Private Rented
West Warrington	81.60%	1.40%	7.20%	9.20%
Warrington	72.20%	0.80%	15.80%	11.30%
Variation	9.40%	0.60%	-8.60%	-2.10%

Source: Census 2011

- 1.1 Over the period from 2010-2020, the sub-area completed 2,009 dwellings. This constitutes a large proportion of housing completions out of Warrington as a whole (around 35%).

Table 116: Completions 2010-20

Area	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	19/20	Total
West Warrington	205	246	255	165	186	187	134	104	273	254	2,009
Warrington	545	620	664	713	704	615	396	377	536	559	5,729
Proportion of total	37.6%	39.7%	38.4%	23.1%	26.4%	30.4%	33.8%	27.6%	50.9%	45.4%	35.1%

Source: Warrington Borough Council

- 1.2 The table below sets out the balance of sizes of home that have been brought forward over the past ten years in the sub-area. This points to a bias towards larger dwellings in the area, but also a provision of 1 and 2-bed flats.

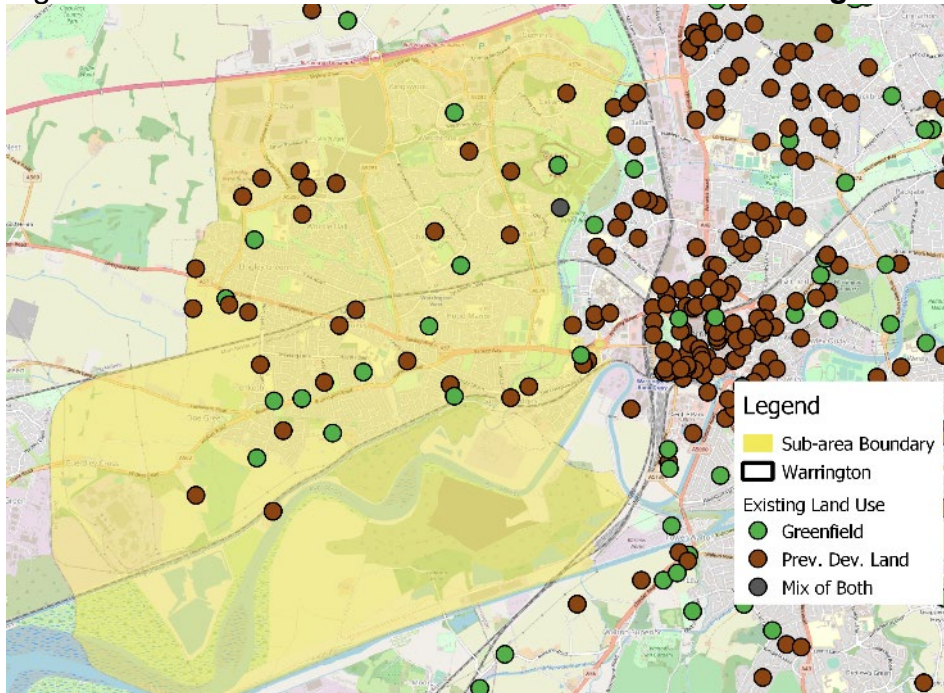
Table 117: Completions by size 2010-20

Year	1bed Apt	2 bed Apt	3 bed Apt	4 bed Apt	1 bed House	2 bed House	3 bed House	4 bed House
2010/11	6	4				36	98	61
2011/12	6	38			10	13	98	81
2012/13	17	57	2		14	29	63	73
2013/14	2	35				6	59	63
2014/15		91	1		8	12	32	42
2015/16	25	39				11	38	74
2016/17	2	44				4	42	42
2017/18	7	2					45	50
2018/19						13	133	127
2019/20								
Grand Total	65	310	3		32	124	608	613
% of Warrington	17%	26%	30%	0%	68%	19%	35%	52%

Source: Warrington Borough Council

- 1.1 The map below indicates the heavy reliance on brownfield sites in the sub-area.

Figure 13: Distribution of allocated sites – West Warrington



Source: GLH Analysis of WBC Data

- 1.2 As noted in the Table below, brownfield sites account for 77.6% of all allocated sites in the sub-area.

Table 118: Balance of brownfield and greenfield sites (# of dwellings)

Area	GF	GF/PDL	PDL	Grand Total
West Warrington	14.9%	7.5%	77.6%	100.0%
Grand Total	22.2%	2.3%	75.5%	100.0%

Source: GLH Analysis of WBC Data

- 1.3 The table below shows that the 54 sites that have been allocated in Warrington represent around 8% of all sites and are expected to generate around 6% of supply in future years.

Table 119: **Sites and Net Capacity (# of dwellings)**

	# of Sites	Sum of Net Capacity
West Warrington	54	639
Warrington	683	10,847
Sub-area as a proportion of all capacity	7.9%	5.9%

Source: GLH Analysis of WBC Data

- 1.1 House price data indicates that the sub-area has higher average house prices but lower lower quartile and median house prices than in Warrington as a whole.

Market signals

Table 120: **Median, average and lower quartile house prices**

	Median	Average	Lower Quartile
West Warrington	£195,000	£234,131	£159,000
Warrington	£195,000	£282,106	£131,850
Median	0.0%	20.5%	-17.1%

Source: Land Registry Price Paid (2020)

- 1.2 The sub-area's median income is somewhat higher than the Borough average.

Table 121: **Median income**

Area	Median income	As a % of the Borough average
West Warrington	£35,800	108.2%
Warrington	£33,100	

Source: ONS (2020)

Table 122: **Median affordability ratios**

Area	Median House Price	Median Income	Affordability Ratio
West Warrington	£195,000	£35,800	5.45
Warrington	£195,000	£33,100	5.89

Source: ONS (2020)

- 1.3 At the 2011 Census, a larger proportion of the sub-area is under-occupied as compared to Warrington.

Table 123: **Over-crowding and under-occupation**

Area	+2 or more	1	0	-1	-2 or less
West Warrington	47.20%	34.70%	16.70%	1.30%	0.20%
Warrington	39.90%	35.20%	22.50%	2.10%	0.30%
Variation	7.20%	-0.50%	-5.80%	-0.90%	-0.10%

Source: Census 2011

- 1.1 As of the 2011 Census, there is a lower proportion of vacant properties in the sub-area as compared to Warrington.

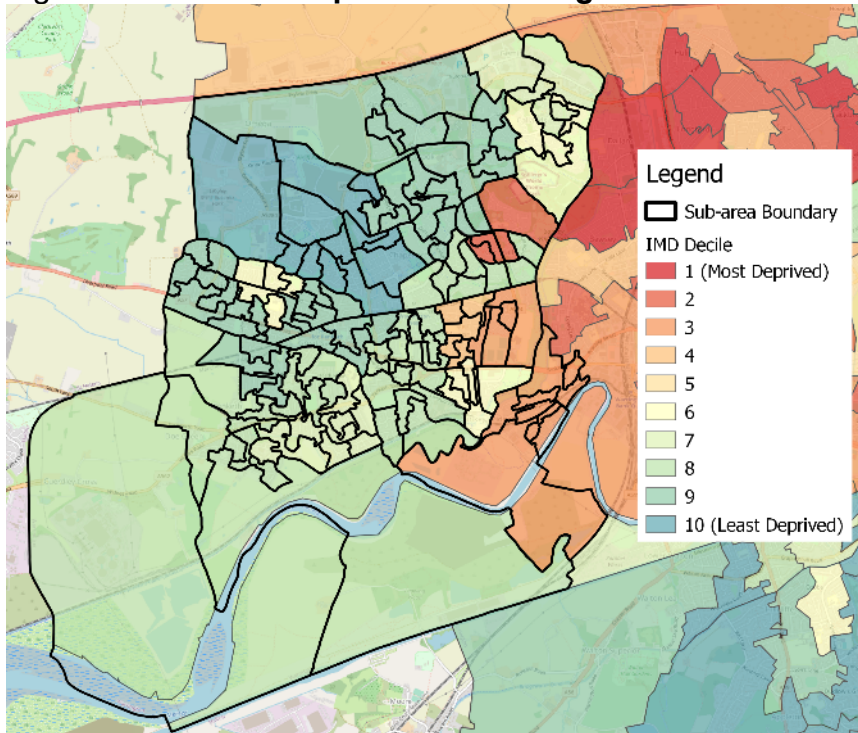
Table 124: **Vacancy**

Area	All household spaces	No usual residents	%
West Warrington	18,892	451	2.40%
Warrington	87,962	2,822	3.20%
Variation			-0.80%

Source: Census 2011

- 1.2 The map below sets out where the sub-area sits in terms of the metrics that constitute the Index of Multiple Deprivation (IMD). The sub-area is mostly non-deprived, with some areas of relative deprivation to the East.

Figure 14: **IMD Map – West Warrington**



Source: Indices of Multiple Deprivation, GLH

Conclusions – West Warrington

- The Housing Market Model concludes there is evidence to support a slightly higher proportion of 4+ bedroom market and affordable home ownership dwellings in North East Warrington compared with the Borough-level findings.
- In general, the demographic profile of West Warrington is close to that of the Borough average. That said, the sub-area has experienced the faster growth in population compared with the Borough as a whole.
- Also, in 2011, West Warrington had a higher proportion of married couples and households with children than the Borough average. Since then the area has seen a greater increase in people of parental age (aged 35-54) than Warrington as a whole.
- Given the relative affordability of median house prices, it is arguable that purpose of the sub-area is to provide larger family homes to young families.
- On the basis of the evidence gathered, there is no requirement for policy to depart from the size mix recommendations put forward by the Housing Market Model.

APPENDIX H: Inner Warrington

Housing market model

- 1.3 The table below shows that modelled size requirements for the sub-area for market properties are broadly similar to that of Warrington, with somewhat fewer 4+ bedroom properties and somewhat more 2-bedroom properties.

Table 125: **Modelled size requirement by sub-area – market housing**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Inner Warrington	4%	37%	53%	5%
Borough-wide	4%	30%	52%	14%
Variation	0%	7%	1%	-9%

Source: Housing Market Model

- 1.4 The table below shows that modelled size requirements for affordable home ownership properties in the sub-area require a greater provision of 1 and 2-bedroom homes and a lower provision of 3 and 4-bedroom homes compared to Warrington.

Table 126: **Modelled size requirement by sub-area – affordable home ownership**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Inner Warrington	20%	50%	25%	4%
Borough-wide	18%	43%	31%	8%
Variation	2%	7%	-6%	-4%

Source: Housing Market Model

- 1.5 The Housing Market Model for social/affordable rented homes for this sub-area is broadly similar to the modelled outputs for Warrington.

Table 127: **Modelled size requirement by sub-area – social/affordable rented homes**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Inner Warrington	39%	28%	29%	3%
Borough-wide	39%	27%	30%	3%
Variation	0%	1%	-1%	0%

Source: Housing Market Model

Wider evidence

- 1.6 The Housing Market Model provides a starting point for considering whether variations to the Borough recommendations as regards housing mix are appropriate within each of the sub-areas.
- 1.7 As noted in part 1, the Housing Market Model is not a perfect tool to understand demand for different types and sizes of home in that it bakes in market imbalances in the 2011 Census data.
- 1.8 This section of the report, therefore, gathers data relating to demand and supply of homes together with market signals that indicate whether furthered adjustment may be justified to the Housing Market Model recommendations in order to improve households' ability to access homes suited to their needs.

Demand

Population size

- 1.9 The sub-area's population is a large proportion of Warrington's total population and has increased significantly since 2011.

Table 128: **Population change 2011 – 19**

Area	2011	2019	Change	% change
Inner Warrington	45,190	50,422	5,232	11.6%
Warrington	202,709	210,014	7,305	3.6%
Proportion	22.3%	24.0%		

Source: ONS Population Estimates

Age structure

- 1.10 The sub-area has higher concentrations of younger people compared to Warrington on average. Also, this age group's population has increased substantially since 2011.

Table 129: **Age structure 2019**

Area	0-15	16-24	25-34	35-54	55-64	65-74	75-89	90+
Inner Warrington	20.4%	10.0%	17.9%	27.2%	10.6%	7.4%	5.9%	0.7%
Warrington	18.9%	9.3%	12.5%	27.6%	12.9%	10.3%	7.8%	0.8%
Variation	1.5%	0.7%	5.4%	-0.4%	-2.3%	-2.9%	-2.0%	-0.1%

Source: ONS Population Estimates

Table 130: **Age structure change 2011-19**

Area	0-15	16-24	25-34	35-54	55-64	65-74	75-89	90+
Inner Warrington	24.2%	-3.9%	86.3%	-12.9%	-9.4%	-33.8%	-33.1%	-8.2%
Warrington	2.3%	-11.2%	5.9%	-3.9%	11.7%	18.4%	28.8%	32.7%
Variation	21.9%	7.4%	80.3%	-8.9%	-21.1%	-52.2%	-62.0%	-40.8%

Source: ONS Population Estimates

Table 131: **Older persons population, 2019**

Area	Under 65	65-74	75-84	85+	Total	Total 65+	Total 75+
Inner Warrington	86.1%	7.4%	4.8%	1.7%	100.0%	13.9%	6.5%
Warrington	81.1%	10.3%	6.4%	2.2%	100.0%	18.9%	8.6%
Variation	5.0%	-2.9%	-1.6%	-0.5%	0.0%	-5.0%	-2.1%

Source: ONS Population Estimates

Household composition

- 1.1 In 2011, the profile of households in the sub-area shows that there are higher concentrations of lone parent and “other” (HMO) households compared to Warrington.

Table 132: **Household composition 2011**

Area	Married couple	Cohabiting couple	Lone parent	Other households	All other households	Total	Total with dependent children
Inner Warrington	10.9%	5.6%	10.1%	2.1%	71.3%	100.0%	28.7%
Warrington	17.4%	4.4%	7.3%	1.7%	69.1%	100.0%	30.9%
Variation	-6.5%	1.2%	2.8%	0.4%	2.2%	0.0%	-2.2%

Source: Census 2011

Prevalence of disability within the population

- 1.1 There is a higher level of disability in this sub-area as compared to Warrington.

Table 133: **Households and People with a Long-Term Health Problem or Disability, 2011 – sub-areas**

Area	Households Containing Someone with a Health Problem No.	Households Containing Someone with a Health Problem %	Population with a Health Problem No.	Population with a Health Problem %
Inner Warrington	7,098	34.4%	9,020	20.1%
Warrington	26,940	31.6%	34,997	17.3%
Variation		2.8%		2.8%

Source: Census 2011

Supply

The character of the current housing stock

- 1.1 The table below shows there are higher proportions of terraced homes and flats in this sub-area as compared to Warrington on the whole.

Table 134: **Type of dwellings, 2011**

Area	Detached	Semi-detached	Terraced	Flat	Caravan or other	All Types
Inner Warrington	3.9%	34.5%	41.1%	20.5%	0.0%	100.0%
Warrington	24.0%	41.3%	23.9%	10.8%	0.1%	100.0%
Variation	-20.1%	-6.8%	17.2%	9.7%	-0.1%	0.0%

Source: Census 2011

- 1.2 This is reflected in the difference in the balance of different sizes of home, with a greater emphasis on those of smaller size.

Table 135: **Dwellings by size (habitable rooms), 2011**

Area	1 room	2 rooms	3 rooms	4 rooms	5 rooms	6 rooms	7 rooms	8+ rooms
Inner Warrington	0.4%	2.9%	15.5%	21.4%	34.3%	18.0%	4.9%	2.6%
Warrington	0.2%	1.5%	8.8%	14.6%	26.9%	21.9%	11.4%	14.7%
Variation	0.2%	1.4%	6.7%	6.8%	7.4%	-3.9%	-6.5%	-12.1%

Source: Census 2011

- 1.1 The sub-area has higher concentrations of social rented and private rented property tenures as compared to Warrington and a smaller proportion of homes in owner occupation.

Table 136: **Distribution of tenures, 2011**

Area	Owned	Shared Ownership	Social Rented	Private Rented
Inner Warrington	53.9%	0.7%	25.5%	18.9%
Warrington	72.2%	0.8%	15.8%	11.3%
Variation	-18.3%	-0.1%	9.7%	7.6%

Source: Census 2011

- 1.1 Over the period from 2010-2020, the sub-area completed 2,453 dwellings. This constitutes a large proportion of housing completions out of Warrington as a whole (42.8%).

Table 137: **Completions 2010-20**

Area	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	19/20	Total
Inner Warrington	285	251	371	398	372	246	247	132	117	34	2,453
Warrington	545	620	664	713	704	615	396	377	536	559	5,729
Proportion of total	52.3%	40.5%	55.9%	55.8%	52.8%	40.0%	62.4%	35.0%	21.8%	6.1%	42.8%

Source: Warrington Borough Council

- 1.2 The table below sets out the balance of sizes of home that have been brought forward over the past ten years in the sub-area. This points to a balance between small apartments and larger homes.

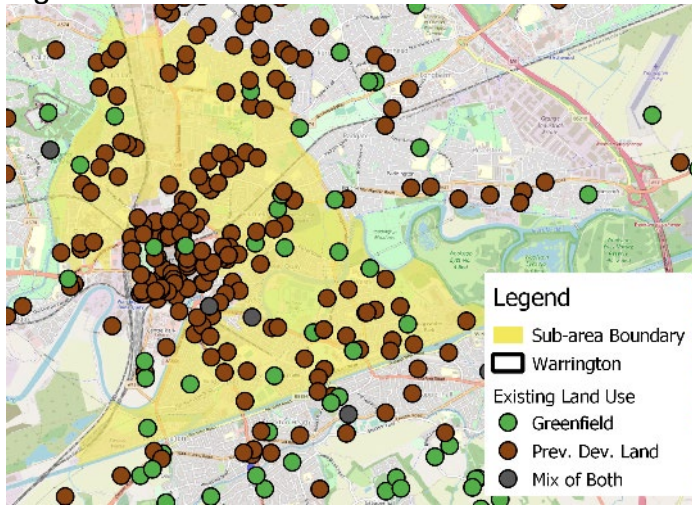
Table 138: **Completions by size 2010-20**

Year	1bed Apt	2 bed Apt	3 bed Apt	4 bed Apt	1 bed House	2 bed House	3 bed House	4 bed House
2010/11	21	67				44	124	29
2011/12	4	55				28	133	31
2012/13	14	62				55	197	43
2013/14	25	96	1		1	72	135	68
2014/15	36	121				47	112	56
2015/16	4	79				35	102	26
2016/17	8	144				22	44	29
2017/18	27	22		4		46	33	
2018/19	8	37			3	57	10	2
2019/20								
Grand Total	147	683	1	4	4	406	890	284
% of Warrington	38%	58%	10%	80%	9%	61%	52%	24%

Source: Warrington Borough Council

- 1.1 The map below indicates the heavy reliance on brownfield sites in the sub-area.

Figure 15: Distribution of allocated sites – Inner Warrington



Source: GLH Analysis of WBC Data

- 1.2 As noted in the Table below, brownfield sites account for 95% of all allocated sites in Inner Warrington.

Table 139: **Balance of brownfield and greenfield sites (# of dwellings)**

Area	GF	GF/PDL	PDL	Grand Total
Inner Warrington	0.4%	4.6%	95.0%	100.0%
Grand Total	22.2%	2.3%	75.5%	100.0%

Source: GLH Analysis of WBC Data

- 1.3 The table below shows that, the overall proportion of sites is around 16%, but this is expected to generate around 23% of new homes in future years. This suggests these sites have been identified for relatively high density development.

Table 140: **Sites and Net Capacity (# of dwellings)**

Row Labels	# of Sites	Sum of Net Capacity
Inner Warrington	112	2,538
Warrington	683	10,847
Sub-area as a proportion of all capacity	16.4%	23.4%

Source: GLH Analysis of WBC Data

- 1.1 House price data indicates that the sub-area has lower average, median and lower quartile house prices as compared to Warrington.

Market signals

- 1.2 The table below shows that Inner Warrington has lower house prices across all price points with dwellings in the median and lower quartile price range around 57% and 34% less expensive than the Borough average.

Table 141: **Median, average and lower quartile house prices**

	Median	Average	Lower Quartile
Inner Warrington	£124,000	£163,983	£98,250
Warrington	£195,000	£282,106	£131,850
Variation	-57.26%	-72.03%	-34.20%

Source: Land Registry Price Paid (2020)

- 1.3 The sub-area's median income is lower than the Borough average.

Table 142: **Median income**

Area	Median income	As a % of the Borough average
Inner Warrington	£27,600	83.4%
Warrington	£33,100	

Source: ONS (2020)

Table 143: **Median affordability ratios**

Area	Median House Price	Median Income	Affordability Ratio
Inner Warrington	£124,000	£27,600	4.49
Warrington	£195,000	£33,100	5.89

Source: ONS (2020)

- 1.4 At the 2011 Census, a smaller proportion of the sub-area is under-occupied as compared to Warrington.

Table 144: **Over-crowding and under-occupation**

Area	+2 or more	1	0	-1	-2 or less
Inner Warrington	23.20%	38.50%	34.10%	3.80%	0.40%
Warrington	39.90%	35.20%	22.50%	2.10%	0.30%

Variation	-16.70%	3.30%	11.70%	1.60%	0.20%
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Source: Census 2011

1.5 As of the 2011 Census, there is a higher proportion of vacant properties in the sub-area as compared to Warrington.

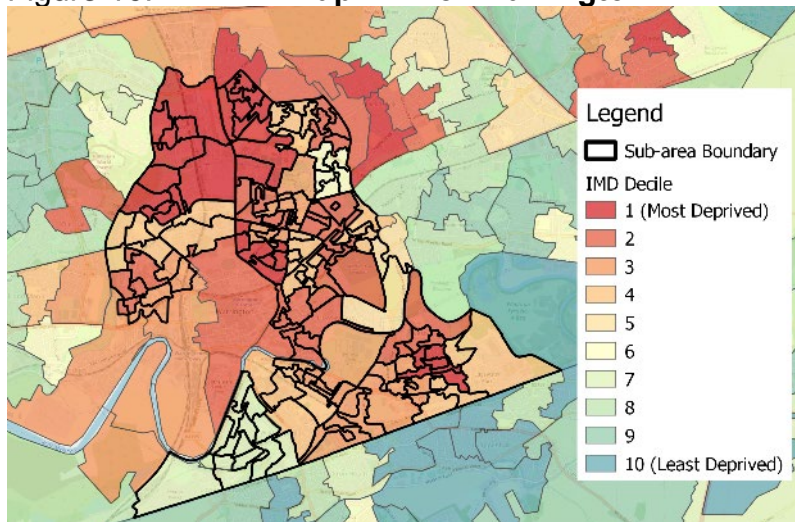
Table 145: **Vacancy**

Area	All household spaces	No usual residents	%
Inner Warrington	21,489	881	4.10%
Warrington	87,962	2,822	3.20%
Variation			0.90%

Source: Census 2011

1.6 The map below sets out where the sub-area sits in terms of the metrics that constitute the Index of Multiple Deprivation (IMD). The sub-area is considerably deprived.

Figure 16: **IMD Map – Inner Warrington**



Source: Indices of Multiple Deprivation, GLH

Conclusions – Inner Warrington

- The Housing Market Model concludes there is evidence to support a reduced proportion of 4+ bedroom market and a higher proportion of 1 and 2 bedroom affordable home ownership units in Inner Warrington compared with the

Borough as a whole.

- It is worth noting that inner Warrington has experienced the faster growth in population compared with the Borough average and represents around a quarter of the Borough's total population.
- Inner Warrington has seen an increase in the 25-34 age group over the period 2011-19 that exceeds that of the population as a whole by around 80%.
- Inner Warrington has house prices that are substantially lower than the Borough average across all price-points with dwellings in the median and lower quartile price range around 57% and 34% less expensive than the Borough average.
- As a result, the median affordability ratio is less than the borough figure by 31% (4.49 v 5.89).
- On the basis of the evidence gathered, there is no requirement for policy to depart from the size mix recommendations put forward by the Housing Market Model.

APPENDIX I: Lymm

Housing market model

- 1.7 The table below shows that modelled size requirements for market housing for the sub-area are broadly similar to that of Warrington, with somewhat more 4+ bedroom homes.

Table 146: **Modelled size requirement by sub-area – market housing**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Lymm	4%	29%	47%	20%
Borough-wide	4%	30%	52%	14%
Variation	0%	-1%	-5%	6%

Source: Housing Market Model

- 1.8 The table below shows that modelled size requirements for affordable home ownership in the sub-area are broadly similar to that of Warrington, albeit with a slightly higher provision of 3 and 4-bedroom homes.

Table 147: **Modelled size requirement by sub-area – affordable home ownership**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Lymm	16%	41%	33%	10%
Borough-wide	18%	43%	31%	8%
Variation	-2%	-2%	2%	2%

Source: Housing Market Model

- 1.9 The Housing Market Model for social/affordable rented homes for this sub-area is broadly similar to the modelled outputs for Warrington, but with a somewhat higher provision of 2-bedroom homes.

Table 148: **Modelled size requirement by sub-area – social/affordable rented homes**

	1-bedroom	2-bedrooms	3-bedrooms	4+-bedrooms
Lymm	37%	32%	29%	2%
Borough-wide	39%	27%	30%	3%
Variation	-2%	5%	-1%	-1%

Source: Housing Market Model

Wider evidence

- 1.10 The Housing Market Model provides a starting point for considering whether variations to the Borough recommendations as regards housing mix are appropriate within each of the sub-areas.
- 1.11 As noted in part 1, the Housing Market Model is not a perfect tool to understand demand for different types and sizes of home in that it bakes in market imbalances in the 2011 Census data.
- 1.12 This section of the report, therefore, gathers data relating to demand and supply of homes together with market signals that indicate whether furthered adjustment may be justified to the Housing Market Area recommendations in order to improve households' ability to access homes suited to their needs.

Demand

Population size

- 1.13 The sub-area's population is a relatively small proportion of Warrington's total population. While it has increased over the period since 2011 growth has not equalled that of Warrington as a whole.

Table 149: **Population change 2011 – 19**

Area	2011	2019	Change	% change
Lymm	12,379	12,709	330	2.7%
Warrington	202,709	210,014	7,305	3.6%
Proportion	6.1%	6.1%		

Source: ONS Population Estimates

Age structure

- 1.14 The sub-area has slightly higher concentrations of older people compared to Warrington on average. Over the period since 2011 this age group has increased as

a proportion of the population of Lymm substantially. This growth exceeds a similar trend in Warrington as a whole.

Table 150: **Age structure 2019**

Area	0-15	16-24	25-34	35-54	55-64	65-74	75-89	90+
Lymm	20.9%	7.9%	7.6%	29.2%	12.8%	11.4%	9.4%	0.9%
Warrington	18.9%	9.3%	12.5%	27.6%	12.9%	10.3%	7.8%	0.8%
Variation	2.0%	-1.4%	-4.9%	1.6%	-0.1%	1.2%	1.5%	0.1%

Source: ONS Population Estimates

Table 151: **Age structure change 2011-19**

Area	0-15	16-24	25-34	35-54	55-64	65-74	75-89	90+
Lymm	3.7%	-21.1%	-36.8%	-7.9%	6.8%	31.5%	85.7%	78.3%
Warrington	2.3%	-11.2%	5.9%	-3.9%	11.7%	18.4%	28.8%	32.7%
Variation	1.4%	-9.9%	-42.7%	-4.0%	-4.9%	13.1%	56.9%	45.7%

Source: ONS Population Estimates

Table 152: **Older persons population, 2019**

Area	Under 65	65-74	75-84	85+	Total	Total 65+	Total 75+
Lymm	78.3%	11.4%	7.8%	2.5%	100.0%	21.7%	10.3%
Warrington	81.1%	10.3%	6.4%	2.2%	100.0%	18.9%	8.6%
Variation	-2.8%	1.1%	1.4%	0.3%	0.0%	2.8%	1.7%

Source: ONS Population Estimates

Household composition

- 1.1 In 2011, the profile of households in the sub-area shows there are higher concentrations of married couples and a greater proportion of households with children compared to Warrington.

Table 153: **Household composition 2011**

Area	Married couple	Cohabiting couple	Lone parent	Other households	All other households	Total	Total with dependent children
Lymm	22.6%	2.9%	5.9%	1.4%	67.2%	100.0%	32.8%
Warrington	17.4%	4.4%	7.3%	1.7%	69.1%	100.0%	30.9%
Variation	5.2%	-1.5%	-1.4%	-0.3%	-1.9%	0.0%	1.9%

Source: Census 2011

Prevalence of disability within the population

- 1.1 The table below shows there is a significantly higher level of disability in this sub-area as compared to Warrington.

Table 154: **Households and People with a Long-Term Health Problem or Disability, 2011 – sub-areas**

Area	Households Containing Someone with a Health Problem No.	Households Containing Someone with a Health Problem %	Population with a Health Problem No.	Population with a Health Problem %
Lymm	1,333	25.8%	1,669	13.5%
Warrington	26,940	31.6%	34,997	17.3%
Variation		-5.8%		-3.8%

Source: Census 2011

Supply

The character of the current housing stock

- 1.1 There is a higher proportion of detached homes in Lymm and fewer smaller types of house, terraced homes in particular, compared to Warrington as a whole.

Table 155: **Type of dwellings, 2011**

Area	Detached	Semi-detached	Terraced	Flat	Caravan or other	All Types
Lymm	30.4%	39.7%	18.9%	11.0%	0.1%	100.0%
Warrington	24.0%	41.3%	23.9%	10.8%	0.1%	100.0%
Variation	6.4%	-1.6%	-5.0%	0.2%	0.0%	0.0%

Source: Census 2011

- 1.2 This is reflected in the difference in the balance of different sizes of home, with a greater emphasis on those of the largest size.

Table 156: **Dwellings by size (habitable rooms), 2011**

Area	1 room	2 rooms	3 rooms	4 rooms	5 rooms	6 rooms	7 rooms	8+ rooms
Lymm	0.1%	1.1%	5.4%	13.5%	19.0%	20.6%	15.4%	24.9%
Warrington	0.2%	1.5%	8.8%	14.6%	26.9%	21.9%	11.4%	14.7%
Variation	-0.1%	-0.4%	-3.4%	-1.1%	-7.9%	-1.3%	4.0%	10.2%

Source: Census 2011

- 1.1 The sub-area has higher concentrations of owned and shared ownership property tenures as compared to Warrington.

Table 157: **Distribution of tenures, 2011**

Area	Owned	Shared Ownership	Social Rented	Private Rented
Lymm	78.80%	0.90%	7.50%	12.00%
Warrington	72.20%	0.80%	15.80%	11.30%
Variation	6.60%	0.10%	-8.30%	0.70%

Source: Census 2011

- 1.2 Lymm has seen 166 new homes built over the period 2010/11 to 2019/20. This constitutes around 3% of all homes delivered in the Borough over this period.

Table 158: **Completions 2010-20**

Area	10/11	11/12	12/13	13/14	14/15	15/16	16/17	17/18	18/19	19/20	Total
Lymm	18	46	4	18	28	8	6	25	4	9	166
Warrington	545	620	664	713	704	615	396	377	536	559	5,729
Proportion of total	3.3%	7.4%	0.6%	2.5%	4.0%	1.3%	1.5%	6.6%	0.7%	1.6%	2.9%

Source: Warrington Borough Council

- 1.3 The table below sets out the balance of sizes of home that have been brought forward over the past ten years in the sub-area. While the majority of homes that have been built are 3 and 4 bedroom houses, 32% of delivery (51 dwellings) have been 2 bedroom flats.

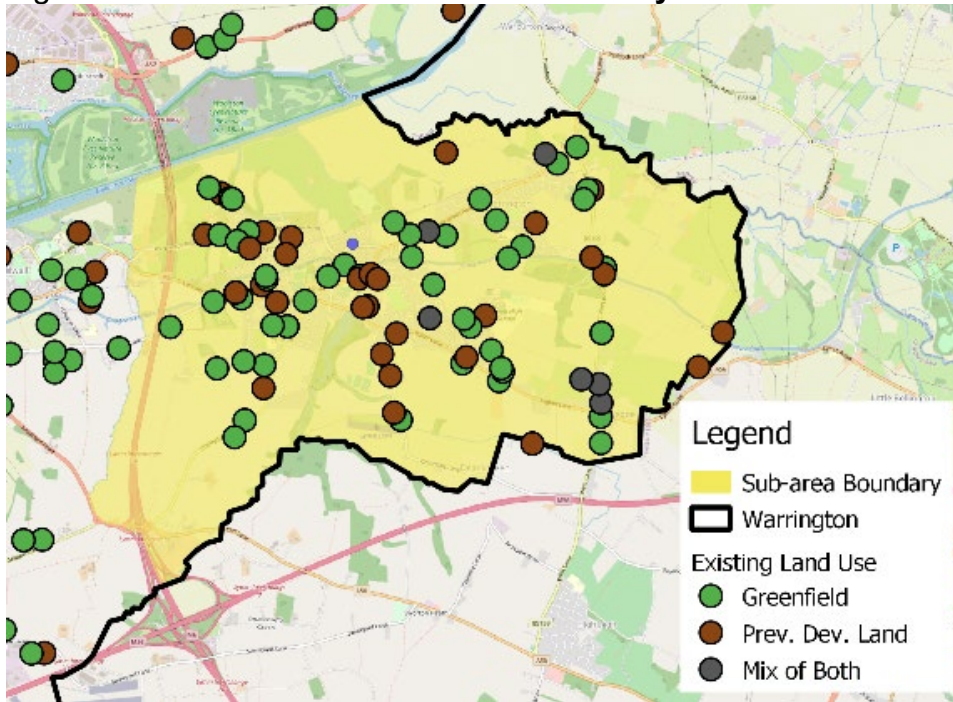
Table 159: **Completions by size 2010-20**

Year	1bed Apt	2 bed Apt	3 bed Apt	4 bed Apt	1 bed House	2 bed House	3 bed House	4 bed House
2010/11							2	16
2011/12		38					2	6
2012/13		1					2	1
2013/14						3	13	2
2014/15		8					20	
2015/16						1	3	4
2016/17		4	1					1
2017/18						3	14	8
2018/19								4
2019/20								
Grand Total		51	1			7	56	42
% of Warrington	0%	4%	10%	0%	0%	1%	3%	4%

Source: Warrington Borough Council

- 1.1 The map below indicates a balance of both brownfield and greenfield sites in the sub-area.

Figure 17: Distribution of allocated sites - Lymm



Source: GLH Analysis of WBC Data

- 1.2 As noted in the Table below, sites in Lymm reflect a balance between greenfield and previously developed sites.

Table 160: **Balance of brownfield and greenfield sites (# of dwellings)**

Area	GF	GF/PDL	PDL	Grand Total
Lymm	23.0%	33.5%	43.5%	100.0%
Warrington	22.2%	2.3%	75.5%	100.0%

Source: GLH Analysis of WBC Data

- 1.3 The table below shows that, while Lymm accounts for around 14% of all sites in the Borough, these are expected to generate only 2% of net capacity. This indicates they are very small sites yielding, on average, around 2 homes per site.

Table 161: **Sites and Net Capacity (# of dwellings)**

Row Labels	# of Sites	Sum of Net Capacity
Lymm	95	221
Warrington	683	10,847
Sub-area as a proportion of all capacity	13.9%	2.0%

Source: GLH Analysis of WBC Data

Market signals

- 1.1 House price data indicates that the sub-area has substantially higher average, median and lower quartile house prices as compared to Warrington.

Table 162: **Median, average and lower quartile house prices**

	Median	Average	Lower Quartile
Lymm	£322,500	£389,460	£237,175
Warrington	£195,000	£282,106	£131,850
Variation	65.4%	38.1%	79.9%

Source: Land Registry Price Paid (2020)

- 1.2 The sub-area's median income is notably higher than the Borough average.

Table 163: **Median income**

Area	Median income	As a % of the Borough average
Lymm	£40,100	121.1%
Warrington	£33,100	

Source: ONS (2020)

Table 164: **Median affordability ratios**

Area	Median House Price	Median Income	Affordability Ratio
Lymm	£322,500	£40,100	8.04
Warrington	£195,000	£33,100	5.89

Source: ONS (2020)

- 1.3 At the 2011 Census, a larger proportion of the sub-area is under-occupied as compared to Warrington.

Table 165: **Over-crowding and under-occupation**

Area	+2 or more	1	0	-1	-2 or less
Lymm	49.8%	34.8%	13.8%	1.4%	0.1%
Warrington	39.9%	35.2%	22.5%	2.1%	0.3%
Variation	9.9%	-0.4%	-8.6%	-0.8%	-0.2%

Source: Census 2011

- 1.4 As of the 2011 Census, there is a similar proportion of vacant properties in the sub-area as compared to Warrington.

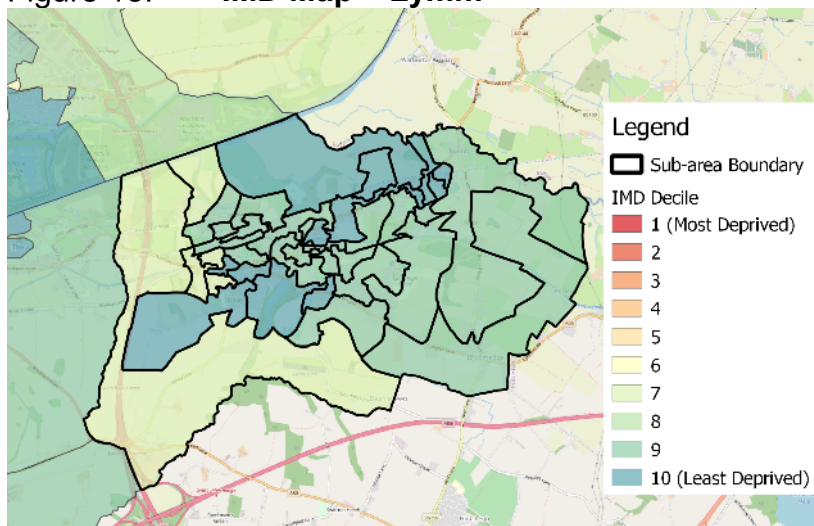
Table 166: **Vacancy**

Area	All household spaces	No usual residents	%
Lymm	5,341	170	3.20%
Warrington	87,962	2,822	3.20%
Variation			0.00%

Source: Census 2011

- 1.5 The map below sets out where the sub-area sits in terms of the metrics that constitute the Index of Multiple Deprivation (IMD). The sub-area contains both has very little deprivation

Figure 18: **IMD Map – Lymm**



Source: Indices of Multiple Deprivation, GLH

Conclusions - Lymm

- The Housing Market Model concludes there is evidence to support a higher proportion of 4+ bedroom market and affordable home ownership dwellings in Lymm compared with the Borough-level findings. Also, a greater proportion of 2 bedroom affordable rented units.
- Lymm has experienced an influx of older people in the period since 2011.
- That said, there are higher concentrations of married couples and a greater proportion of households with children compared to the Borough as a whole.
- The housing stock is dominated by larger homes of 6 habitable rooms or more. Dwellings also tend to be in owner-occupation.
- House prices are higher in Lymm than the Borough average across all price points. Despite the variation in median income, the Median Affordability Ratio is 8.04, around 37% higher than the Borough MAR of 5.89.
- As with other more affluent parts of Warrington, under-occupation is widespread in Lymm and exceeds the Borough average by around 10%.
- While there has been limited development in Lymm over the past ten years, this has struck a balance between 2 bedroom flats and houses of 3 and 4 bedrooms. This is not far off from the size mix recommended by the Housing Market Model.
- On the basis of the evidence gathered, there is no requirement for policy to depart from the size mix recommendations put forward by the Housing Market Model.