

An evidence-led housing strategy:
The current market, future dwelling requirements and
housing strategy priorities

City of Wolverhampton Council

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1. Introduction

- 1.1 As part of the evidence base to support the development of a 5-year housing strategy in Wolverhampton, this report considers the current drivers and position of the housing market as well as future dwelling requirements.
- 1.2 It focuses on a number of specific elements within the market which include:
- The strategic context
 - Economy
 - Urban form, social profile and neighbourhood function
 - Population and household change
 - Housing market performance
 - Future dwelling requirements
 - Affordability
 - Conclusions and priorities for the housing strategy
- 3.1 The report includes the latest local authority-based data for Wolverhampton and the other three Black Country districts, adjacent South Staffordshire, Birmingham and the West Midlands region.
- 3.1 A significant number of maps are included, focussed on either Wolverhampton or the sub-region depending on the indicator. These map the data at the smallest appropriate geography, usually LSOA (broadly a locality or neighbourhood-sized area) or MSOA, another ONS category that combines LSOAs. For Wolverhampton and immediately adjacent areas, the local data for non-residential land in 2018 is masked; for the sub-region, non-urban areas as defined by ONS in 2011 are masked. This is done because the focus is on housing in urban environments—and large rural or industrial LSOA with small or dispersed populations can appear misleading in indicators such as multiple deprivation.

2. The Strategic Context

- 2.1 A detailed policy and strategy review have been undertaken using publicly available documents. The detail is contained in appendix A and summarised within this section.

The National agenda

- 2.2 Government's current priority focus around increasing housing supply and access to home ownership as outlined in the Housing White Paper, *Fixing our broken housing market* published in February 2017. The primary target is to support the provision of 300,000 new homes per year by the mid-2020s.
- 2.3 There are a number of priority locations outlined in the Homes England Strategic Plan 2018/19 *Making Homes Happen* which explains its offer of expert support for priority locations to create and deliver more ambitious plans to build homes, especially for home ownership. This focuses on making more land available, bringing more funding to support infrastructure, developing modern methods of construction and supporting more smaller builders into the market and promote better design and higher quality homes.
- 2.4 Since the *Grenfell Tower Fire* tragedy in June 2017, there has been a new focus on safety and listening to residents. The *Social Housing Green Paper*, published in August 2018, started a 'national conversation' on the issues raised by over 8,000 residents and on the role of social housing.
- 2.5 The *Homelessness Reduction Act 2017* now requires councils to engage and work with households threatened with homelessness 56 days in advance of the date on which they are expected to become homeless (28 days earlier than previously). It requires tailored advisory services for specified vulnerable groups. The *Children and Social Work Act 2017* goes further by introducing a new duty on councils to publish a local offer for care leavers with regards to accommodation and wider support.
- 2.6 *Welfare Reforms* continue to present challenges for residents, the Council and Registered Providers. Changes that have already been implemented include: a reduction in the Benefit Cap to £20,000 for families and £13,400 a year for single people, the Under-Occupancy Charge (Bedroom Tax) that limits the Housing Benefit entitlement for claimants who are deemed to have one or more spare rooms. The Shared Accommodation Rate now applies for people under the age of 35. Universal Credit is currently being rolled out in Wolverhampton rate. Some minor changes were made to Universal Credit in the Autumn Statement 2017 to help soften the impact on claimants and a further £1.7 billion was announced in the Autumn Budget 2018 to increase work allowances and provide extra help for people moving from existing benefits to UC. Further changes have recently been made by the Secretary of State to address some of the design flaws of Universal Credit.

The West Midlands Combined Authority

- 2.7 Housing and land use is a key WMCA priority with an Investment Prospectus setting out up to £10bn in development schemes (<https://www.wmca.org.uk/media/2071/wmca-investment-prospectus-march-2018.pdf>). A £350m Housing Deal has also been made with the government.
- 2.8 The [WMCA Strategic Economic Plan](https://www.wmca.org.uk/media/1382/full-sep-document.pdf) (<https://www.wmca.org.uk/media/1382/full-sep-document.pdf>) anticipates 500,000 new jobs will be created by the year 2030. To accommodate this growth, it has been estimated that land for some 50,000 new houses will need to be identified across the conurbation.
- 2.9 The plan recognises the challenge of building homes. In order to accelerate house building, a programme of activity to bring forward development sites is proposed, including land assembly and remediation work. In addition, WMCA intend to take a new approach to house building, exploring ways in which it can exploit its scale and potential to work with the house building industry. It hopes to develop a business model which enhances the viability of housebuilding in the area.
- 2.10 Innovation and skills ambitions are supported by investment into the Springfield Campus in Wolverhampton and creation of Europe's largest specialist construction and built environment campus.

The Black Country Core Strategy (BCCS)

- 2.11 The Core Strategy provides a clear spatial or locational dimension to the regeneration and renaissance of the area, addressing its economic, transportation, social infrastructure and environmental needs whilst reducing its carbon footprint and helping to tackle climate change.
- 2.12 The Black County Core Strategy set a target of around 63,000 additional homes (net) to be delivered over the period 2006-26 to accommodate its growing population. The target for Wolverhampton is 13,400 homes or 670 homes each year. 5,640 homes had been built up to 2018, and land is available for another 9,000 homes. This is 16% above the target, however much of the land that is available requires reclamation to make it ready for development and is located in areas of low market demand; this adds to the costs of developing new homes and in many cases, the sales value of homes may not be high enough to make them attractive to developers. Our plan is to tackle these issues directly, innovatively and in partnership with developers.

Affordable Housing

- 2.13 The Black Country Core Strategy aims to provide a minimum 550 new affordable homes each year, in partnership with developers and Homes England. There has been some success in delivering against this target, however delivery in Wolverhampton has been limited by the availability of grant funding and low levels of affordable housing secured through S106 agreements due to the poor viability of many developments.

- 2.14 As a partner, Wolverhampton will continue to seek to secure 25% affordable housing on all sites of 10 homes or more where this is financially viable, in line with current local and national policy.

Issues and Options Report (consultation ended 08/09/2017)

<https://blackcountry.jdi-consult.net/localplan/readdoc.php?docid=6>

- 2.15 A new strategy is planned to be in place by Autumn 2021. Initial consultation has now taken place through an Issues and Options Report. This clearly recognises that further land will be needed, beyond the existing spatial strategy, to meet all of the Black Country's growth needs. It is estimated that further land will be required to provide 22-25,000 new homes and up to 300 ha of new employment land.

Local policy context

- 2.16 Wolverhampton is a City to the north west of the West Midlands conurbation (see Map 1) and is estimated to be home to approximately 249,900 people. The countryside of South Staffordshire is to the north and west of the city, with the urban area to the south and east. Wolverhampton is the only city in the Black Country and has an important role to play in the future direction of the conurbation. The administrative area includes the City Centre and the Town Centres of Bilston and Wednesfield Village. The City also has good transport links with the sub-region and the rest of the UK, with the M54 link to the M6 motorway and good public transport links with the Metro, cross country railway links, and strategic bus routes

Wolverhampton City Strategic Centre

- 2.17 By 2026 Wolverhampton will be served by an established, confident City Centre with a wide variety of quality shops and cultural attractions, 21st century offices, urban living and a city-scale public transport interchange. A modern public realm network and vibrant Canalside quarter will have made the compact City Centre attractive to walkers and cyclists. Historic areas will provide an enhanced, well maintained built environment which will be attractive to visitors, commercial businesses and residents.

Area Action Plans

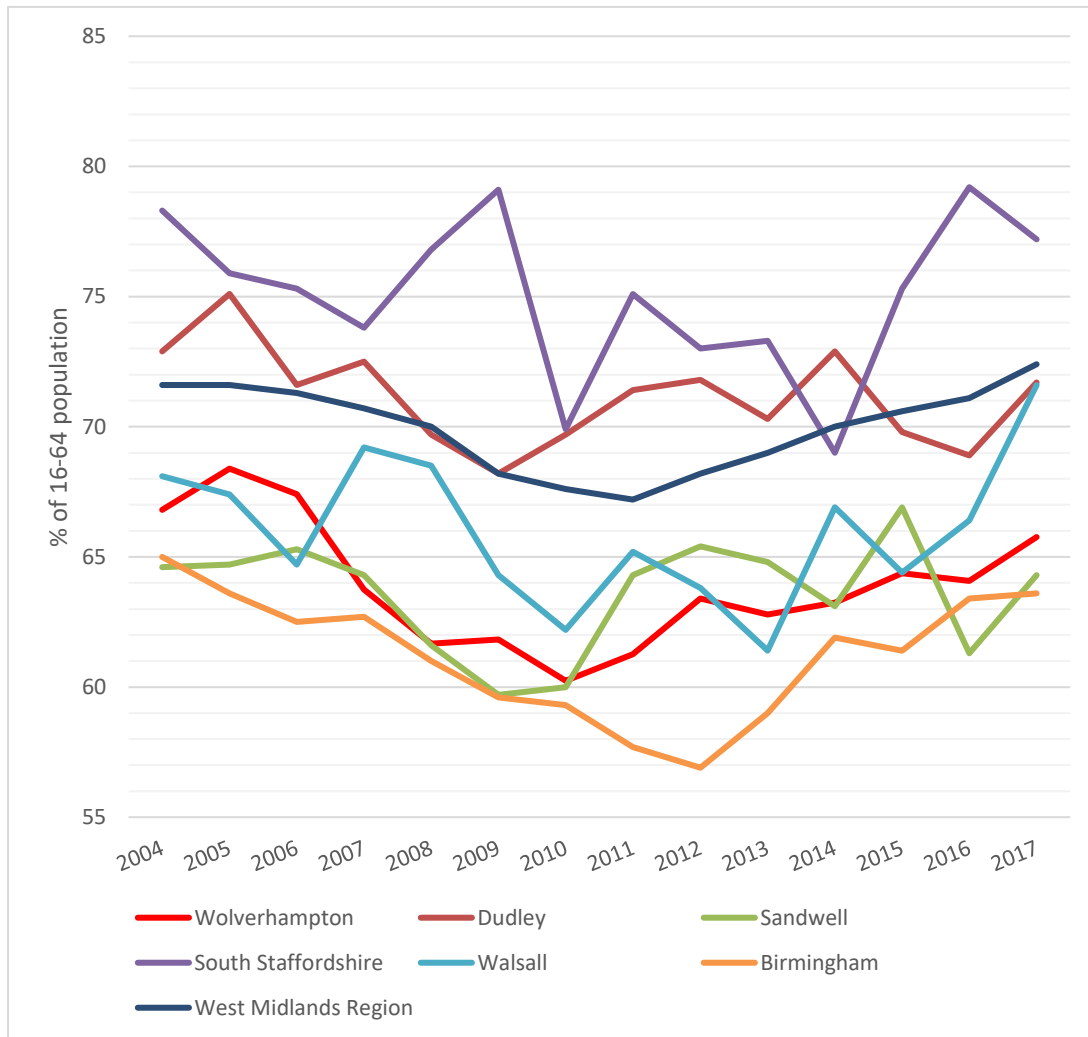
- 2.18 There are 3 Area Action Plans being prepared in Wolverhampton for parts of the city that will be subject to significant change up to 2026.
- 2.19 The Area Action Plans will guide the transformation of these areas and provide detailed policies and proposals to deliver the Black Country Core Strategy at a local level. The area action plans will, when adopted, form part of the Development Plan for Wolverhampton, and will replace some allocations and policies in the Unitary Development Plan. These are the Wolverhampton City Centre Action Plan delivering new homes, leisure, retail and commercial space. **The Stafford Road Area Action Plan** delivering at least 450 new homes together with 780 homes on existing housing

commitment sites and the **Bilston Corridor Area Action Plan** providing at least 1,445 new homes, together with 1,155 homes on existing housing commitment sites.

3. Economy

- 3.1 Wolverhampton has a £4.6bn economy, with around 7,500 businesses providing 102,000 jobs (Table 1). GVA per head is the highest in the Black Country and this productivity is reflected in work place weekly wage rates. The city currently has £3.7bn investment on-site or planned, including the Westside development, a new railway station and wider city centre projects, and new housing in Bilston. The i54 employment site has attracted Jaguar Land Rover, Moog, Eurofins, ISP, ERA and Tentec providing over 4,000 jobs at a well-connected location benefiting from Black Country Enterprise Zone status.
- 3.2 Like other medium-sized cities in conurbations in the Midlands and the North of England, Wolverhampton has nevertheless seen poor recent GVA growth and job creation over the last two decades. In Wolverhampton this employment weakness has extended to the city centre which has also experienced employment loss. The City has been more reliant on manufacturing and public sector employment than the nation as a whole and due to its legacy of vulnerable industrial concentrations it now has, it has a relatively low job density and a persistently low employment rate, which at 65.8% is the second lowest in the region. Given the economic restructuring which Wolverhampton has experienced in the 21st Century, unemployment and worklessness also remain relatively high, despite a recovery in employment following the recession of 2008/9 (Figure 1). Hourly wages for residents are lower than the city workforce, with commuters filling some better-paid jobs in an economy which produces the highest workplace earnings in the Black Country.
- 3.3 Recent employment forecasts used for the Black Country/South Staffordshire SHMA indicate that jobs growth is projected to be either very low (Oxford Economics) or similar to past trends (Experian) with any Brexit scenario a further risk (Table 2). These forecasts do not however take into account the developing public policy framework in the City which designed to foster growth and remove the barriers which are creating market failure in the land, housing and labour markets. The City Council and other public sector agencies are seeking to adopt an entrepreneurial approach to fostering local growth and supporting the private sector through a transitional period in the city's economic history. The success of this approach is dependent upon public investment raised locally and nationally and is justified by efficient and effective delivery. This delivery is evident in housing in Wolverhampton where MCHLG monitoring of new housing supply over a three-year period (2015/16-2017/18) shows that 1,974 dwellings were completed, this being 111% of target, much of this new build was supporting mixed use developments and new employment opportunities in long term investment/development corridors.
- 3.4 The pattern of employment and skills is highly polarised within Wolverhampton (Figure 2 to Figure 3). The employment rate falls below 50% in the central areas of the city, part of an arc of labour market exclusion stretching from the Black Country. However, Figure 6 shows Wolverhampton has avoided the sharp localised recent employment falls seen on the Sandwell-Walsall boundary and in North-West Birmingham. Nevertheless, income levels remain very low in areas with poor skill levels and depressed activity and this in turn impacts on the performance of the housing market in these neighbourhoods.

Figure 1 Employment Rate 2004 to 2017



Source: ONS annual population survey via NOMIS. © Crown copyright: Adapted data from ONS under the Open Government Licence v.3.0.

Indicator	Wolverhampton	Dudley	Sandwell	South Staffordshire	Walsall	Birmingham	West Midlands Region
Total GVA 2016 (£) Millions	4,603	4,954	5,855	1,884	4,708	25,720	128,360
GVA per head 2016 (£) Thousands	17,935	15,597	18,142	16,072	16,893	22,871	22,098
Change in GVA 2007-16 (%)	10.7	5.2	18.9	27.2	29.4	27.6	30.1
Change in GVA per head 2007-16 (%)	5.2	2.2	8.6	9.9	21.2	16.7	22.1
Total workplace employment 2017	102,000	121,000	136,000	37,000	113,000	527,000	2,664,000
Change in employment 2015-17	0.0	5.2	1.5	2.8	5.6	4.6	4.6
Number of businesses 2018	7,545	9,490	8,775	4,165	7,525	34,565	212,505
Manufacturing jobs 2017 (%)	12.7	14.0	15.4	13.5	11.5	7.4	11.3
Public sector jobs 2017 (%)	22.0	19.6	15.6	10.3	18.6	22.6	16.9
Jobs density 2017 (number per 16-64 population)	0.69	0.69	0.72	0.63	0.73	0.81	0.82
Employment rate 2017 (% of 16-64 population)	65.8	71.7	64.3	77.2	71.6	63.6	72.4
Unemployment rate 2017-18 (% of 16-64 population)	6.7	5.4	6.3	2.8	6.7	6.7	4.5
Workless households 2017 (%)	22.5	17.7	22.8	...	18.5	17.8	14.0
Claimants count December 2018 (% of 16-64 population)	5.3	4.0	3.5	1.4	3.3	5.5	3.0
Level 4 qualifications and above 2017 (% of 16+ population)	26.2	24.0	21.3	32.4	27.2	31.4	31.8
No qualifications 2017 (% 16+ population)	15.6	13.3	21.0	8.1	11.9	12.6	10.4

Source: Regional gross value added (balanced) reference tables; Regional Gross Value Added (Balanced) by Local Authority in the UK; Business Register and Employment Survey: open access; Business Register and Employment Survey public/private sector : open access; UK Business Counts - enterprises by industry and employment size band; ONS annual population survey via NOMIS. © Crown copyright: Adapted data from ONS under the Open Government Licence v.3.0.

Table 2 Black Country and South Staffordshire Economic Forecasts 2014 to 2032								
	Oxford Economics			Experian				
	Workforce jobs			Workforce jobs			Unemployment rate (% ILO)	
	2015	2030	% change 2015-30	2014	2032	% change 2015-30	2014	2032
Wolverhampton	128,650	128,450	-0.2	124,500	135,700	9.0	11.3	7.7
Dudley	131,640	130,160	-1.1	126,100	135,500	7.5	7.9	5.3
Sandwell	142,980	143,340	0.3	143,900	157,900	9.7	10.4	8.3
South Staffordshire	37,720	39,150	3.8	35,300	38,500	9.1	4.7	3.3
Walsall	116,080	116,460	0.3	111,300	122,200	9.8	9.3	5.8

Source: Peter Brett Associates, 'Black Country and South Staffordshire Strategic Housing Market Assessment', [consultancy report], London: Peter Brett Associates LLP, 2017, 58-61.

Figure 2 Higher-level Qualifications 2011

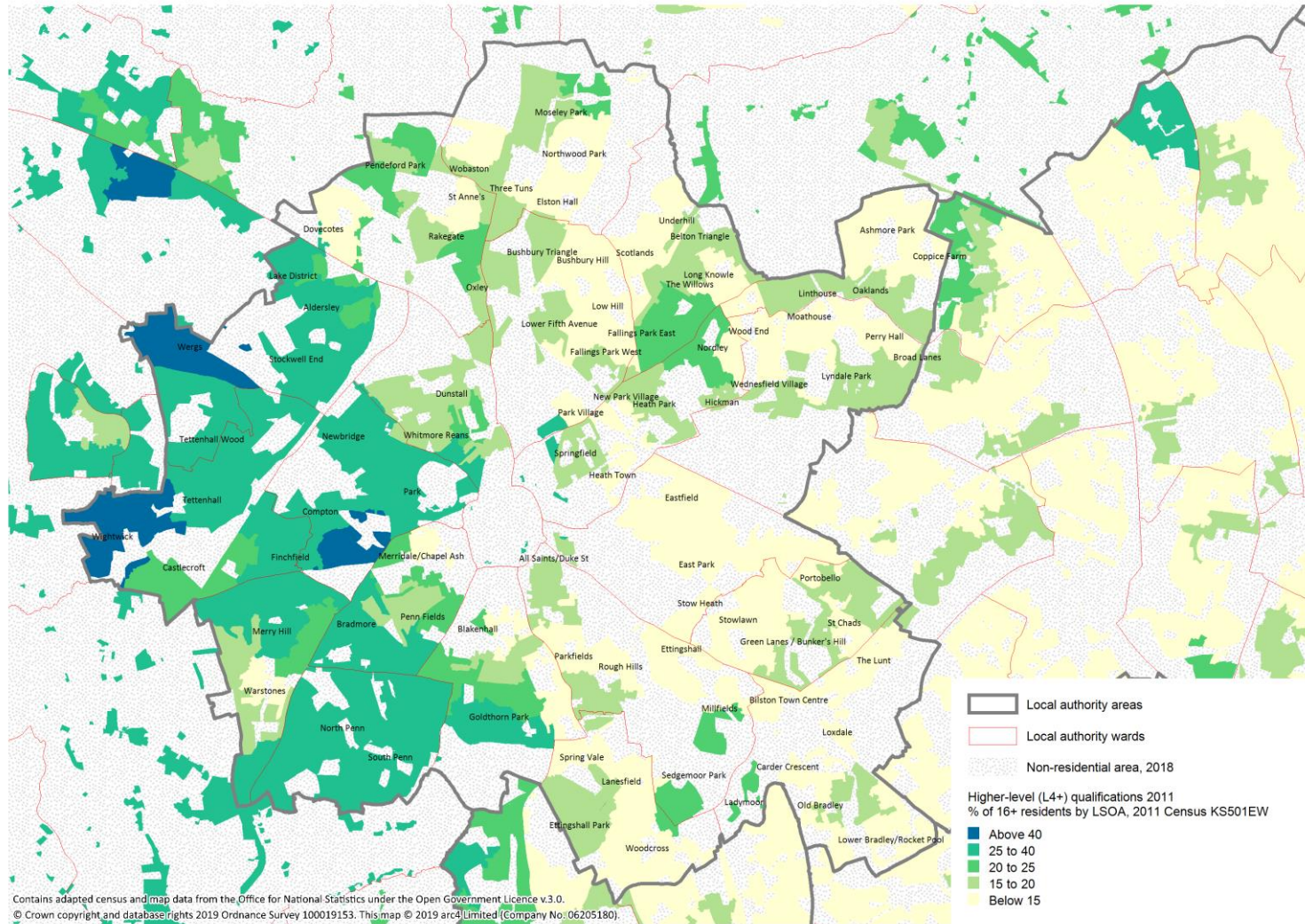


Figure 3 No Qualifications 2011

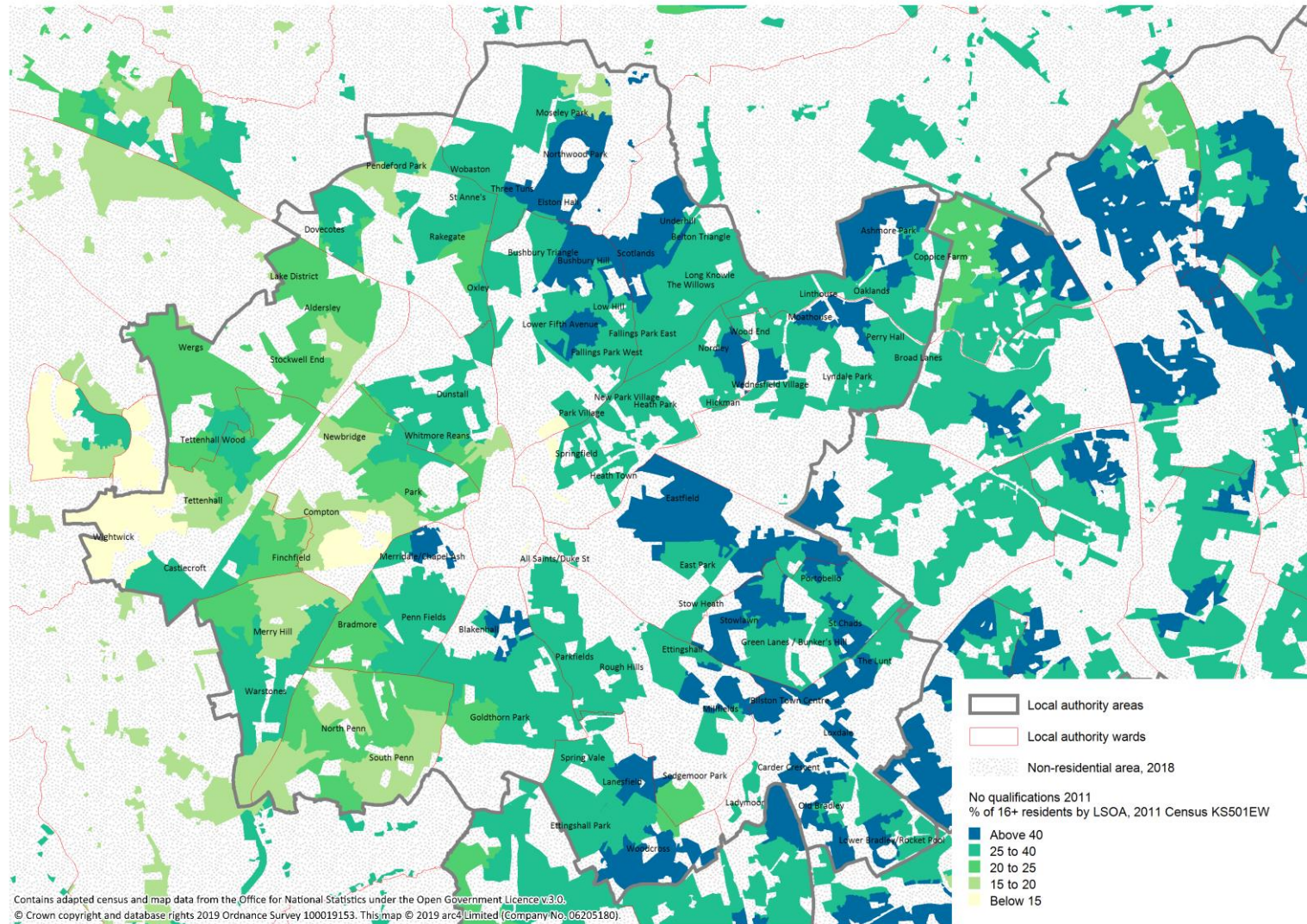


Figure 4 Employment Rate 2011

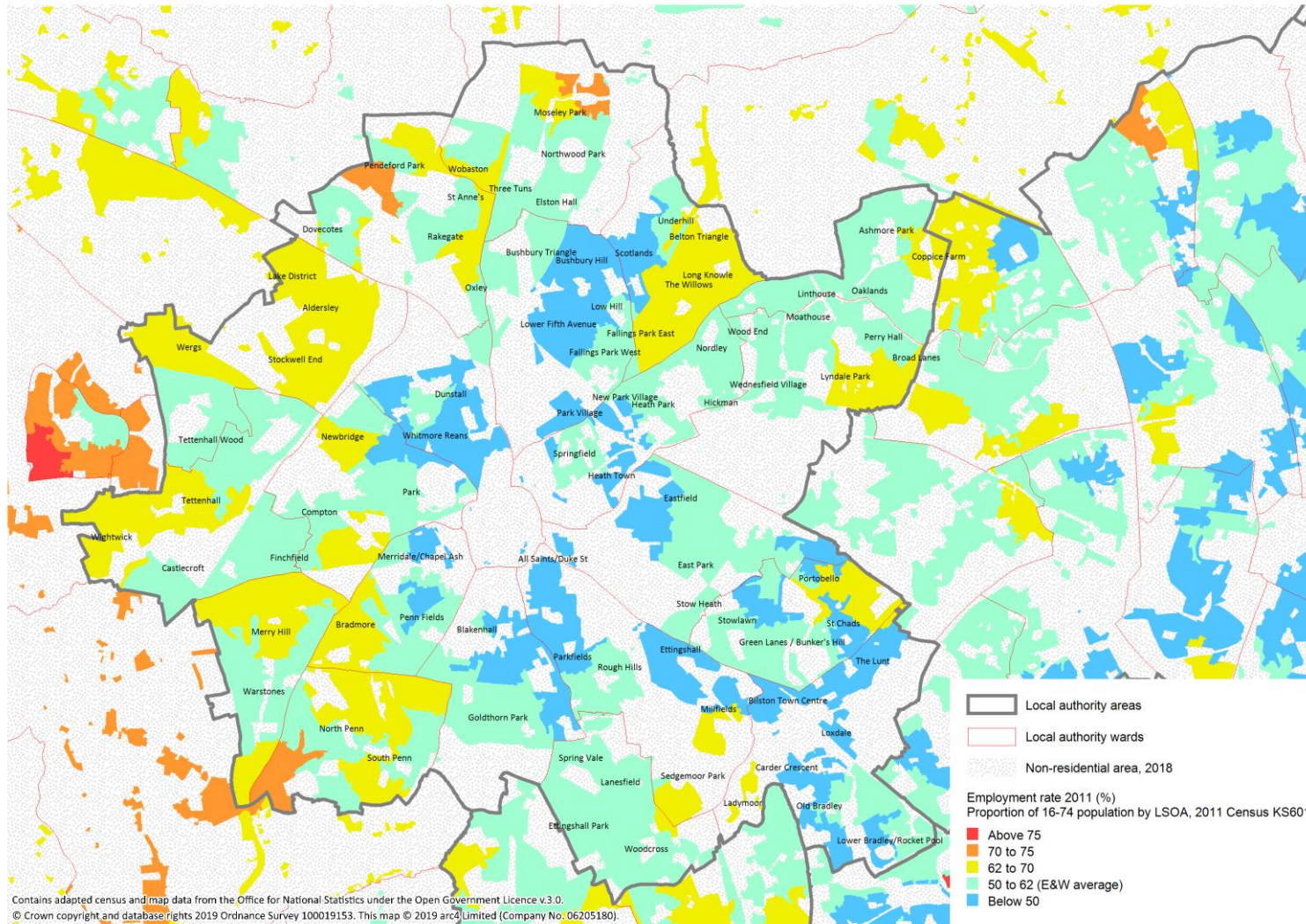


Figure 5 Total Employment 2017

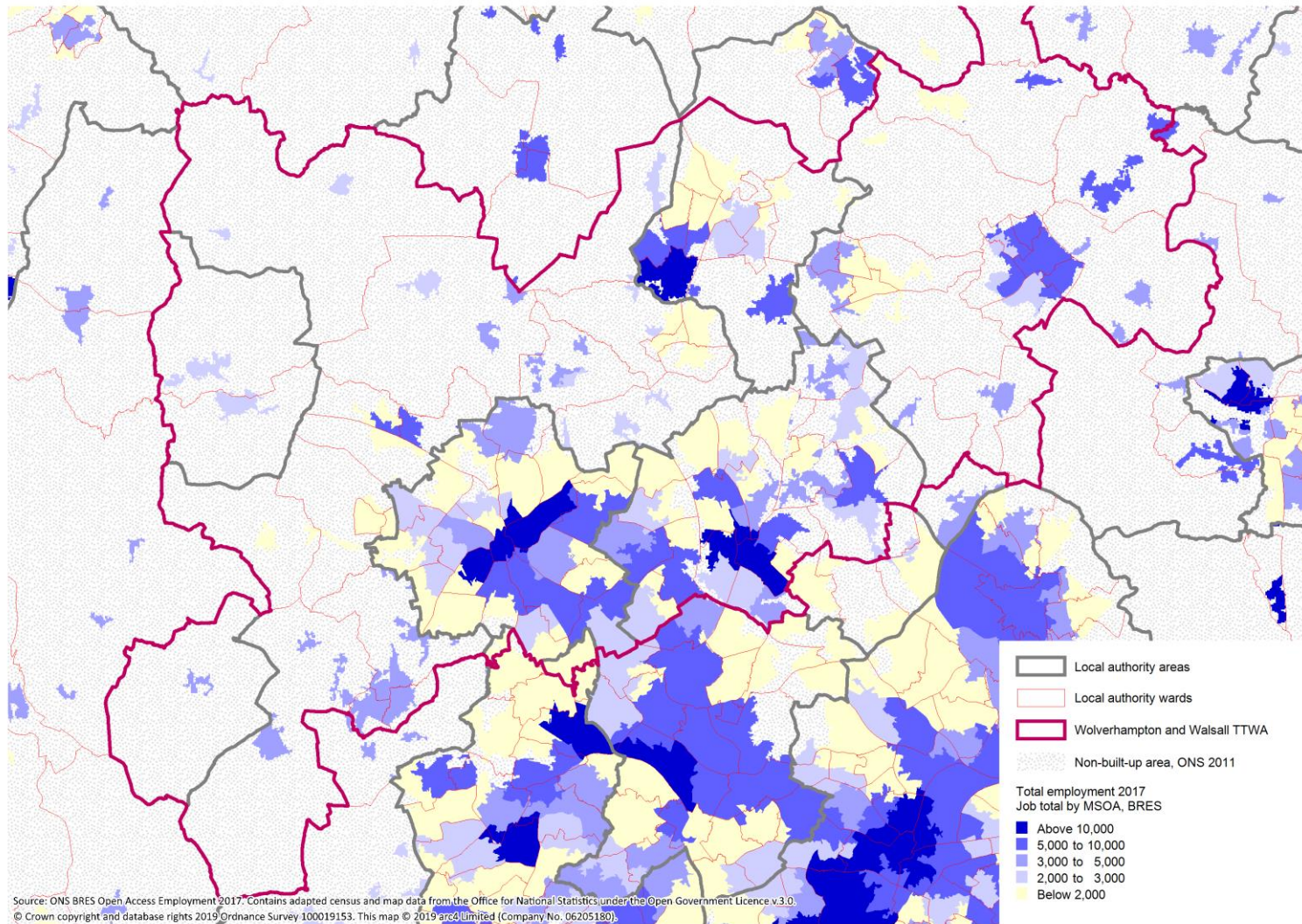


Figure 6 Change in Total Employment 2015 to 2017

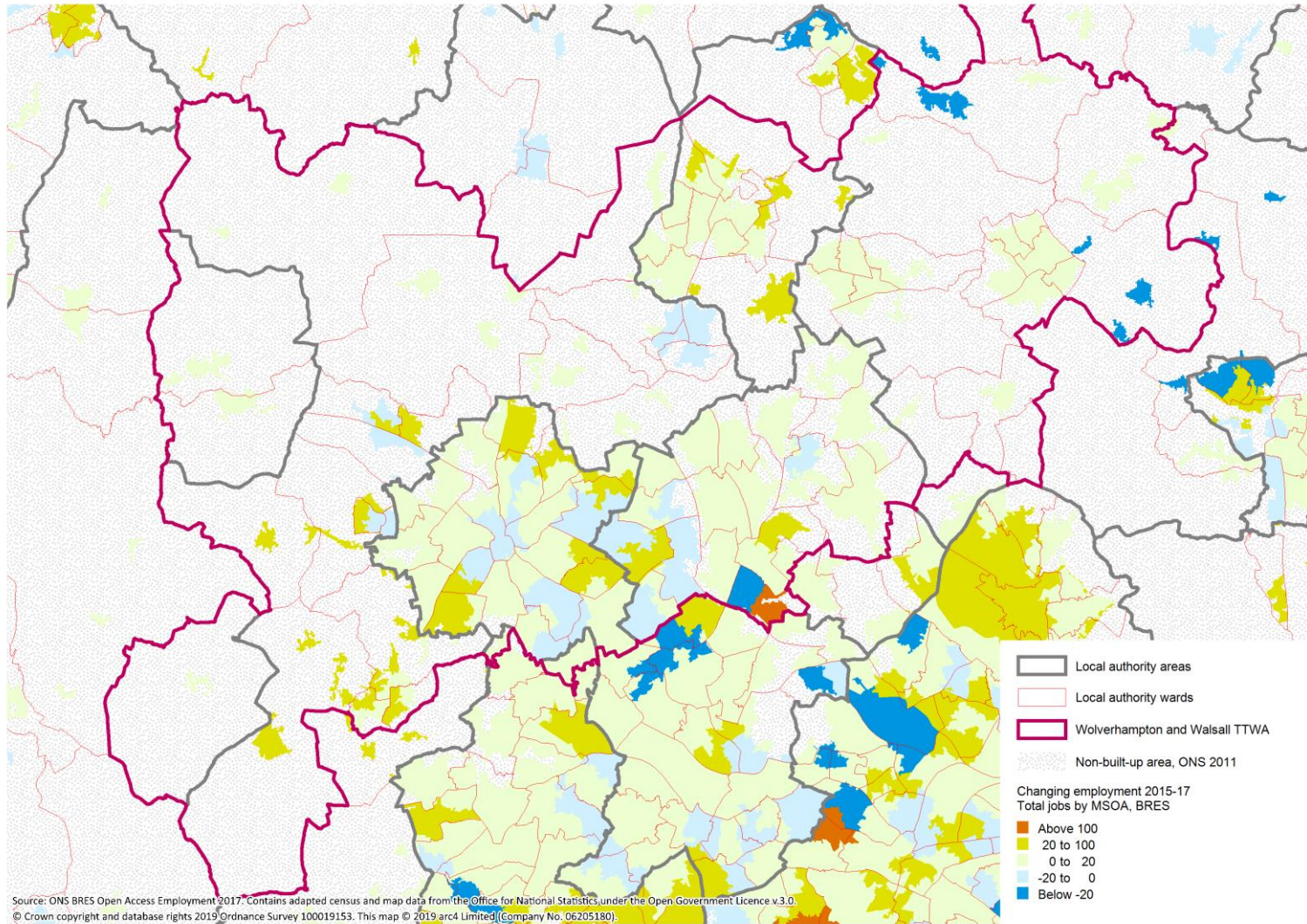
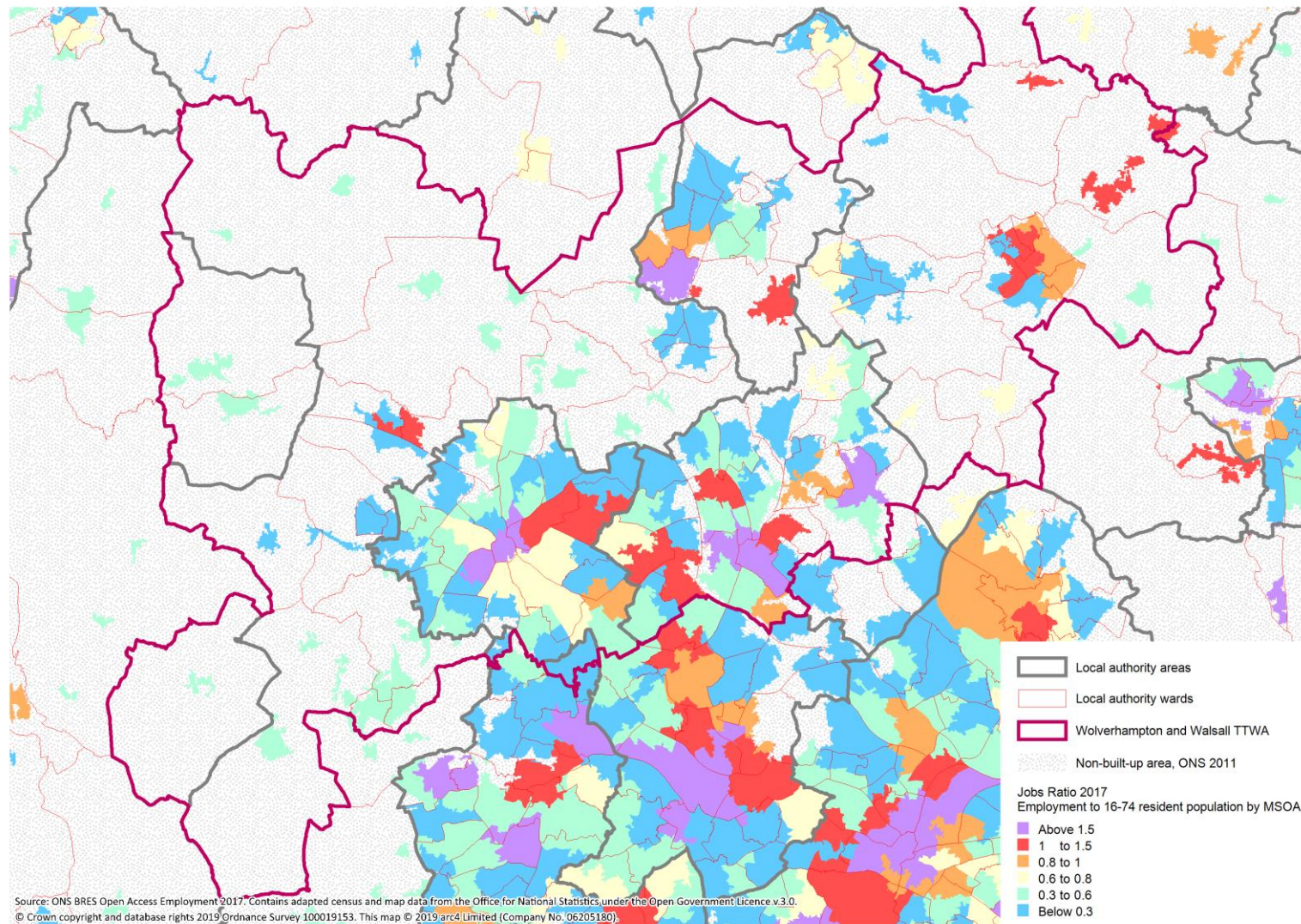


Figure 7 Local Jobs density 2017



4. Urban Form, Social Profile and Neighbourhood Function

- 4.1 Wolverhampton's sharp disparities between clusters of neighbourhoods in the west, the suburban periphery, and Inner-city and Black Country hinterland, flow from its twentieth-century urban and economic structure¹ and subsequent waves of development. Older housing, the social and economic legacy of deindustrialisation and large-scale municipal build have contributed to spatial polarisation, concentrations of families in poverty and at different times, neighbourhood instability. The recent measurements of deprivation have been reflected in the performance of the local economy and the city was ranked the nineteenth most deprived of 326 English districts in 2015; being placed 28 in 2007 (Table 3). The City gained significant national funding for successive area-based regeneration initiatives from the 1980s until 2010, covering areas such as Low Hill and Park Village, Whitmore Reans and All Saints.² These urban renewal initiatives modernised and secured the use of these neighbourhoods for the 21st Century and they have been instrumental in facilitating an increase in population for the City over the last two decades, reversing the trajectory of decline inherited from the previous 30 years when deindustrialisation was at its peak.
- 4.2 The City contains many economically successful neighbourhoods, with the strongest clusters being located in the west, however lower household incomes and earnings (Figure 22), worklessness and reliance on benefits persist in other parts of Wolverhampton, with evidence of continuing labour market exclusion in growing BME communities (Figure 20 and Figure 21). Given the attractiveness of the City to international migration, it is an increasingly diverse environment but there are long standing trends towards concentrated overcrowding in some neighbourhoods popular with, and accessible to, inward movers. These localities generate younger age profiles which contrast with the ageing suburban communities which have a tendency to produce under occupied dwellings.
- 4.3 As is evident elsewhere in the UK, owner occupation has fallen locally, with a number of dominant privately-rented (PRS) localities emerging since 2011, usually in areas with a lower house price profile. Stock condition and PRS regulatory pressures are and will remain a major challenge in these locations in the immediate future. The scale of PRS households needing Housing Benefit in 2018 including working but poor households is evident in Figure 23 and Figure 24 which show traditional PRS localities and also ex-RTB stock in council-built areas. The overall reliance on Housing Benefit for those of working age is comparable to that in the social rented sector in the central areas of Wolverhampton, and evidence of multiple occupation is evident in the overall claimant rate which in some areas is expressed as greater than 100% of the households expected to reside there.

¹ CSR Partnership, 'Wolverhampton Neighbourhood Renewal Strategy Final Report', [consultancy report], Birmingham: CSR Partnership Ltd, 2002, 12-14.

² Audit Commission, 'Urban Regeneration and Economic Development: The local government dimension', [government report], London: HMSO, 1989; Steven Henderson, 'An Evaluation of the Layering and Legacy of Area-based Regeneration Initiatives in England—the Case of Wolverhampton', *Urban Studies*, 49/6 (2012), 1201–27.

- 4.4 The following maps trace these drivers at local level. Wolverhampton has a distinct city structure within an otherwise fragmented conurbation. There is not a simple east-west divide in Wolverhampton; the detailed locality mapping undertaken in the study indicates the city comprises distinct sub-areas of residential markets reflecting housing age, type and tenure, social mix and also historic local identities. So Figure 8 shows the periods of residential housing development alongside changing land use during the last century within the Black Country. The predominant build type in Figure 11 reveal its surviving Victorian terraced inner core and post-war replacement flats and maisonettes; the prevalent interwar and post-war semi-detached suburban neighbourhoods (44.7% of total dwellings); and the western flank of detached housing, which also characterises satellite settlements in South Staffordshire.
- 4.5 The age and type maps should be examined in conjunction with housing tenure (Figure 12). Wolverhampton had the lowest owner-occupation in the Black Country in 2011 (56.6% of households) but it characterises the city's suburban neighbourhoods. Despite large-scale clearance, sales and private new build since the 1980s, the original municipal footprint is highly evident in Figure 12 which maps the most significant tenure at neighbourhood level and Figure 13 which specifically highlights concentrations of social renting. The combination of these maps and that of concentrations of private renting (Figure 14) provide a footprint for many of the socioeconomic maps and indicators highlighted in this report. Although a grounded understanding of historic urban development aids policy development, neighbourhoods do not stand still, and new build has been significant across a wedge of the city culminating in Bilston, but not (yet) the city centre (Figure 9). Identified future housing land is primarily located in a northern corridor along the Stafford Road; a city centre zone spreading beyond the ring road; in Heath Town; and a southern corridor to Bilston (Figure 45).
- 4.6 Several maps provide geodemographic and social classifications of Wolverhampton. Figure 15 is a fine-grained and complex analysis based on the 2011 Census. What stands out is the BME, largely Asian inner housing market and localities of 'migration and churn' appearing as an extension of the core Black Country. Figure 16 to Figure 18 utilise Cameo, a major credit and financial database to update this to 2018, profiling the principal household groups at neighbourhood level. They reflect the impact of 'residential sorting': the combined effects of housing and labour markets and factors generating poverty and low income.³ Figure 18 usefully underlines neighbourhood function: young couples with children in central areas, older households in the fringe.
- 4.7 While Wolverhampton has recently slipped in the overall district deprivation ranking (IMD) the neighbourhood picture is more complex (Figure 25 and Figure 26). Whitmore Reans, All Saints and Lower Fifth Avenue improved in relative terms between 2007 and 2015, but Penn Fields and part of The Lunt officially became more deprived on the national index.
- 4.8 Based on this mapping, seven residential sub-areas of the city have been identified at Figure 27 and they are briefly discussed below, in profiles also touching on housing

³ Nick Bailey, Wouter P. C. van Gent, and Sako Musterd, 'Remaking Urban Segregation: Processes of Income Sorting and Neighbourhood Change', *Population, Space and Place*, 23/3 (2017), 1-16, 2.

market performance charted in the next chapter. They do not readily equate towards similar-sized and neutrally framed electoral-democratic territories within the local authority; rather they reflect the city's intrinsic neighbourhoods as they continue to evolve.

4.9 The first such area is the **Inner Core** of Wolverhampton: the neighbourhoods ringing the city centre, from Dunstall through Penn Fields to All Saints in the west; and Springfield to Heath Park in the east, characterised by:

- Older terraced and flats/maisonettes
- Expanding PRS, particularly Park
- New build in All Saints and Dunstall
- Major housing pipeline in Heath Town and city centre
- Diversity, with areas such as Whitmore Reans above 75% BME
- Poorer groups except Newbridge
- Young couples with children
- Deprived especially Heath Town
- Widespread working-poor households in PRS
- Higher-level qualifications in western zone, especially Newbridge
- Despite areas of higher skills, employment rate mostly below 50%
- Significant price falls in places, to below 50% of regional average
- Lower value flat rental market in core
- High PRS yield

4.10 The **Low Hill and Northern Municipal** zone include mainly interwar Bushbury Village, Low Hill and Bushbury Hill out to Scotlands and Northwood Park marked by:

- Migration and churn features
- Families with school-age children
- Highly deprived especially Scotlands (among 1% most deprived nationally)
- Low incomes
- No qualifications prevalent
- Employment rate largely below 50%
- Low house prices and notably low sales activity
- High PRS yield

4.11 The **East Park and Southern Municipal** is a zone of two neighbourhood clusters of both interwar and post-war estates extending from Eastfield to Parkfield divided by an employment area along the A41 featuring;

- Rented family housing features

- Families with school-age children
 - Deprived, but improving
 - Low incomes
 - No qualifications prevalent
 - Employment rate largely below 50%
 - Lower-priced new build and major pipeline sites
 - High PRS yield
- 4.12 The **Bilston and South East Fringe** identified in Figure 27 is wider than historic Bilston; extending from Portobello to Ladypool and Woodcross and with similar characteristics to nearby Black Country towns such as Tipton, Wednesbury, Darlaston and Willenhall exhibiting:
- Social housing core
 - Significant new build
 - Rented family housing, migration and churn and ‘challenged diversity’ features
 - Families with school-age children
 - Deprived, but improvement in new build localities
 - No qualifications prevalent
 - Real terms price gains reflect new build
 - Prices in eastern town centre and the Lunt at half regional average
 - High PRS yield, especially at Lower Quartile level
- 4.13 **Oxley and Stafford Road** is a mostly post-war suburban area extending to council-built Dovecotes, mixed Pendeford Park and Wobaston and Moseley Park displaying:
- Major new and expected build at Stafford Road on brownfield sites in this key strategic corridor
 - Highly-varied social mix
 - Families with school-age children
 - Mixed deprivation picture, both of intensity and trajectory
 - Working poor households in PRS
- 4.14 The **Wednesfield and Eastern Suburban** zone extending along the A460 Cannock Road and Wednesfield Village culminating in Ashmore Park, including:
- City-edge new build
 - Older families and mature couples
 - Inner areas of migration and churn, deprivation, low income
 - Outer zone of ‘comfortable/paying mortgage’ semi-detached, with Lyndale Park increasingly affluent

- Lower-priced new build
- 4.15 The final zone is the **Tettenhall and Western Suburban**, stretching from the Lake District locality through historic Tettenhall, Penn, Goldthorne Park, Ettingshall Park and Sedgemoor Park denoted by:
- Significant new build
 - ‘Suburban achievers’ and pockets of urban professionals and ageing urban living
 - Wealthy/’business elite’ areas in Tettenhall
 - Older families and mature couples
 - Some neighbourhoods with a significant retired population
 - Widespread detached housing
 - Affluent, highly-qualified population, especially its satellite settlements
 - Highest incomes
 - High employment rate, but higher in Perton
 - House prices typically £180-270,000 or above
 - High-value new build
 - Median and LQ prices above regional average except council-built Warstones
 - Strongest price gain in Stockwell

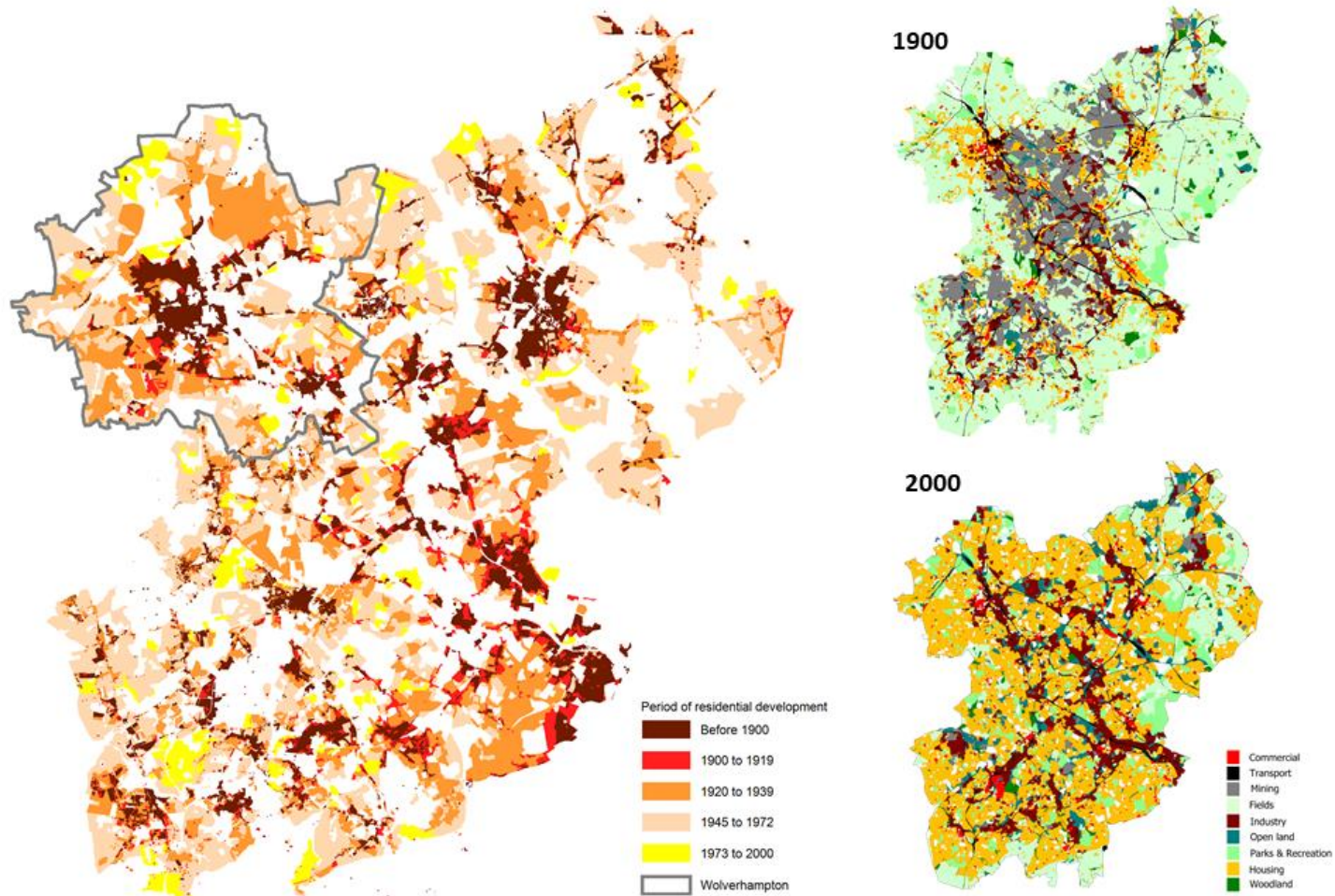
Indicator	Wolverhampton	Dudley	Sandwell	South Staffordshire	Walsall	Birmingham	West Midlands Region
Black and Minority Ethnicity (BME) Population 2001 (%)	24.6	7.5	22.0	3.2	14.8	34.4	13.8
BME Population 2011 (%)	35.5	11.5	34.2	5.4	23.1	46.9	20.8
Gross disposable household income (GDHI) per head 2016	13,926	15,878	13,164	18,166	13,791	14,093	16,766
GDHI per head index (UK = 100) 2007	71.7	81.7	67.7	93.5	71.0	72.5	86.3
GDHI per head index (UK = 100) 2016	73.8	79.9	68.1	94.0	71.9	74.2	86.4
Gross weekly pay 2018 (£)	488.0	526.2	486.6	584.4	500.0	532.5	571.1
Index of Multiple Deprivation 2007: local authority average rank of rank	28	111	10	266	48	14	...
Index of Multiple Deprivation 2015: local authority average rank of rank	19	118	12	253	41	11	...
18+ full-time students 2011 (% of 16+ population)	5.6	3.0	4.3	2.8	3.8	9.5	5.3
Private rented sector (PRS) Non-passported Housing Benefit claimants August 2018	1,862	1,580	2,637	432	2,373	13,343	46,036
PRS total Housing Benefit claimants August 2018	4,983	3,965	6,070	856	5,714	24,072	96,749
PRS Non-passported HB claimants rate August 2018 (per 1,000 households)	17.8	11.9	21.0	9.3	21.3	31.6	19.3
PRS total HB claimants rate August 2018 (per 1,000 households)	47.6	29.9	48.3	18.5	51.4	57.1	40.6

Source Census 2001 Table KS006; Census 2011 Table KS501EW; ONS Regional gross disposable household income (GDHI) at current basic prices; Annual survey of hours and earnings - resident analysis; DCLG, The English Indices of Deprivation 2007 and 2015, DWP Stat-Xplore. Adapted data from ONS, DCLG and DWP under the Open Government Licence v.3.0.

Table 4 Housing stock and tenure 2011							
Indicator	Wolverhampton	Dudley	Sandwell	South Staffordshire	Walsall	Birmingham	West Midlands Region
Total dwellings	105,825	133,908	127,072	45,621	110,943	423,633	2,376,728
Detached dwelling (%)	15.7	21.5	11.2	39	18.2	10.9	23.7
Semi-detached dwelling (%)	44.7	48.4	43.5	39.2	42.1	34.7	36.8
Terraced dwelling (%)	17.7	16.1	26.2	10.7	22.3	29.4	22.9
Flat or maisonette dwelling (%)	21.8	13.8	19.1	9.2	17.3	25	16.2
Owner-occupier household (%)	56.6	68.8	56.9	75.7	62.4	55.2	64.9
Social rented household (%)	28.0	19.8	27.5	13.9	24.1	24.2	19.0
Private rented household (%)	13.2	9.2	12.9	8.5	11.7	17.9	14.0

Source: 2011 Census, KS401EW and KS401. © Crown copyright: Adapted data from ONS under the Open Government Licence v.3.0.

Figure 8 Housing and wider urban structure 1900 to 2000



Source: CSR Partnership 2004. Contains adapted map data from the Office for National Statistics under the Open Government Licence v3.0. © Crown copyright and database rights 2018 Ordnance Survey 100019153. This map © 2018 arc4 Limited (Company No. 06205180).

Source: Black Country Historic Landscape Characterisation, 2010. © Crown copyright. All rights reserved 100019537 2010.

Figure 10 Age of Housing 2015

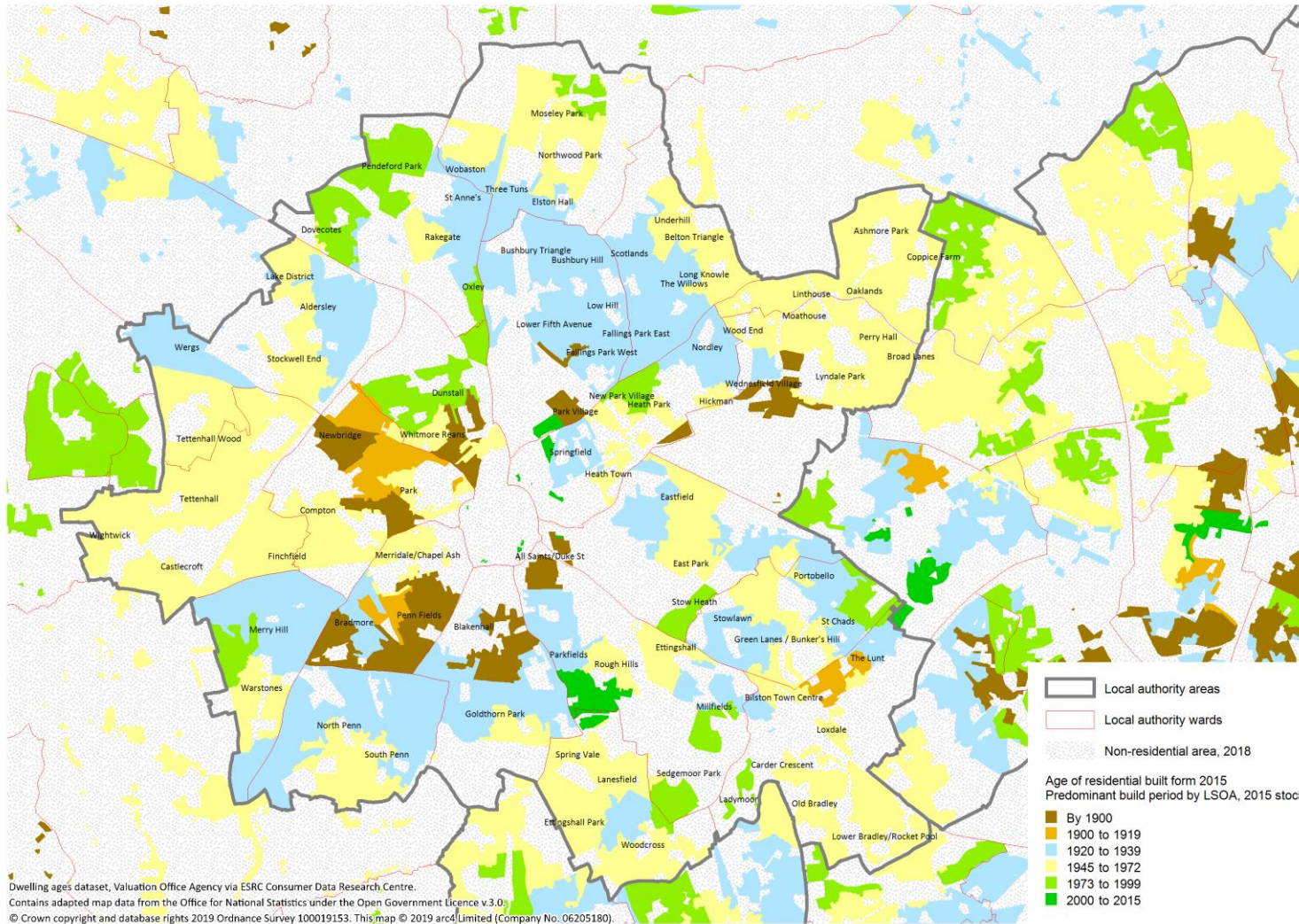


Figure 11 Type of Housing 2011

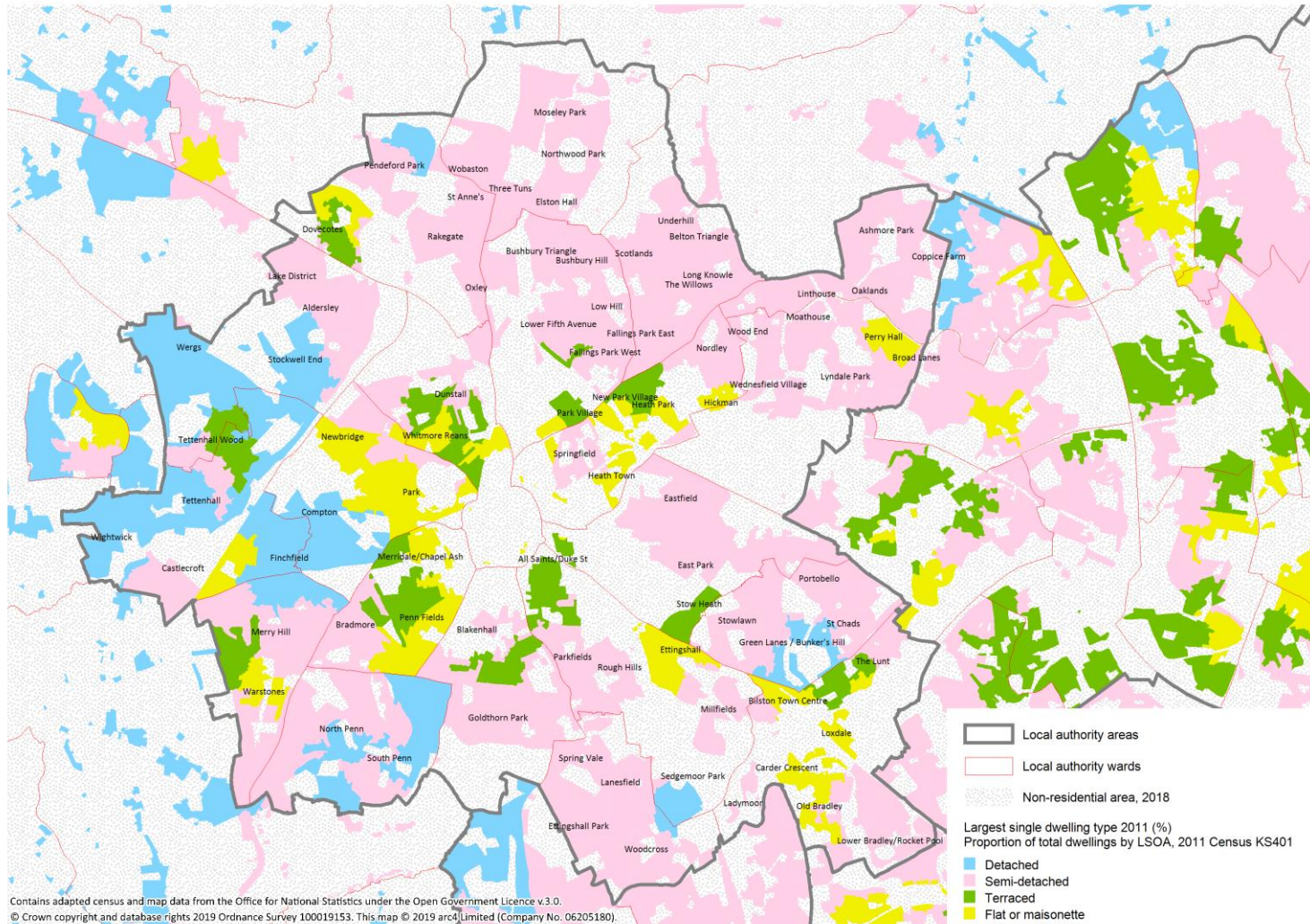


Figure 12 Tenure of Housing 2011

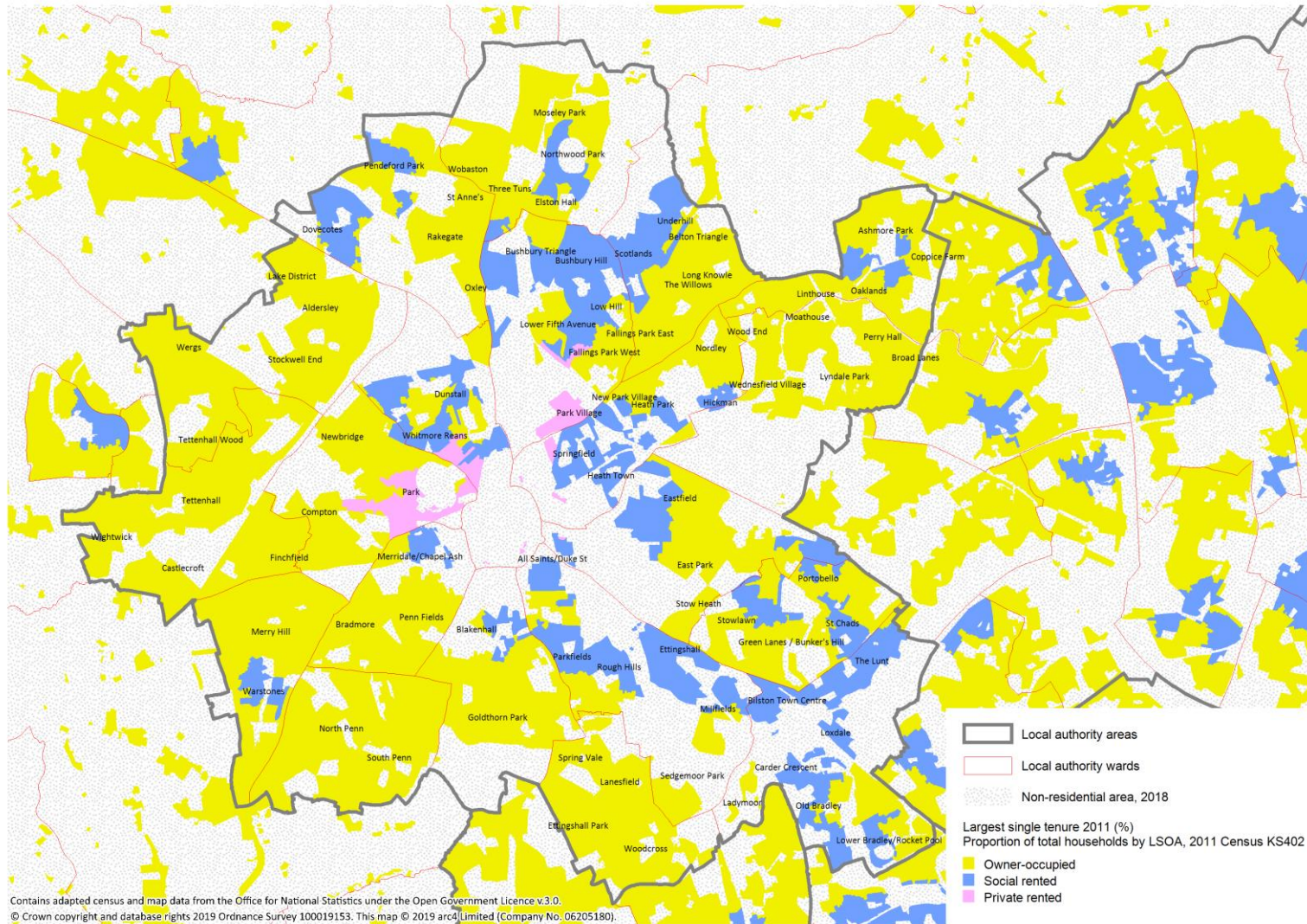


Figure 13 Social Renting 2011

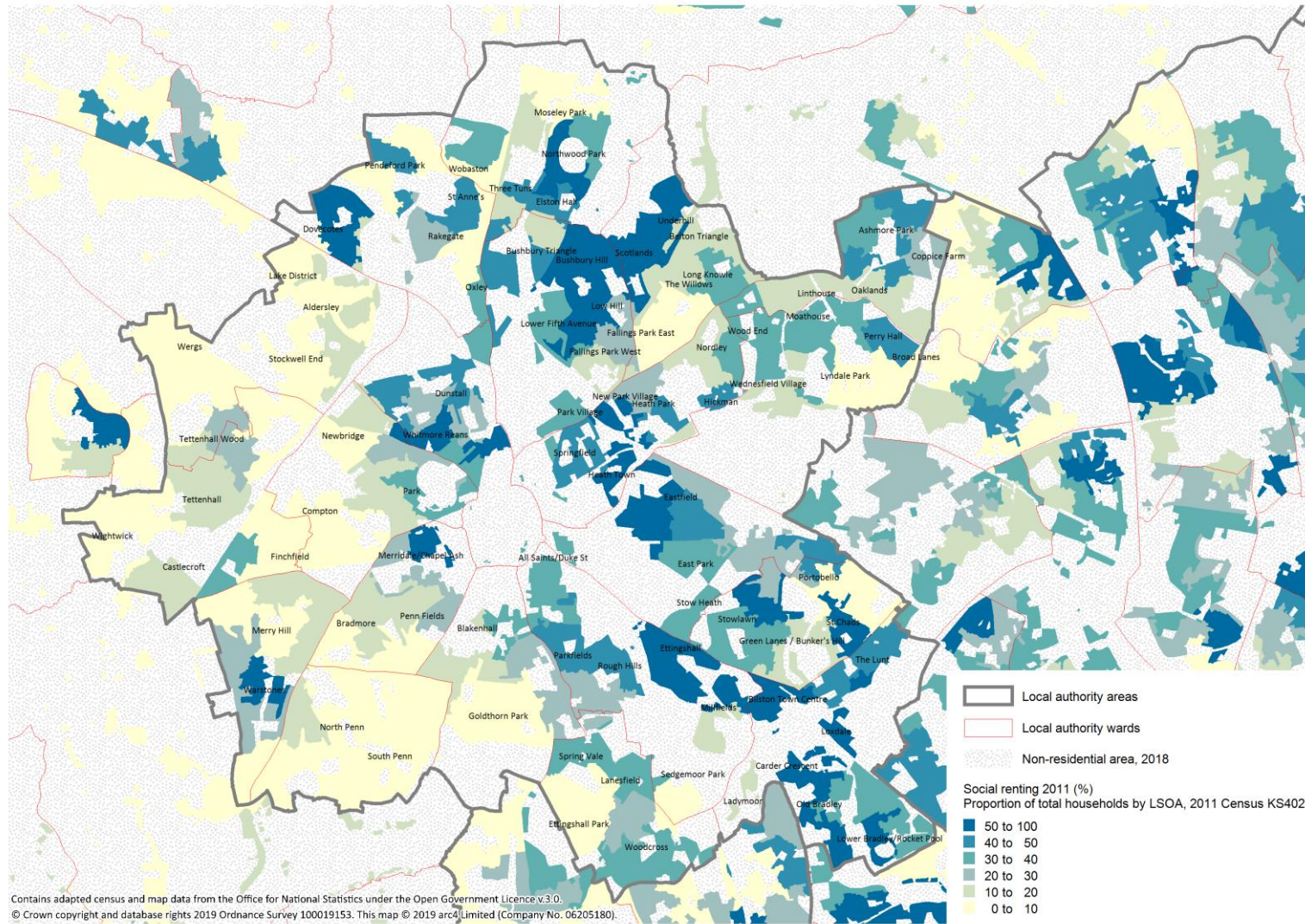


Figure 14 Private Renting 2011

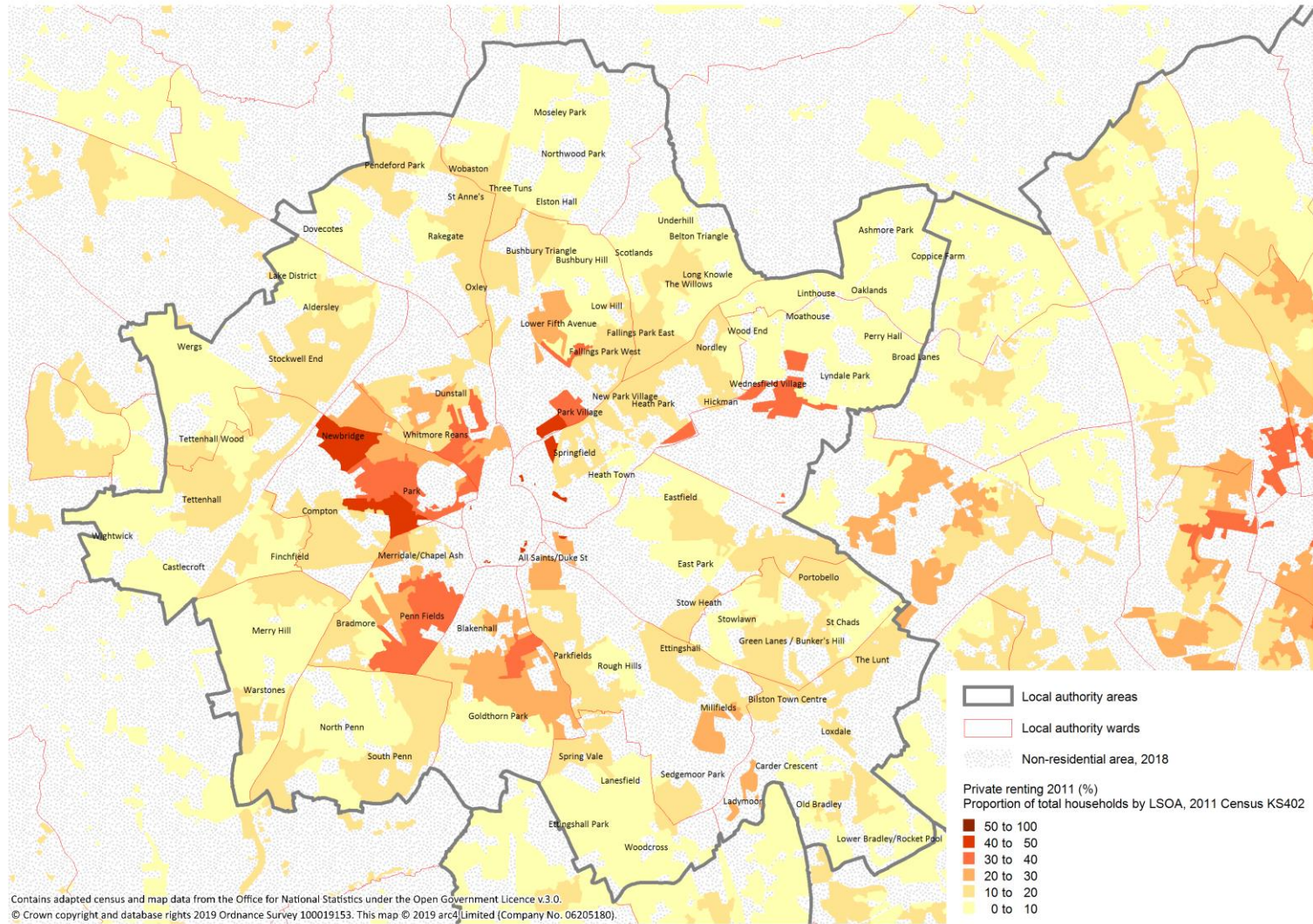


Figure 15 OAC Geodemographic 2011

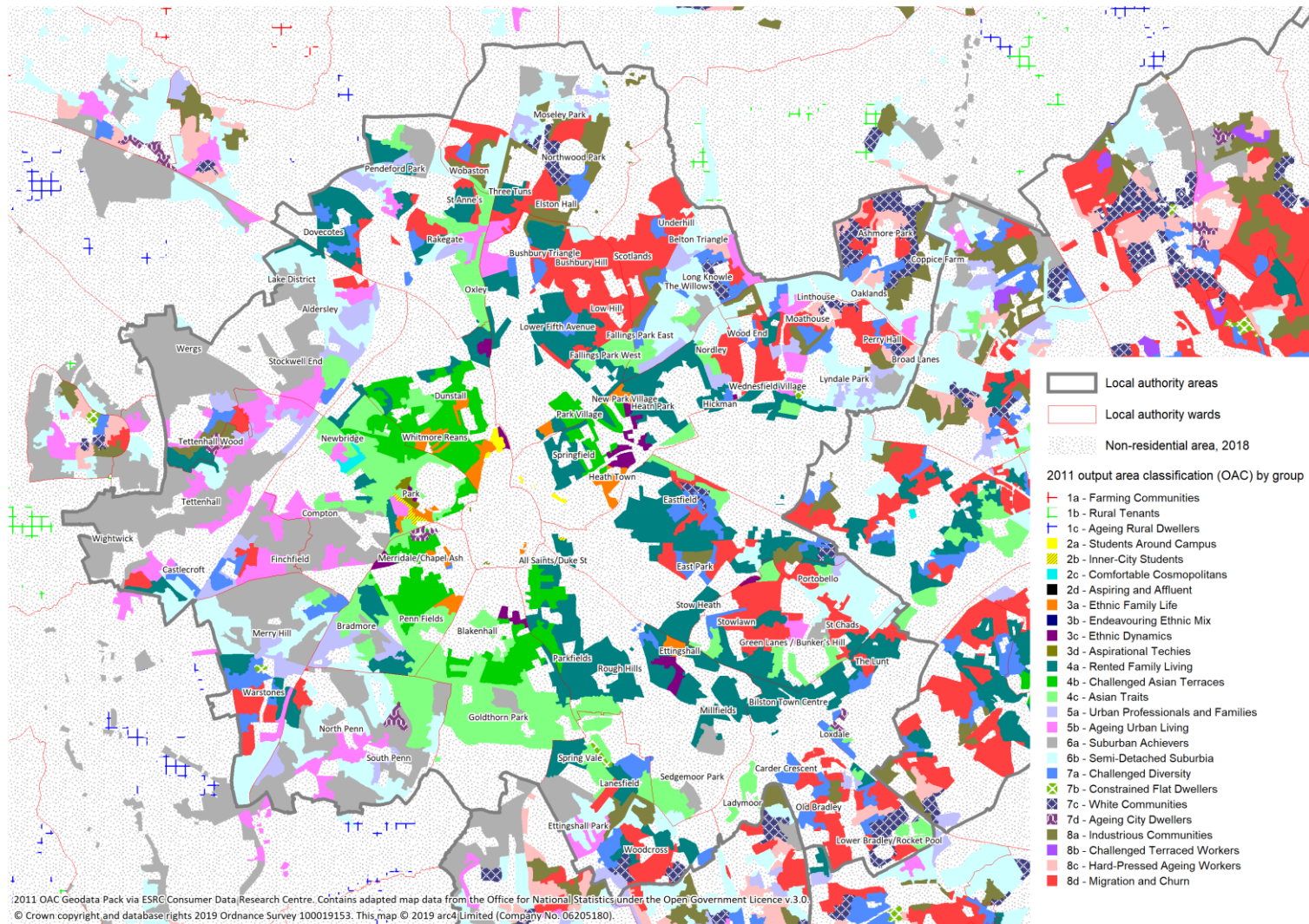


Figure 16 Cameo Geodemographic: UKGP Type 2018

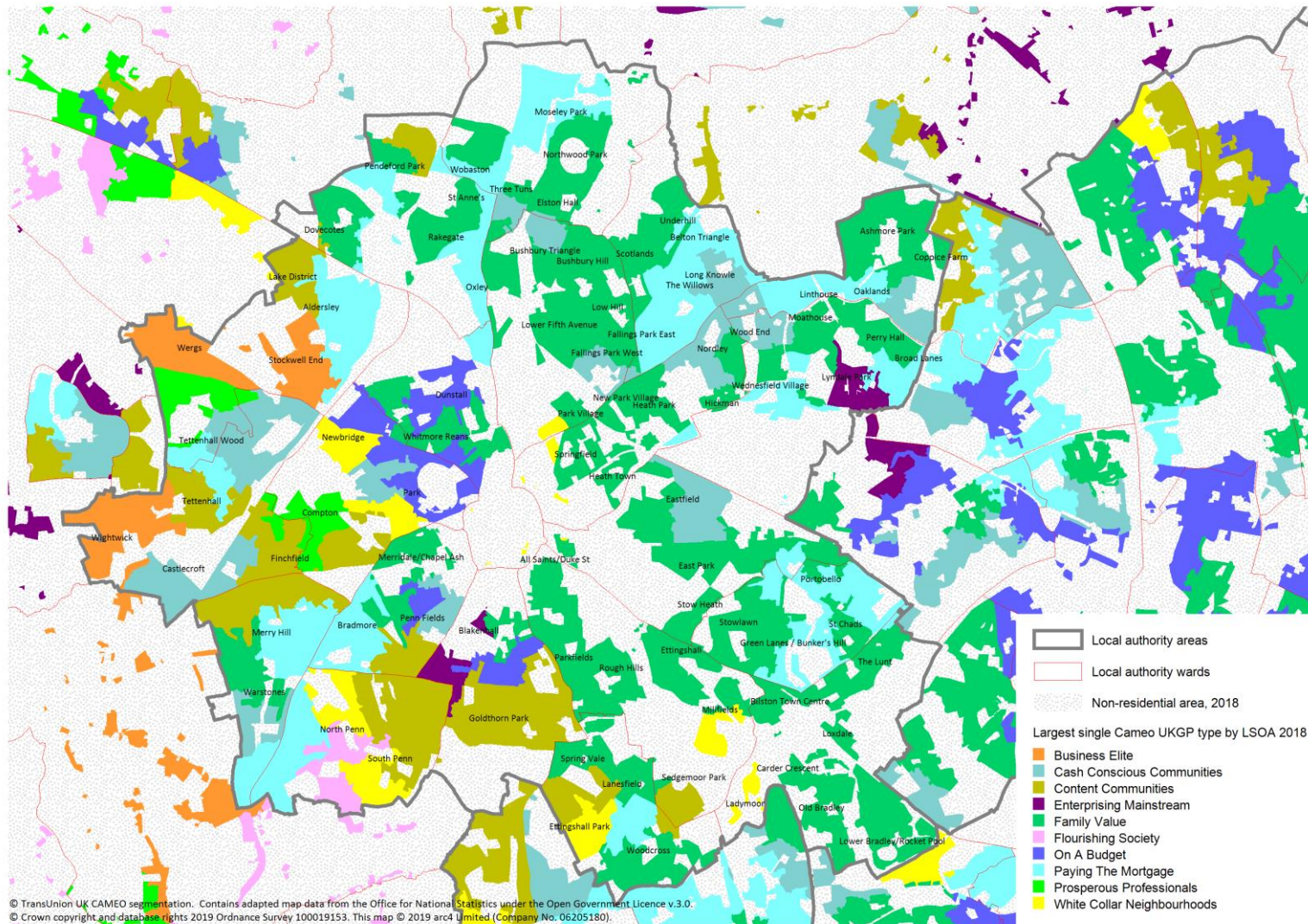


Figure 17 Cameo Geodemographic: INTL Group 2018

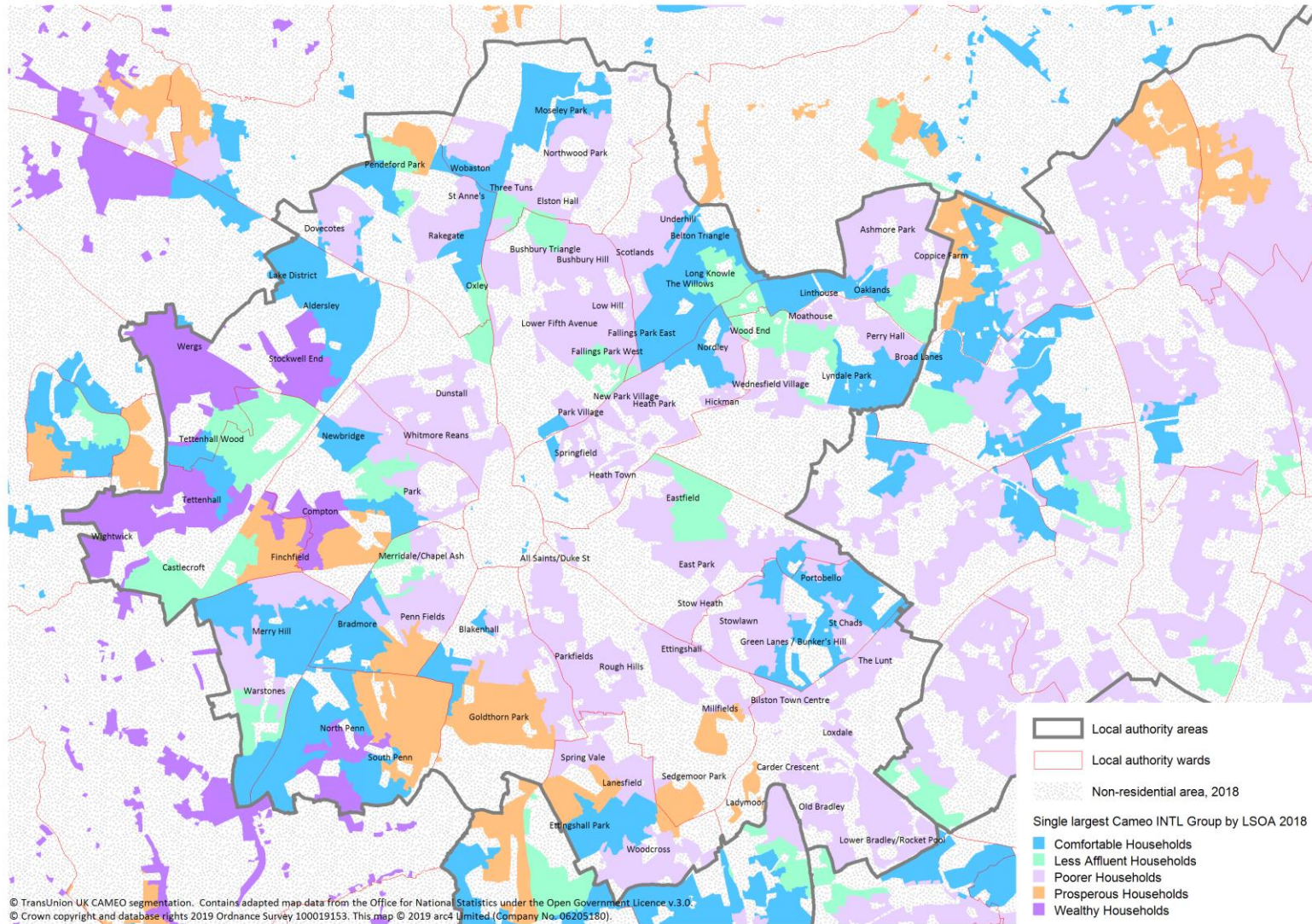


Figure 18 Cameo Geodemographic: INTL Name 2018

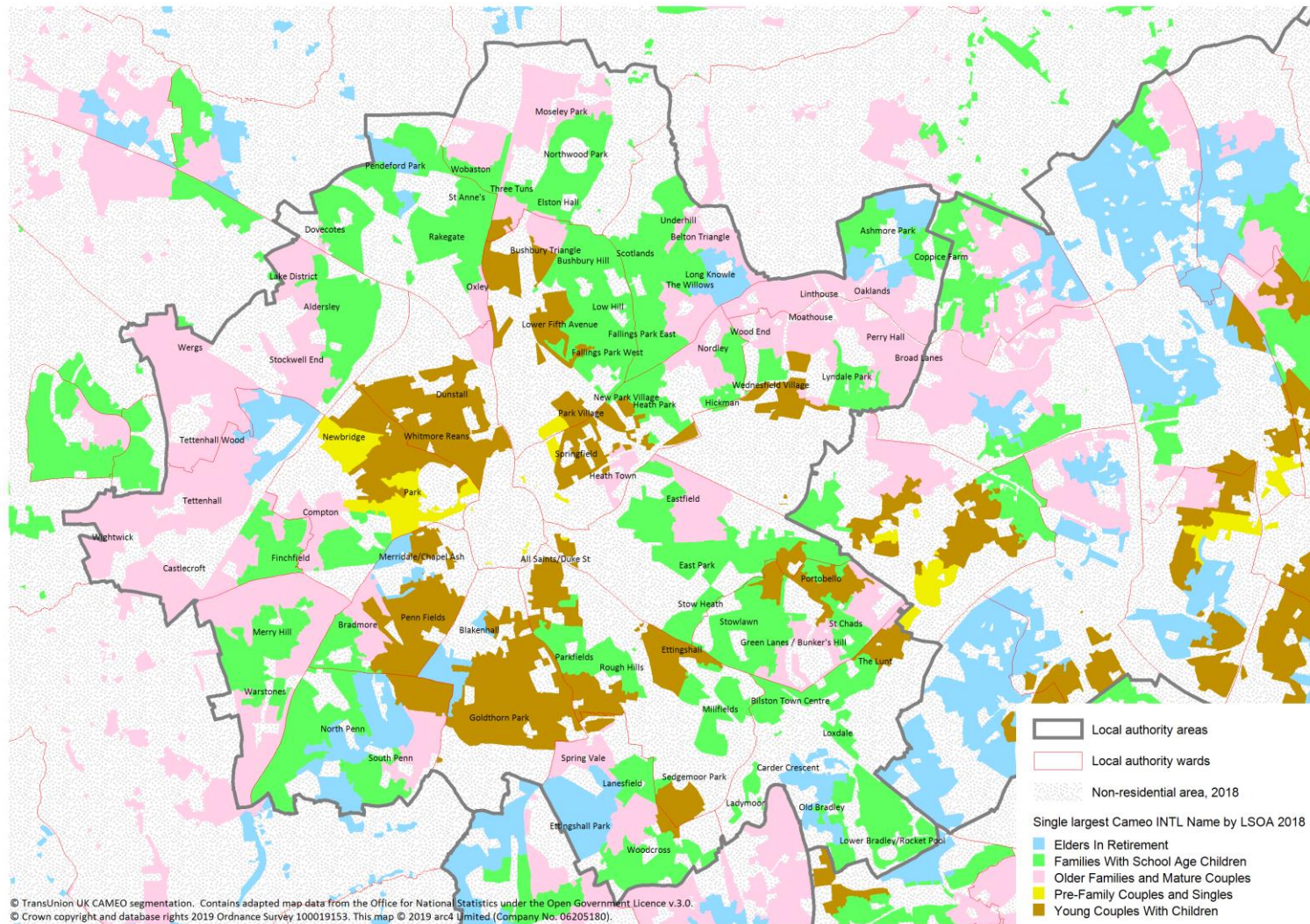


Figure 19 Students 2011

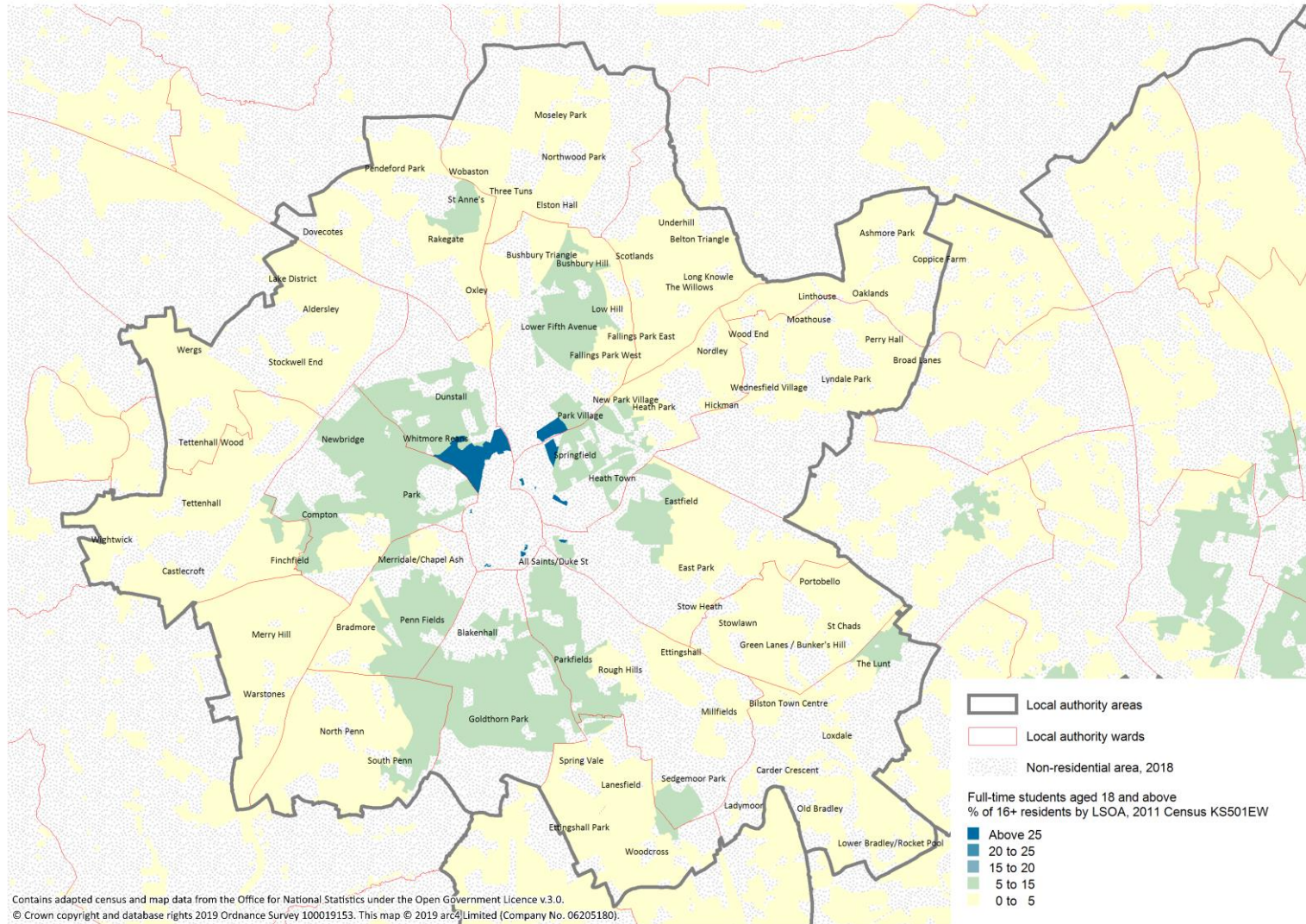


Figure 20 Black and Minority Ethnicity 2001

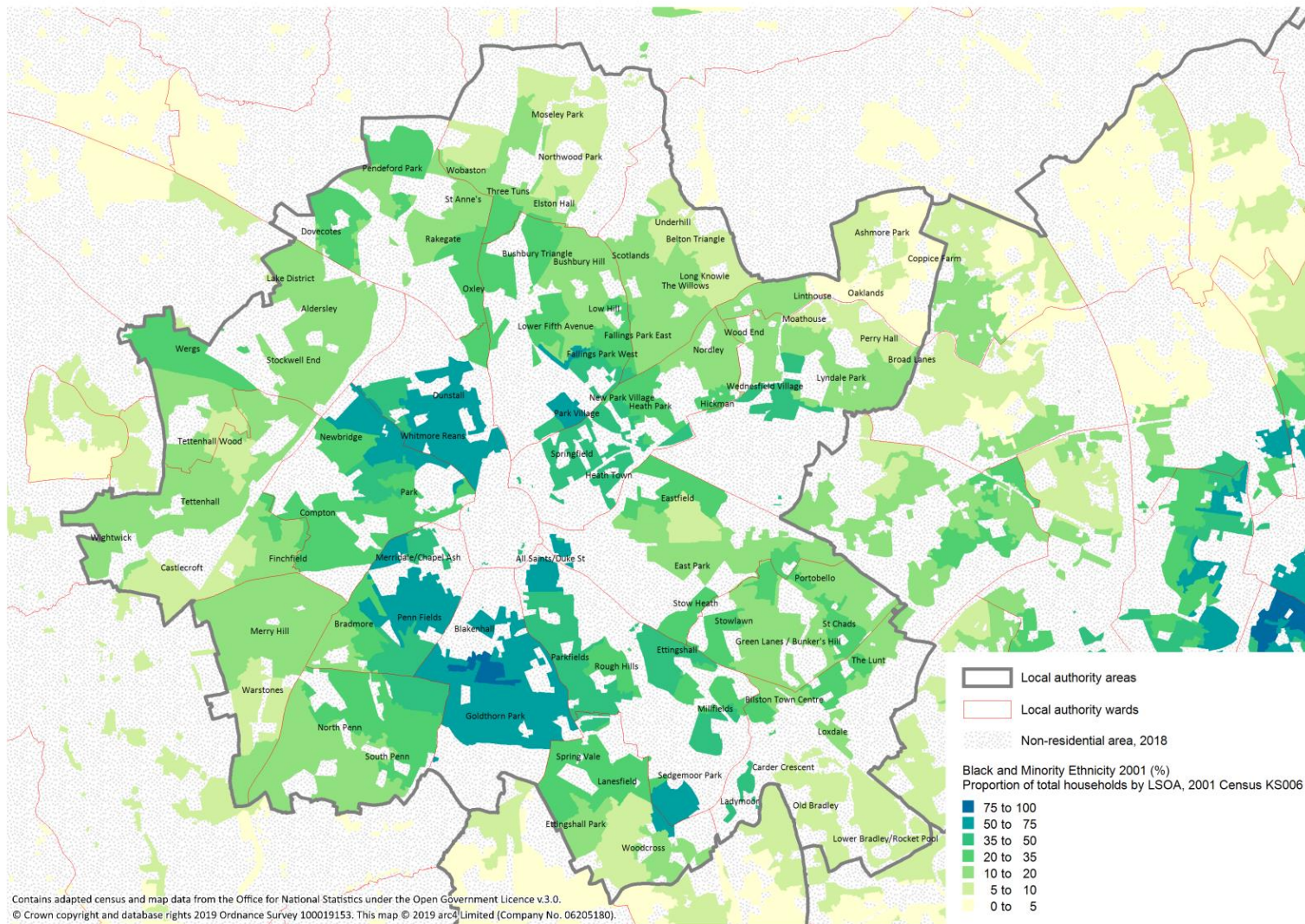


Figure 21 Black and Minority Ethnicity 2011

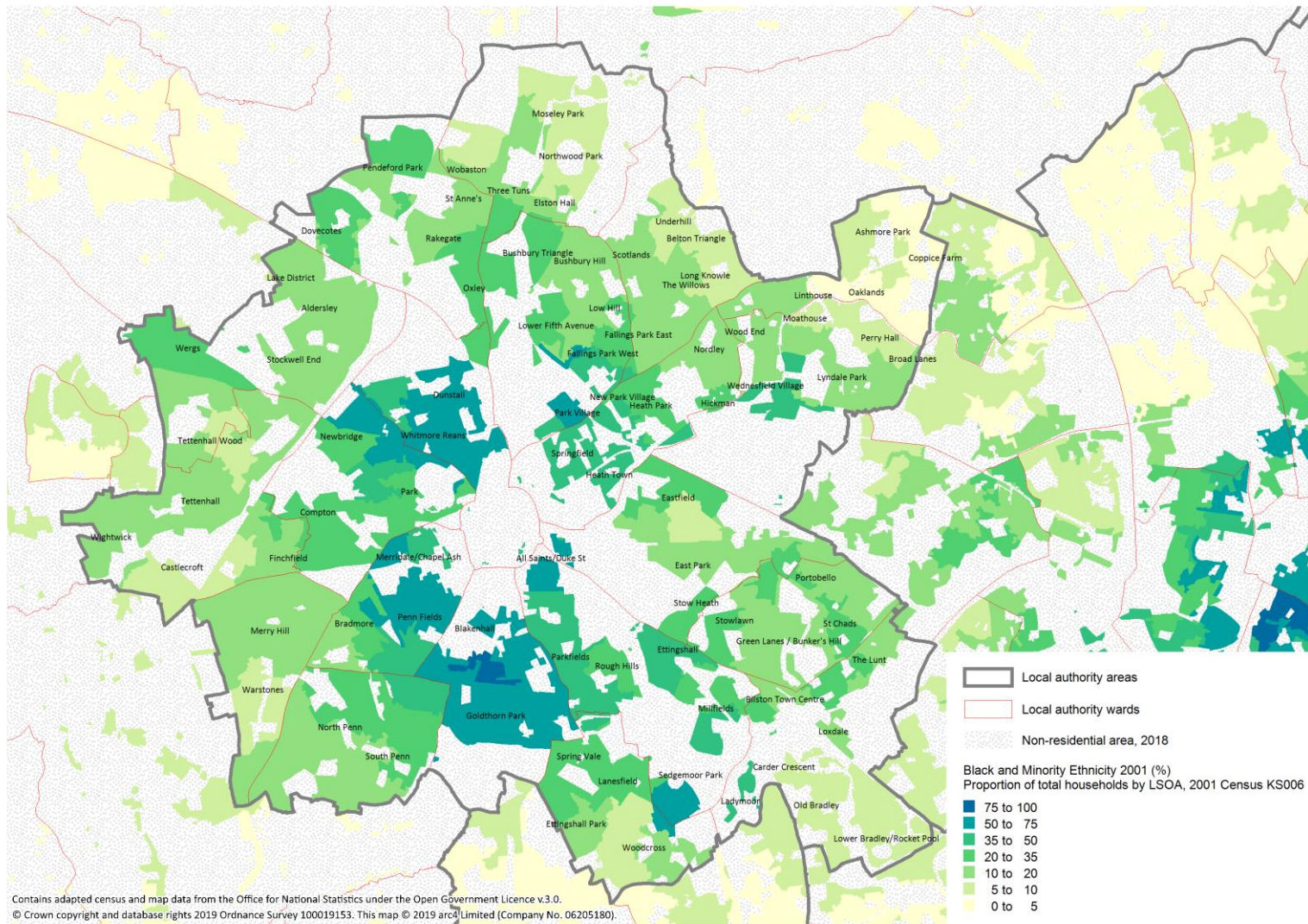


Figure 22 Household Income 2015-16

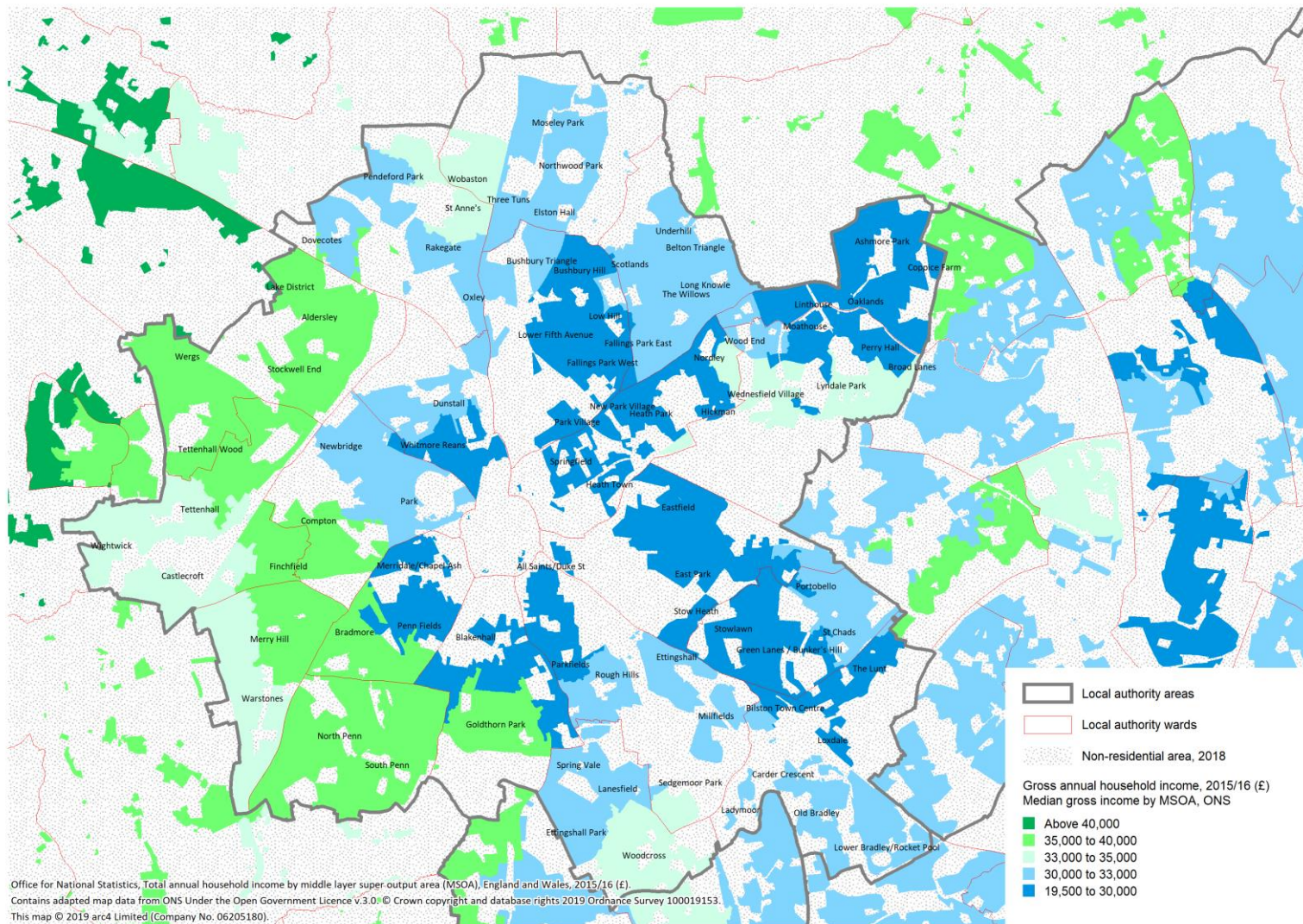


Figure 23 Working low-income PRS households: Non-passported Housing Benefit claims 2018

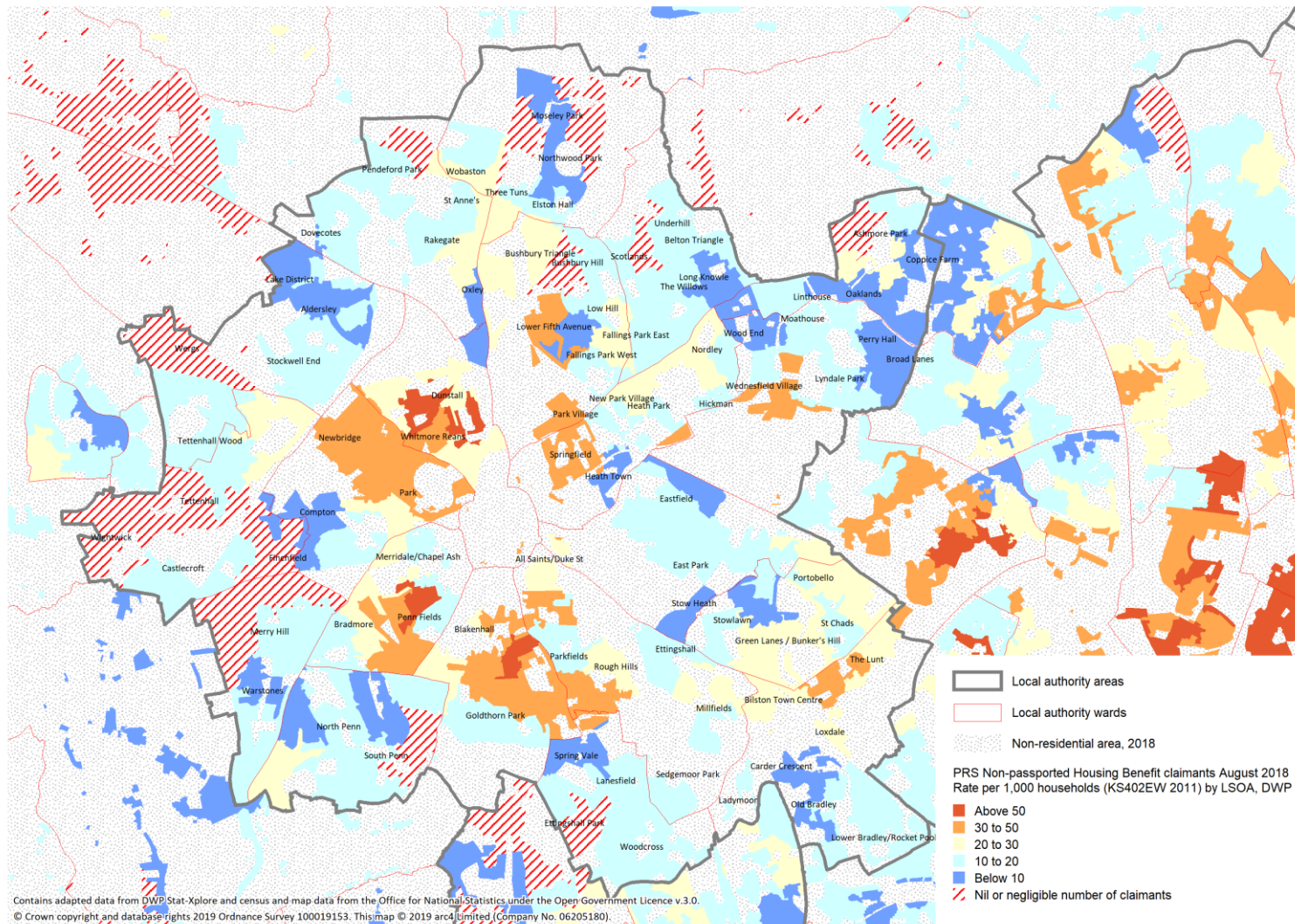


Figure 24 Low-income PRS households: Total Housing Benefit claims 2018

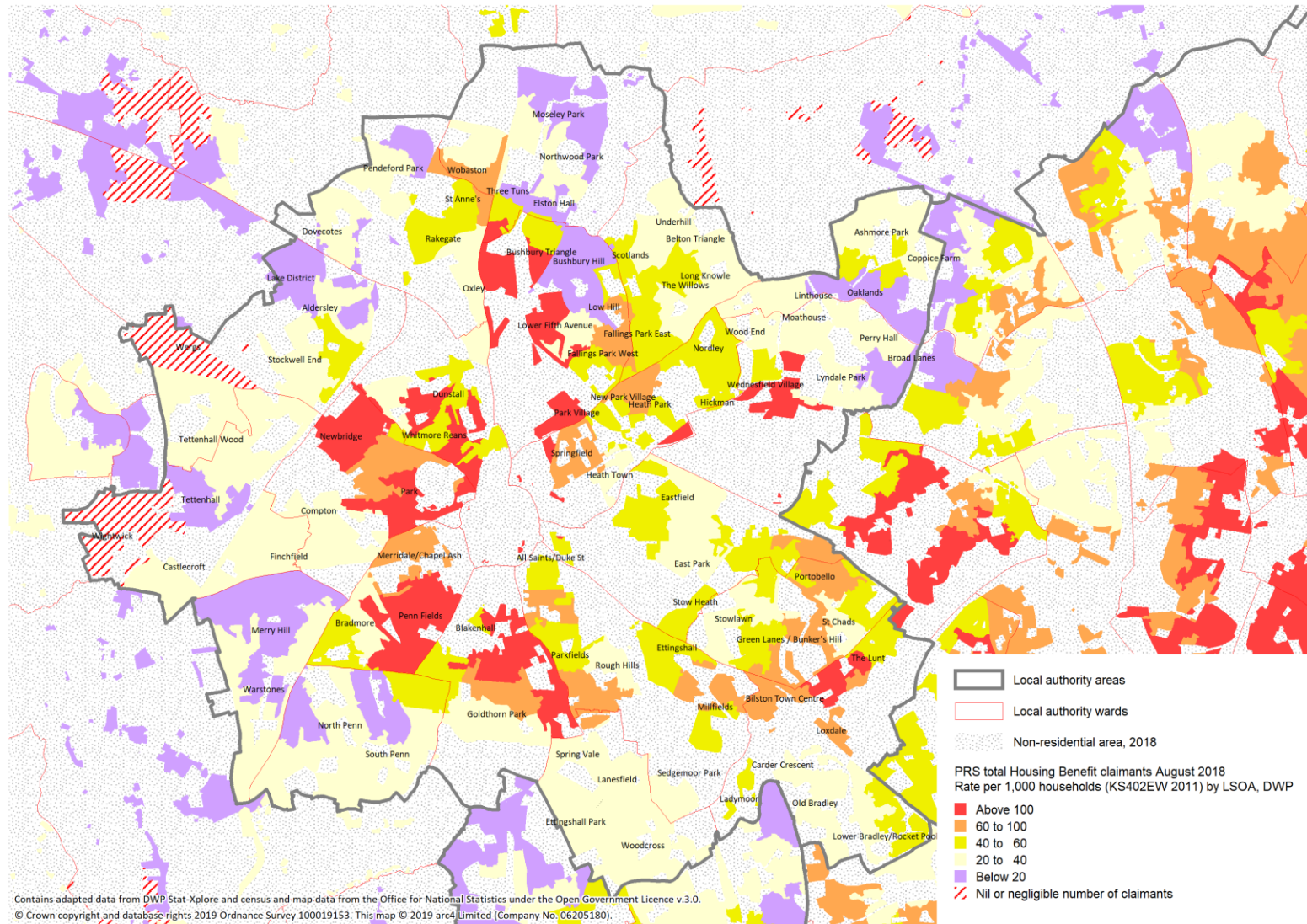


Figure 25 Multiple Deprivation 2007

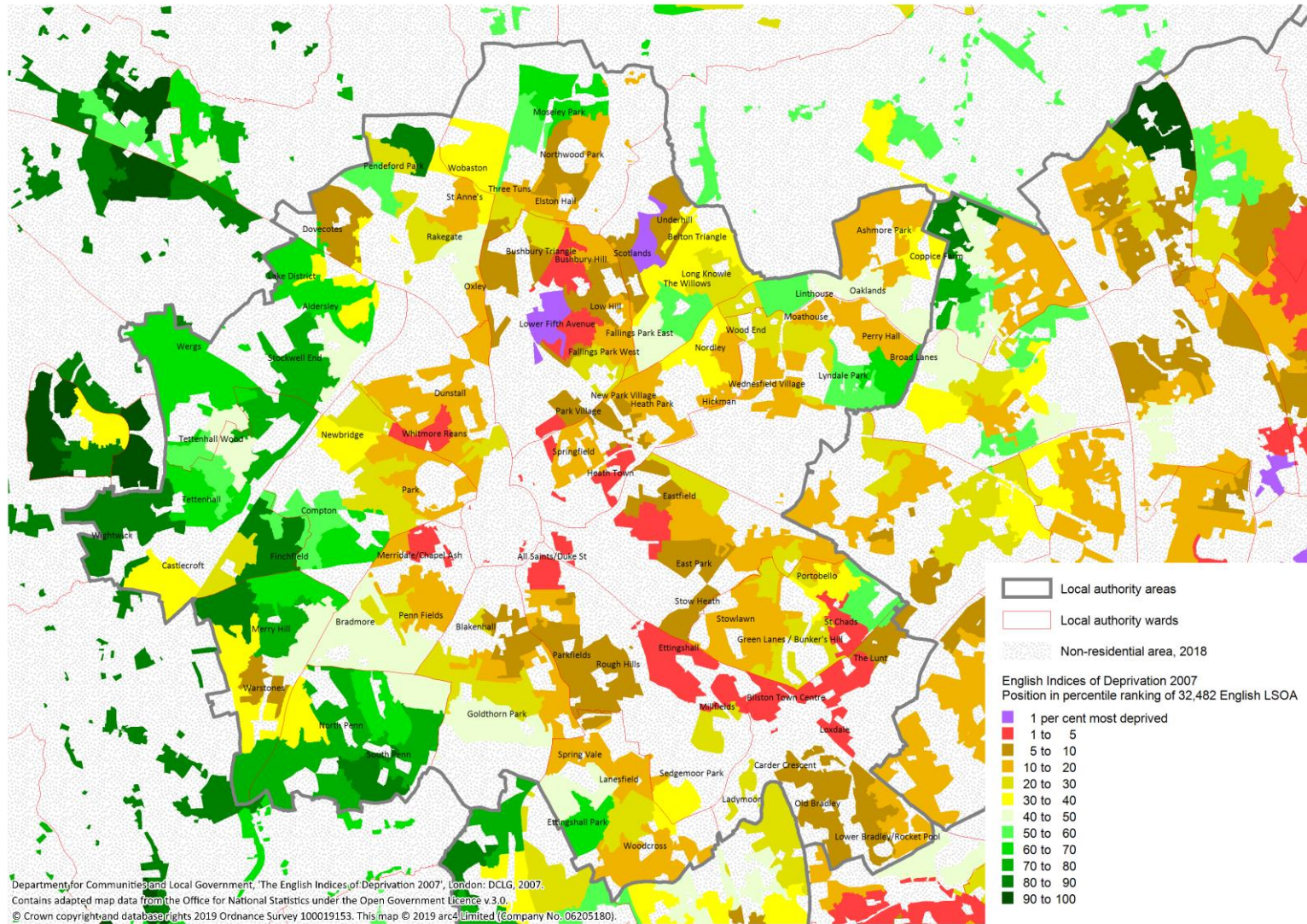


Figure 26 Multiple Deprivation 2015

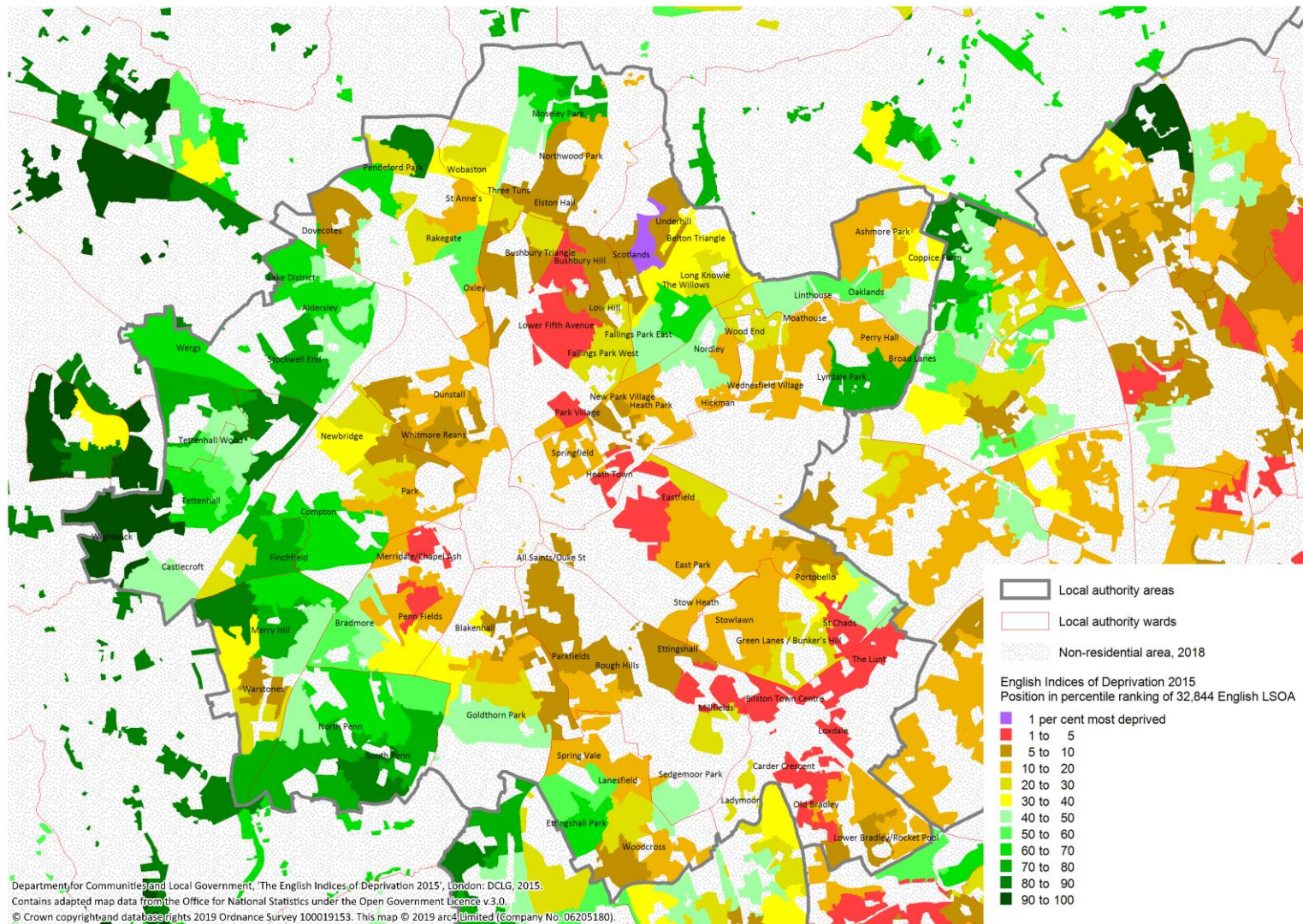
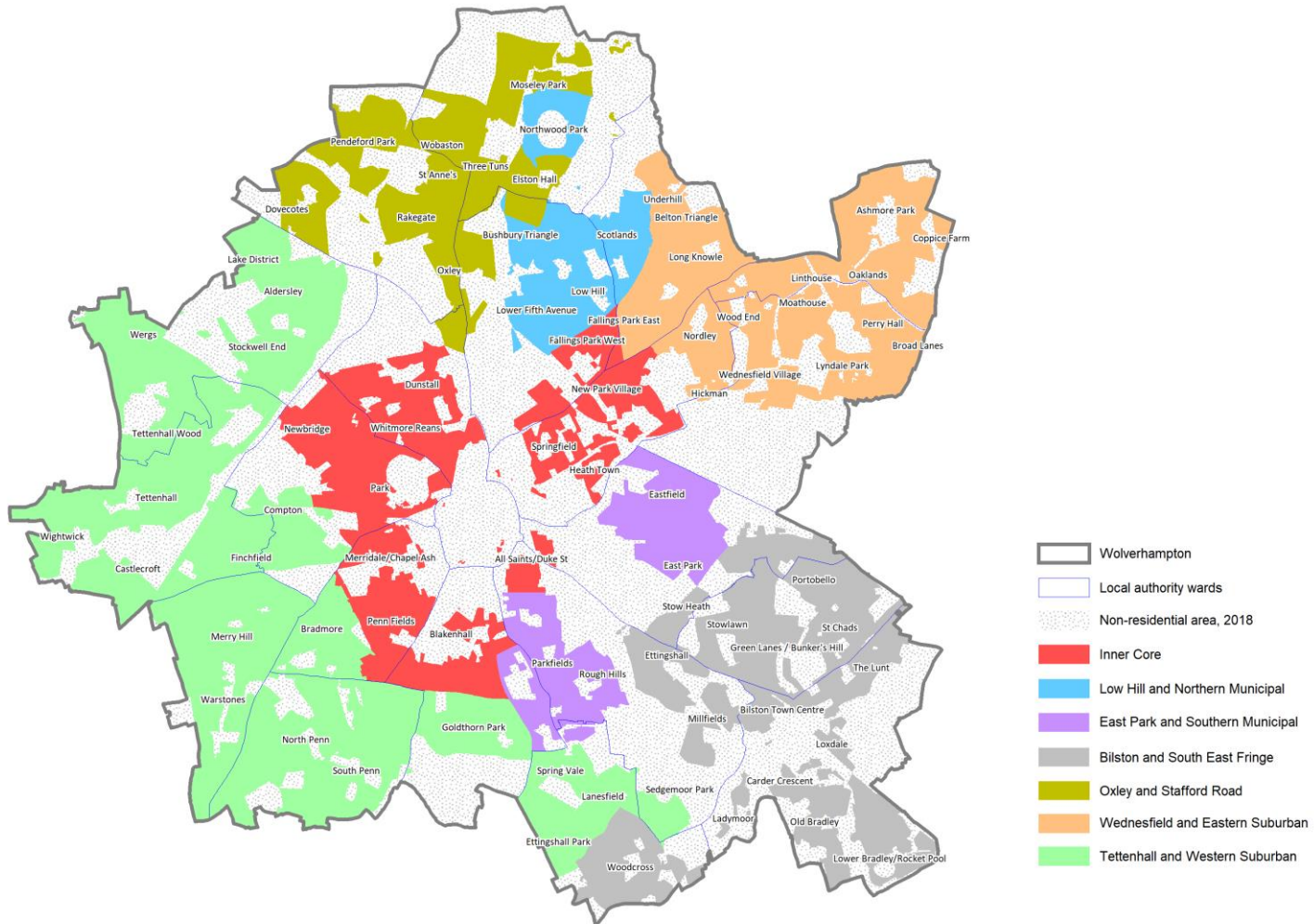


Figure 27 Residential sub-areas of Wolverhampton

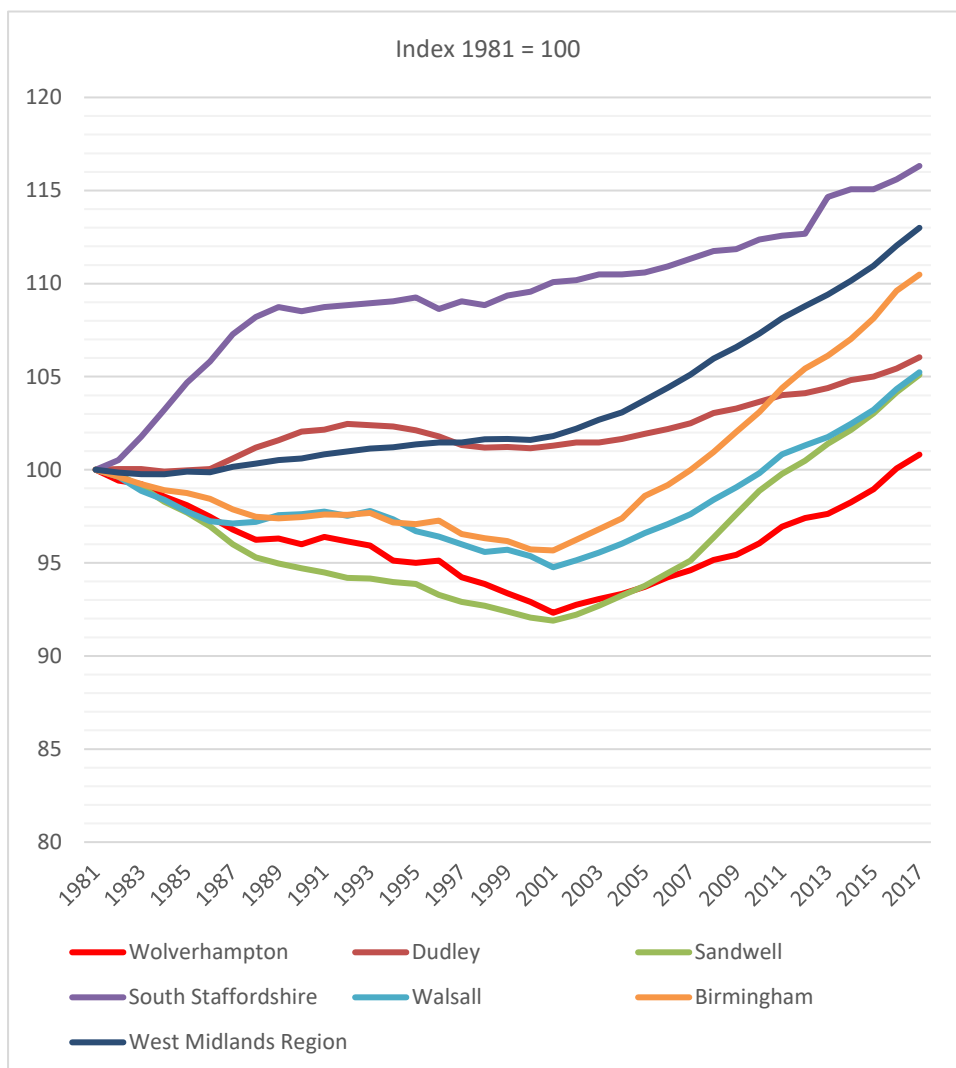


Contains adapted map data from ONS Under the Open Government Licence v.3.0. © Crown copyright and database rights 2019 Ordnance Survey 100019153. This map © 2019 arc4 Limited (Company No. 06205180).

5. Population and Household Change

5.1 The highest population recorded for Wolverhampton in its expanded area following local government reorganisation was 269,122 in 1971.⁴ By 2001 it declined to 236,582. Figure 28 uses mid-year population estimates to trace the trend over the period 1981 to 2017, when the Wolverhampton figure had recovered to 259,900. This is a net gain, but the smallest among the city’s neighbouring and comparator areas.

Figure 28 Total population 1981 to 2017



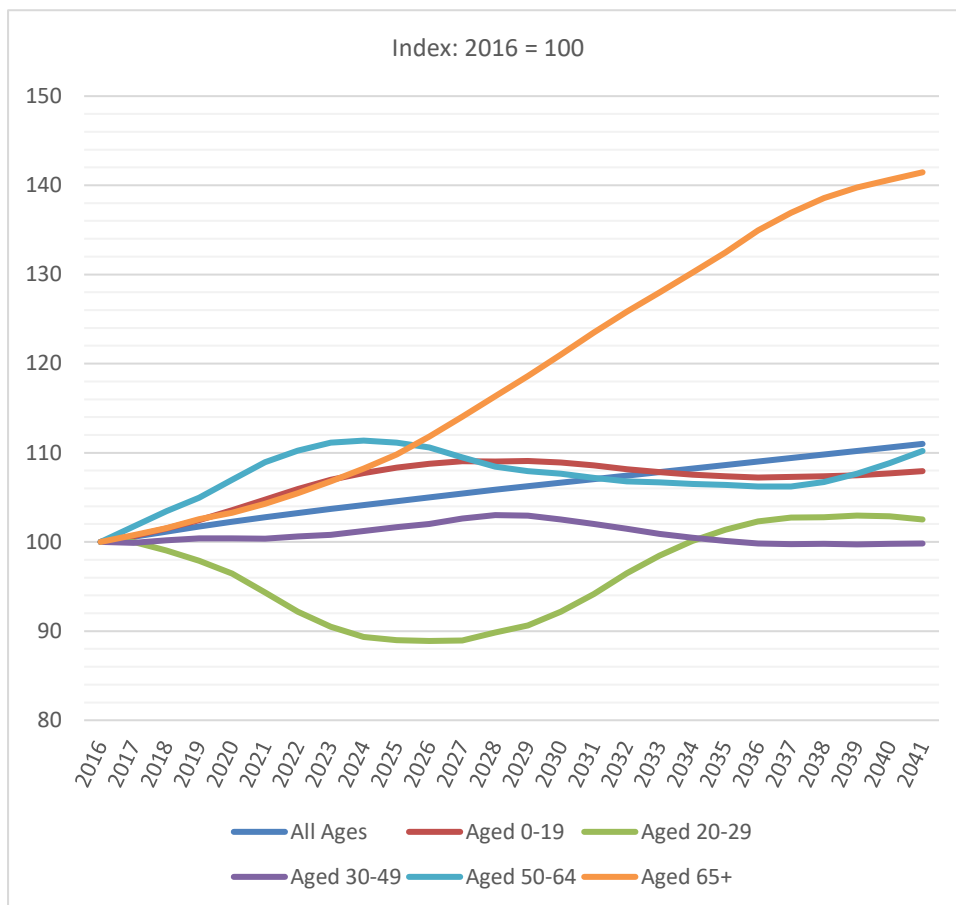
Source: Population estimates - local authority based by five-year age band via NOMIS. © Crown copyright: Adapted data from ONS under the Open Government Licence v.3.0.

5.2 The city is projected to pass the previous 1971 population peak in 2025 and reach 286,400 by 2041. The structure of housing need and demand will continue to change

⁴ The incorporation of Bilston, Wednesfield, most of historic Tettenhall and parts of Coseley and Sedgley into Wolverhampton in 1966 nearly doubled its land area. The population of core Wolverhampton had fallen from a peak of 162,672 in 1951 to 150,825 in 1961.

sharply. The key household-forming 20-29 age group will fall 4,000 by 2026 (Figure 29). The 65+ population will rise 12,000 by 2033, with the 575 yearly household growth to 2041 confined to the over-44s (Table 5).

Figure 29 Population Projection by age, 2016 to 2041: Wolverhampton



Population projections—local authority based by single year of age, ONS Crown Copyright Reserved [from Nomis on 27 January 2019].

Table 5 Household projection by age, 2016 to 2041: Wolverhampton									
	Number of households								Total
	Under 25	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75 to 84	Over 85	
2016	3,834	15,028	18,614	21,911	16,567	13,239	10,530	4,547	104,270
2041	3,806	14,791	18,596	22,295	19,052	16,665	15,585	7,845	118,635
Difference	-28	-237	-18	384	2,485	3,426	5,055	3,298	14,365

ONS, 2016-based household projections for local authorities and higher administrative areas in England, Table 414: Household projections by age and district, mid-2016 and mid-2041. © Crown copyright: Adapted data from ONS under the Open Government Licence v.3.0.

5.3 In Wolverhampton there are a significant number of births each year to mothers who were born outside the UK. In 2014-16 these births accounted for 30.3% of all births. Additionally, high net international migration (4,217) between 2011 and 2017 has

driven Wolverhampton's increasing diversity and population growth (Table 7). The total BME population increased from 24.6% in 2001 to 35.5% in 2011 and will be significantly higher in 2019 (Table 3).

- 5.4 Wolverhampton has experienced population outflow to South Staffordshire and beyond (Table 6 and Figure 31 to Figure 32) although this also widens the city's effective area of influence. It has gained significantly from Birmingham and Sandwell in this period (Figure 30).

	Total moves from Wolverhampton 2013-17		Total moves to Wolverhampton 2013-17		Net moves 2013-17
	Number	% of all moves	Number	% of all moves	Number
Walsall	6,240	12.0	6,170	12.9	-70
South Staffordshire	6,240	12.0	4,460	9.3	-1,780
Birmingham	4,420	8.5	4,680	9.8	260
Dudley	4,380	8.4	4,020	8.4	-360
Sandwell	3,070	5.9	4,170	8.7	1,100
Shropshire	1,940	3.7	980	2.0	-960
Telford and Wrekin	1,700	3.3	1,030	2.1	-670
Cannock Chase	750	1.4	460	1.0	-290
Coventry	710	1.4	730	1.5	20
Stafford	630	1.2	430	0.9	-200
Manchester	610	1.2	540	1.1	-70
Nottingham	590	1.1	510	1.1	-80
Leicester	580	1.1	530	1.1	-50
Stoke-on-Trent	550	1.1	520	1.1	-30

Source: Internal migration - Matrices of moves between local authorities and regions (including the countries of Wales, Scotland and Northern Ireland), year ending June 2013 to 2017. © Crown copyright: Adapted data from ONS under the Open Government Licence v.3.0.

Indicator	Wolverhampton	Dudley	Sandwell	South Staffordshire	Walsall	Birmingham	West Midlands Region
2011 Population	249,470	312,925	308,063	108,131	269,323	1,073,045	5,601,847
2017 Population	259,926	319,419	325,460	111,890	281,293	1,137,123	5,860,706
2011-17 Population change (%)	4.2	2.1	5.6	3.5	4.4	6.0	4.6
Total households 2017	104,793	132,663	125,599	46,320	111,180	421,915	2,382,322
Long-Term International Migration: inflow total 2014-16	8,073	2,063	7,820	383	3,110	43,900	137,778
Long-Term International Migration: outflow total 2014-16	3,856	901	1,890	189	1,217	23,374	64,260
Long-Term International Migration: net total 2014-16	4,217	1,162	5,930	194	1,893	20,526	73,518
Long-Term International Migration: net total 2014-16 (% of 2016 population)	1.64	0.37	1.84	0.17	0.68	1.83	1.27
Births to non-UK born mothers (% of live births) 2014-16	30.3	13.5	32.9	4.4	21.0	40.4	24.7

Source: Census 2011 Table KS101EW; Population estimates - local authority based by single year of age via NOMIS; ONS Table 406: Household projections, mid-2001 to mid-2041. © Crown copyright: Adapted data from ONS under the Open Government Licence v.3.0.

Figure 30 Migration: Inflow to Wolverhampton 2013–17

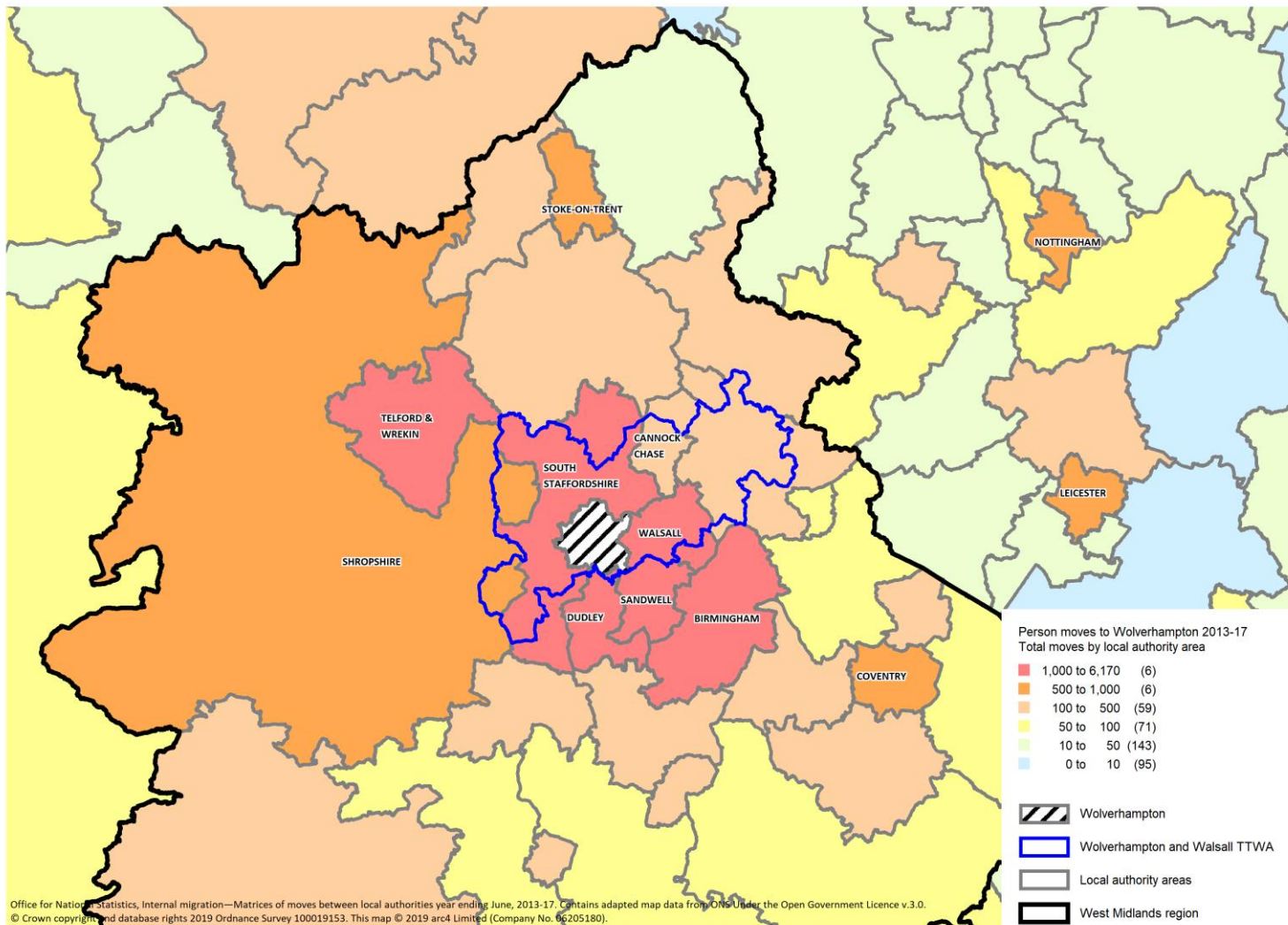


Figure 31 Migration: Outflow from Wolverhampton 2013–17

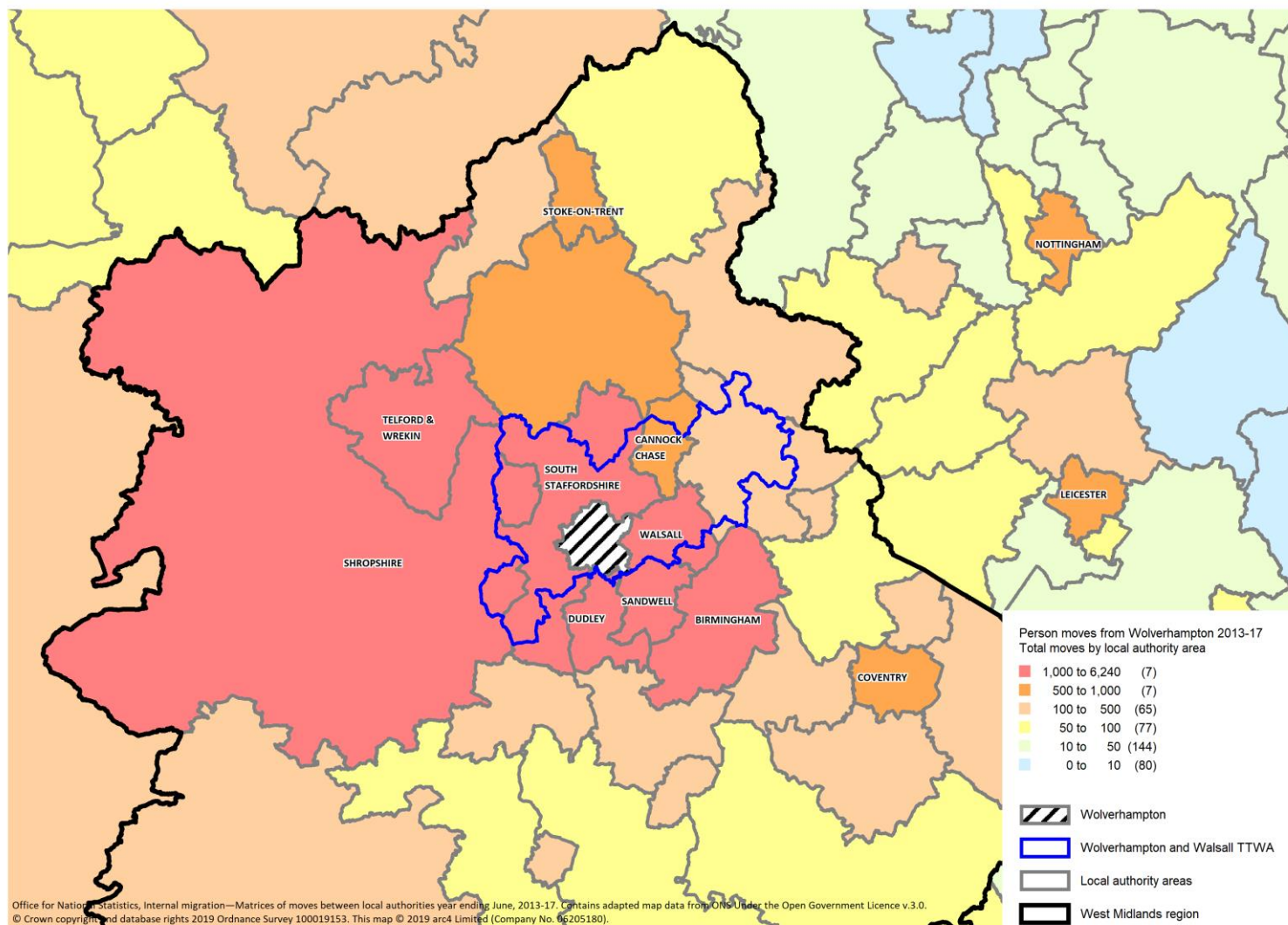


Figure 32 Migration: Net moves Wolverhampton 2013–17

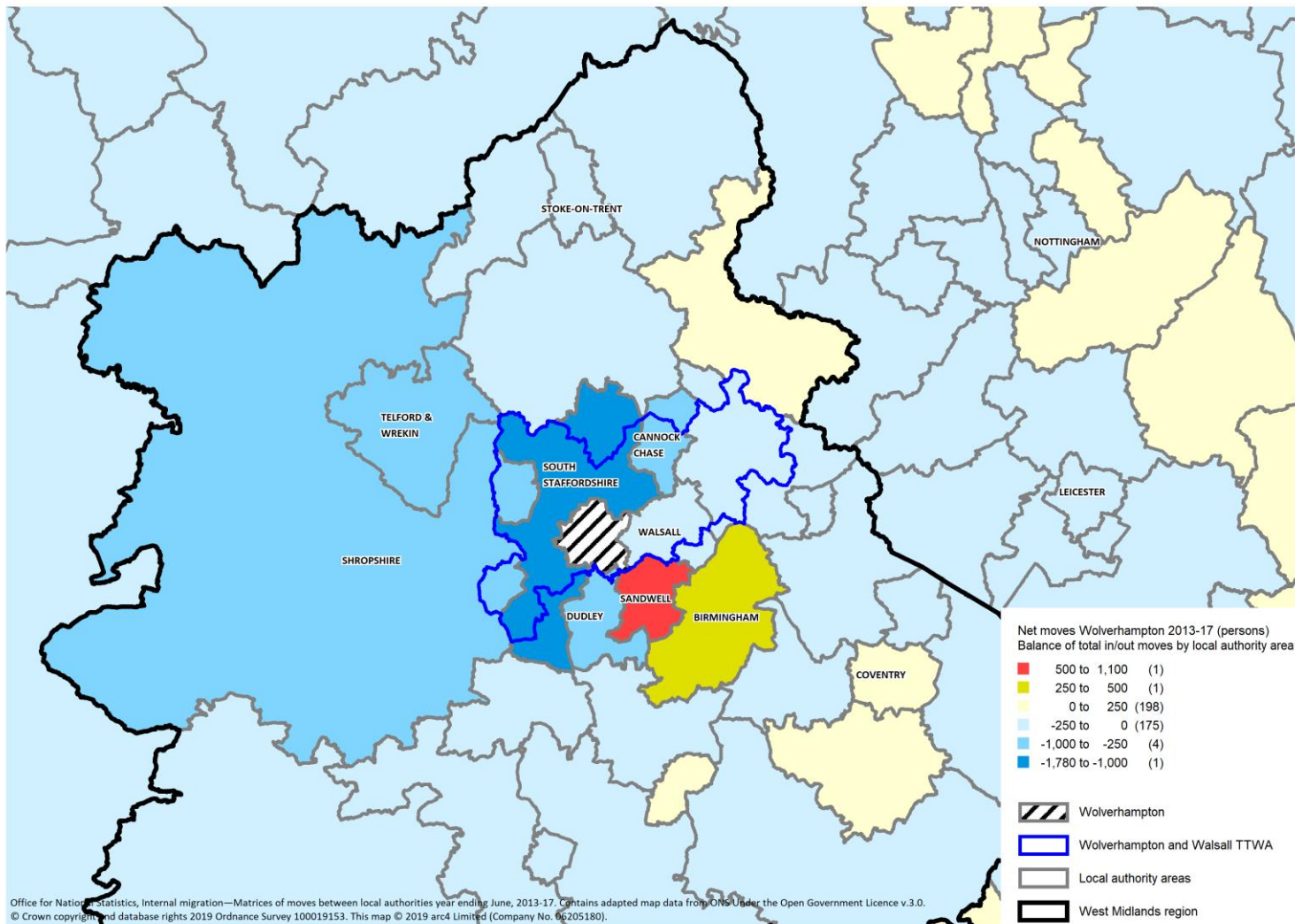
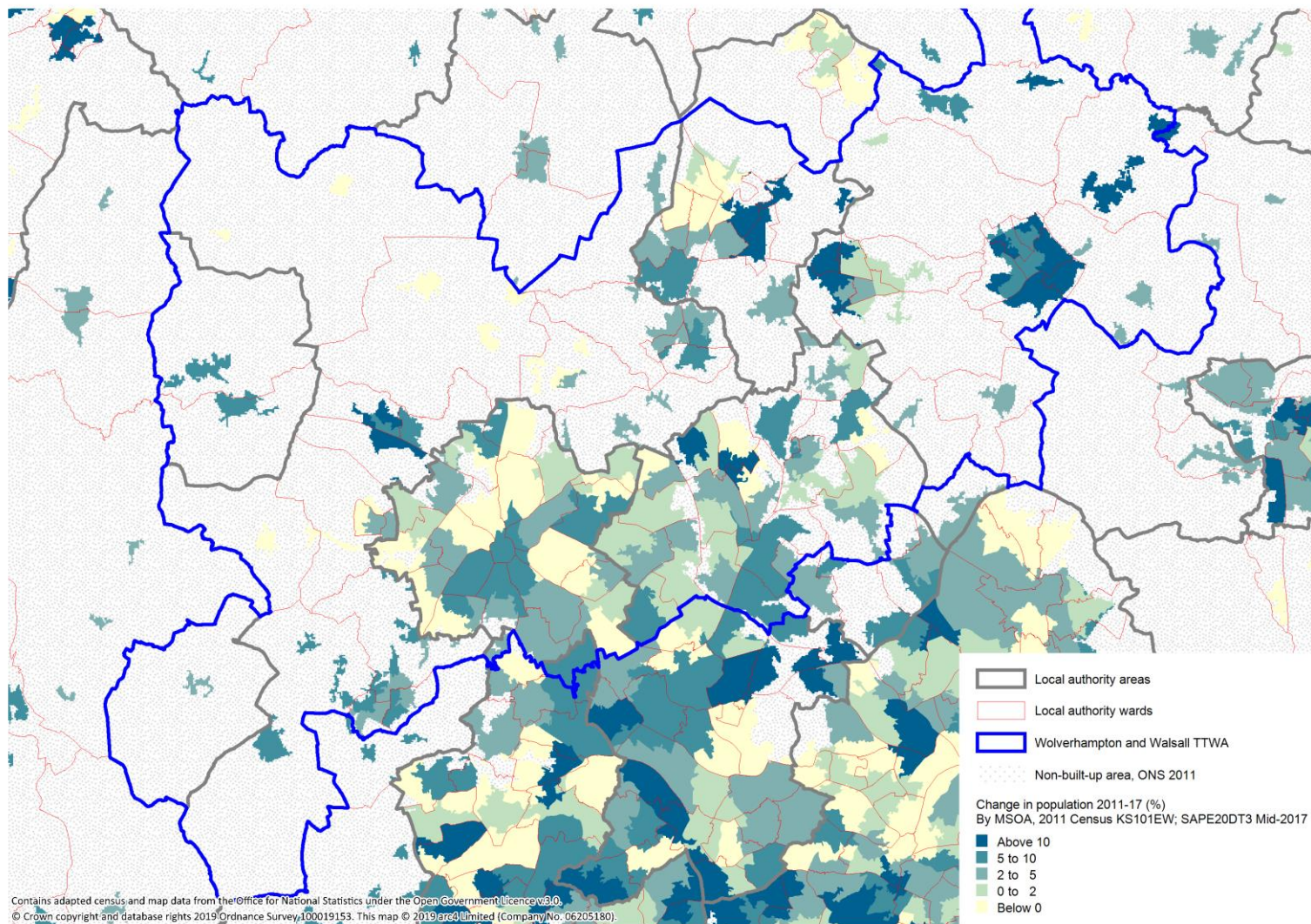


Figure 33 Population Change 2011-17



6. Housing Market Performance

- 6.1 This chapter examines the housing sale and rental markets in Wolverhampton. The median sale price in 2017 was £140,000 (Table 8) and the 2,600 private relets recorded by Zoopla attracted a median monthly rent of £524 (Table 9). Like the rest of the Black Country, both median and lower quartile (LQ) prices have lost ground compared to the regional average. Indeed, prices have fallen in Wolverhampton in real terms over the decade 2007 to 2017 (Table 10).
- 6.2 Figure 34 shows that higher prices are confined to the western suburban zone, where they continue to be above the regional average, in some areas at £270,000 in 2017—above 150% of the region (Figure 36 and Figure 37). Such neighbourhoods are among the most expensive localities in the conurbation. New build prices have tended to reflect these distinctions: above £203,000 in Tettenhall and below £130,000 in Bilston (Figure 39).
- 6.3 Real-terms price falls are widespread: down more than a quarter in Springfield, Penn Fields, Whitmore Reans and parts of Bilston (
- 6.4 Figure 38). Median prices in such areas are now less than half the regional average. But prices have also risen sharply in other parts of Bilston such as its town centre and in the Bradley area and this may reflect major local new build activity (Figure 9 and Figure 39).
- 6.5 The Zoopla dataset reveals how widespread private renting now is across the city (Figure 40). It extends beyond the 2011 concentrations such as Park (Figure 14) and the PRS Housing Benefit profile (Figure 24) indicating the sector caters for several income segments. Rental values for both houses and flats match the sale price hierarchy and neighbourhood typologies mapped for Wolverhampton (Figure 41 and Figure 42).
- 6.6 Low house prices in the inner core and the notably low resale prices of ex-RTB stock in council-built areas provide the highest yields to private landlords, at both median (Figure 43) and LQ rents (Figure 44). Thus, the fit between yields above 7% and social rented neighbourhoods is nearly perfect (see earlier Figure 12). High yields similarly occur in areas with high reliance on PRS HB such as Dunstall and Park Village. The high yield low value neighbourhoods have a high incidence of Housing Benefit support illustrating that these dwellings are catering for a high level of need that would have been catered for in a larger social sector in the latter half of the 20th Century. The lower quartile rent/ high yield private rented sector now has a social housing function and a substantial public subsidy through Housing Benefit.

Table 8 Residential property price paid: Wolverhampton 2007 and 2017				
	Lower Quartile		Median	
	2007	2017	2007	2017
Detached	£162,500	£185,000	£219,500	£224,950
Semi-detached	£110,000	£117,665	£127,500	£140,000
Terraced	£87,000	£89,623	£107,000	£118,250
Flat or maisonette	£82,000	£63,000	£101,450	£80,000
Total	£97,000	£106,500	£122,000	£140,000

Source: ONS HPSSA Dataset 9 Median price paid for administrative geographies; HPSSA Dataset 15 LQ price paid for administrative geographies. © Crown copyright: Adapted data from ONS under the Open Government Licence v.3.0.

Table 9 Monthly rentals value: Wolverhampton 2017			
	Flat	House	Total
Percentile 25	£399	£494	£425
Median	£477	£576	£524
Percentile 75	£550	£650	£598
Count	1,243	1,340	2,583
Median relet weeks	7	7	7

Source: © Zoopla 2019 Marketview.

Indicator	Wolverhampton	Dudley	Sandwell	South Staffordshire	Walsall	Birmingham	West Midlands Region
Median price paid 2007 (£)	122,000	134,950	121,995	183,250	125,000	137,500	147,000
Median price paid 2017 (£)	140,000	158,000	138,000	217,500	149,250	164,000	180,000
Lower Quartile (LQ) price paid 2007 (£)	97,000	108,950	102,000	143,000	100,000	113,000	114,950
LQ price paid 2017 (£)	106,500	122,500	122,500	165,000	115,000	125,000	133,000
Median price paid 2007 (£) at 2017 prices (GDP deflator)	145,209	160,622	145,203	218,111	148,779	163,657	174,965
LQ price paid 2007 (£) at 2017 prices	115,453	129,676	121,404	170,204	119,024	134,497	136,818
Median real terms price change 2007-17 (%)	-3.6	-1.6	-5.0	-0.3	0.3	0.2	2.9
LQ real terms price change 2007-17 (%)	-7.8	-5.5	0.9	-3.1	-3.4	-7.1	-2.8
Median price paid index (WMR = 100) 2007	83.0	91.8	83.0	124.7	85.0	93.5	100.0
Median price paid index (WMR = 100) 2017	77.8	87.8	76.7	120.8	82.9	91.1	100.0
LQ price paid index (WMR = 100) 2007	84.4	94.8	88.7	124.4	87.0	98.3	100.0
LQ price paid index (WMR = 100) 2017	80.1	92.1	92.1	124.1	86.5	94.0	100.0
Median price paid index (E&W = 100) 2007	69.7	77.1	69.7	104.7	71.4	78.6	84.0
Median price paid index (E&W = 100) 2017	61.3	69.1	60.4	95.2	65.3	71.8	78.8
LQ price paid index (E&W = 100) 2007	77.6	87.2	81.6	114.4	80.0	90.4	92.0
LQ price paid index (E&W = 100) 2017	71.5	82.2	82.2	110.7	77.2	83.9	89.3

Source: ONS HPSSA Dataset 9 Median price paid for administrative geographies; HPSSA Dataset 15 LQ price paid for administrative geographies; HM Treasury GDP deflator.
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Figure 34 Median House Price 2017

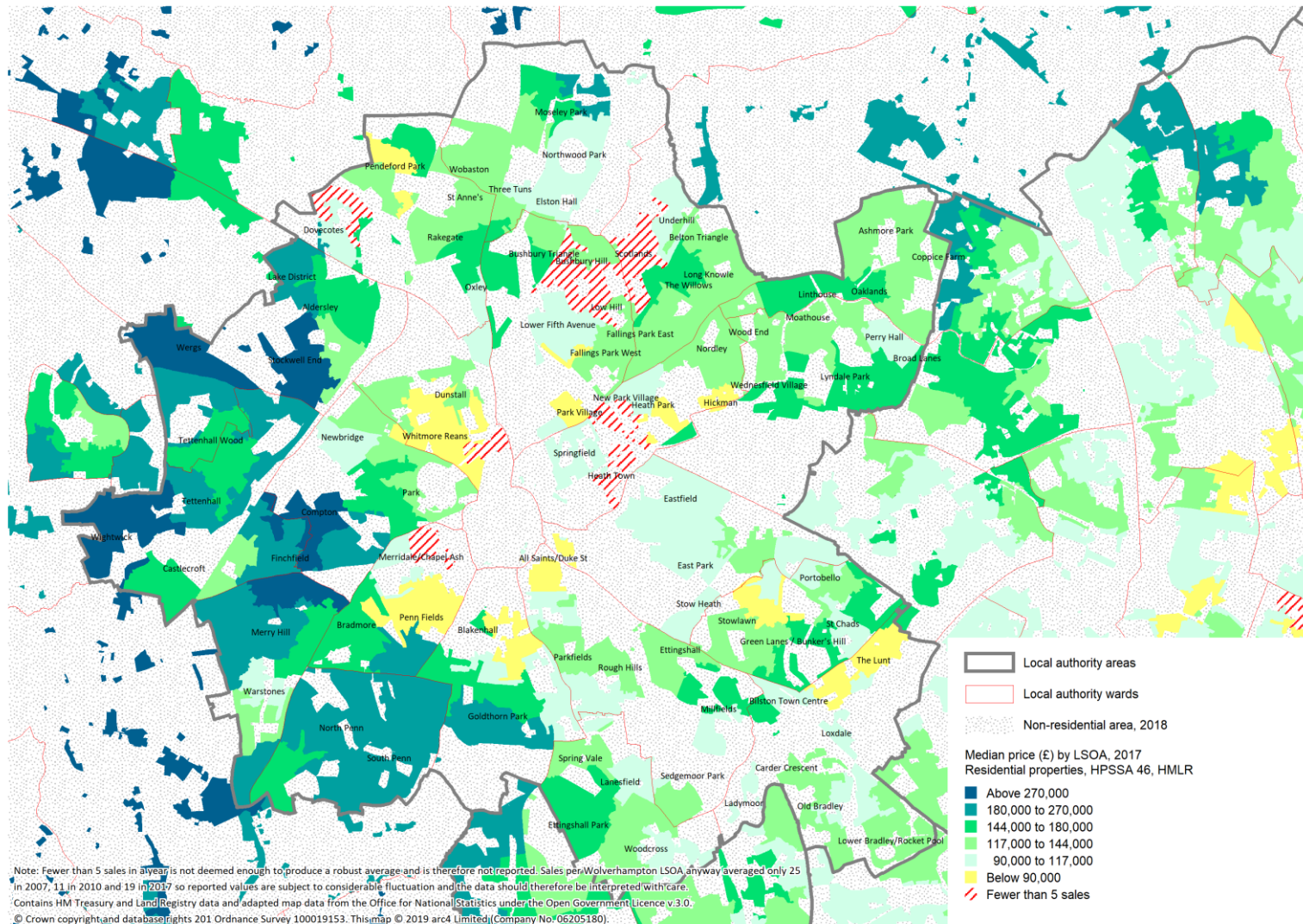


Figure 35 Lower Quartile House Price 2017

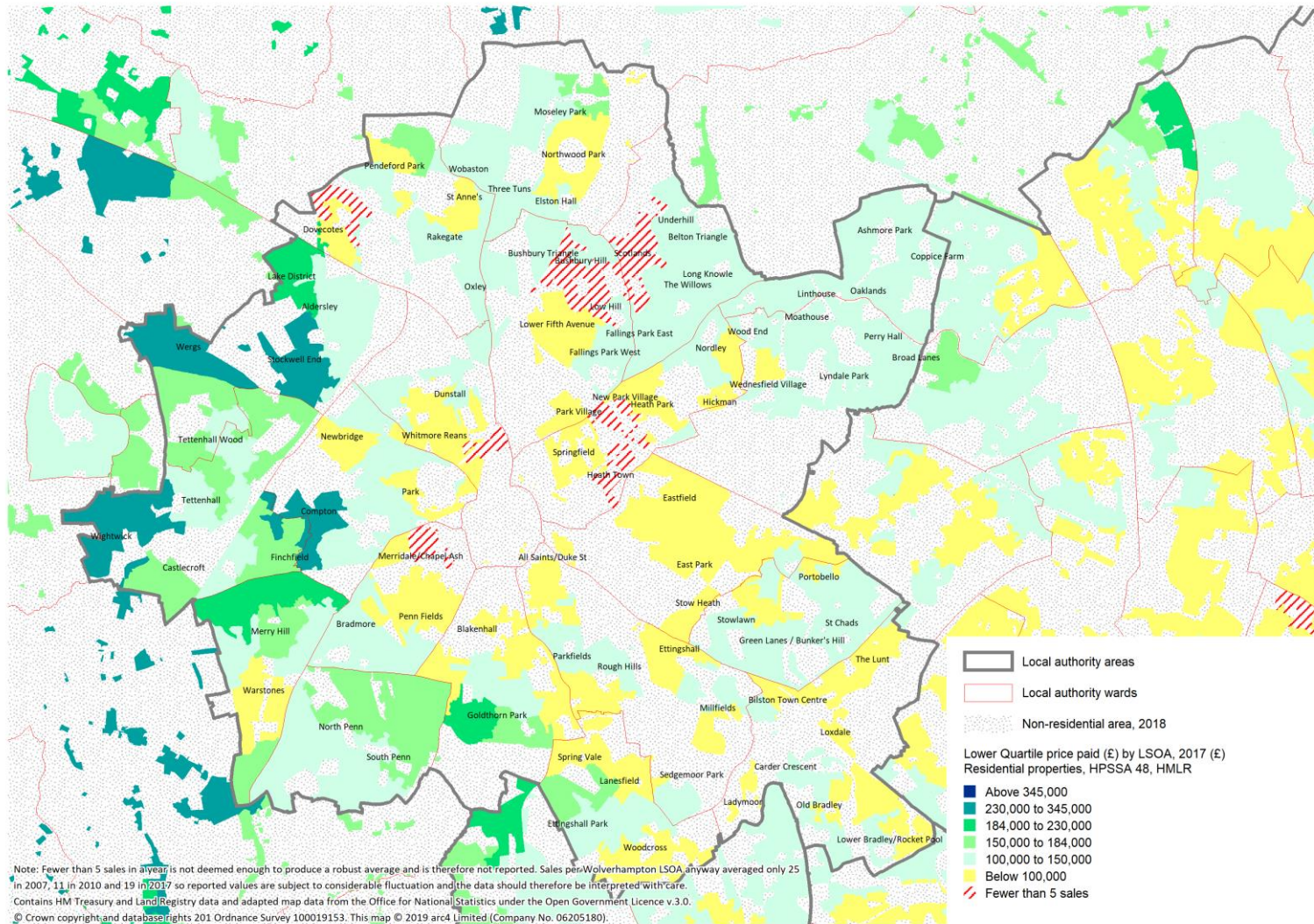


Figure 36 Indexed Median House Prices 2007

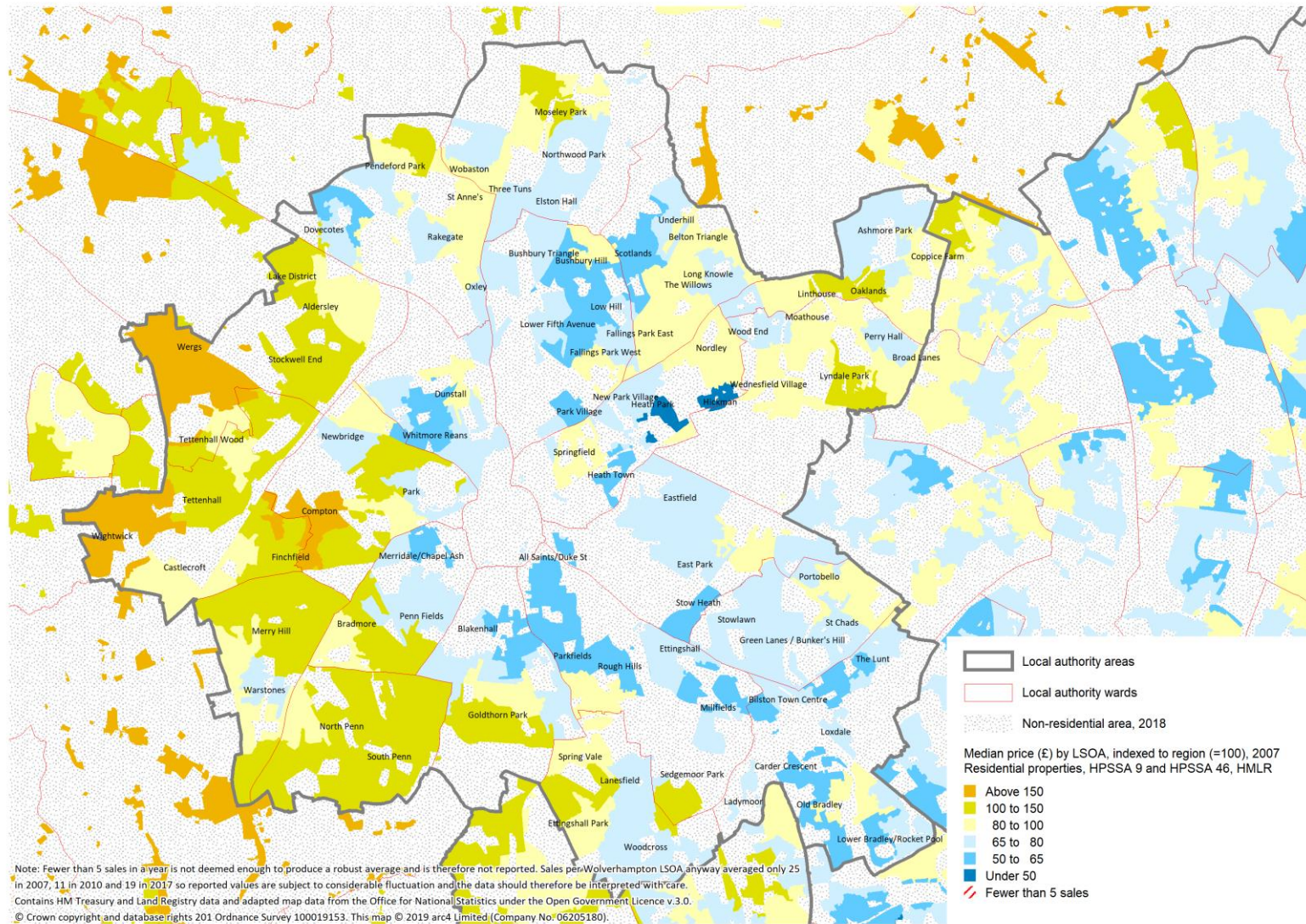


Figure 37 Indexed Median House Prices 2017

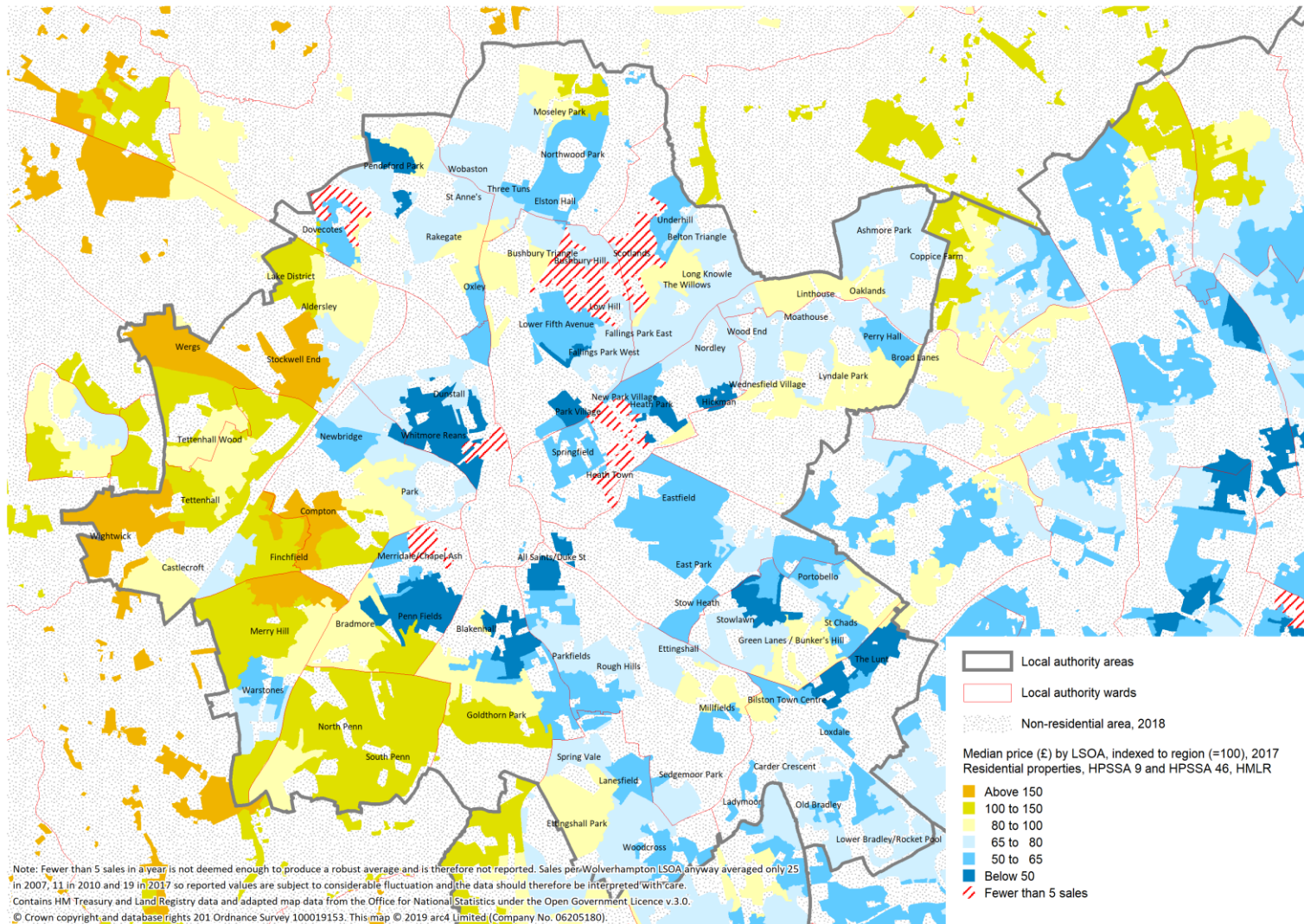


Figure 38 Median Real-terms House Price Change 2007-17

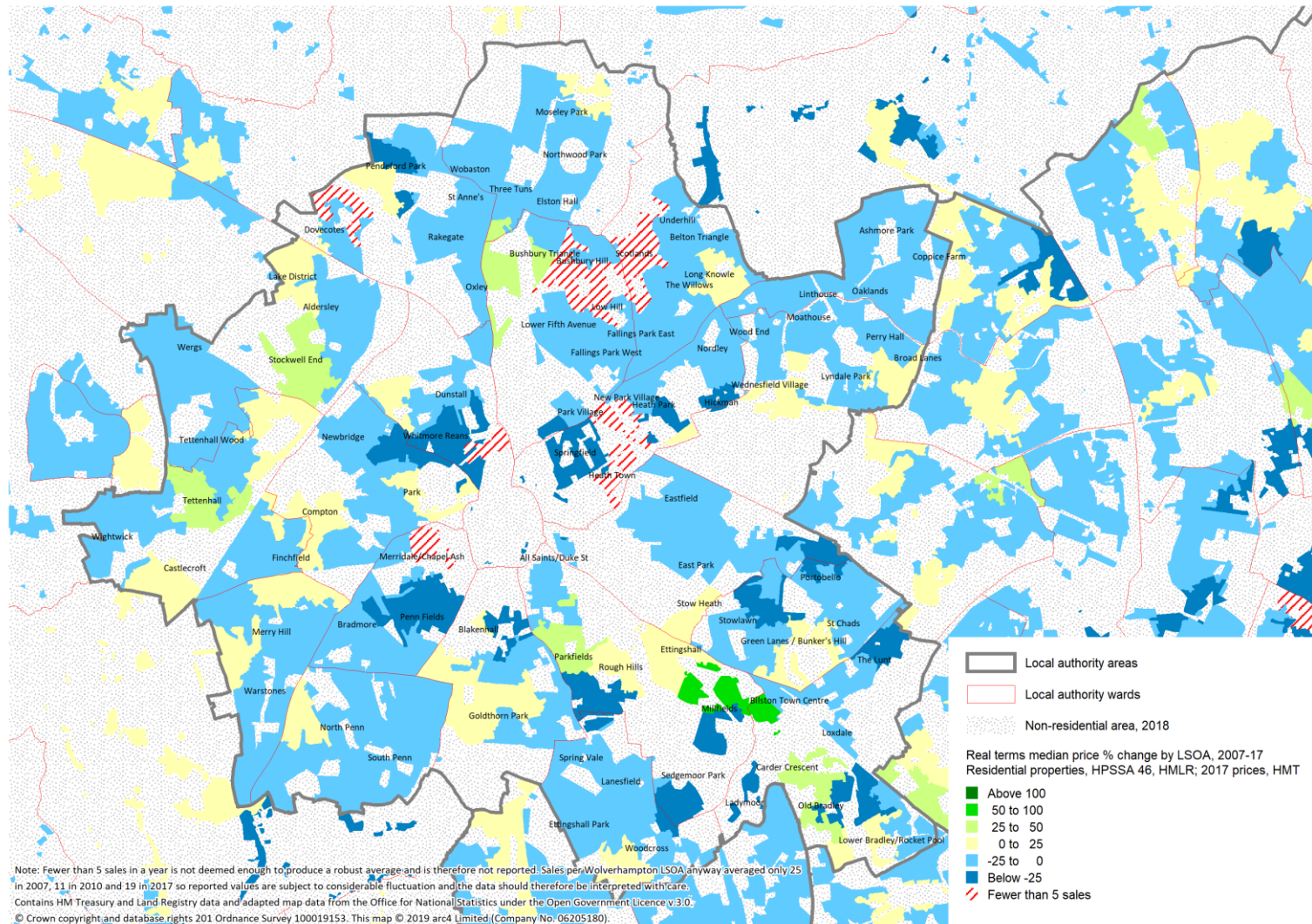
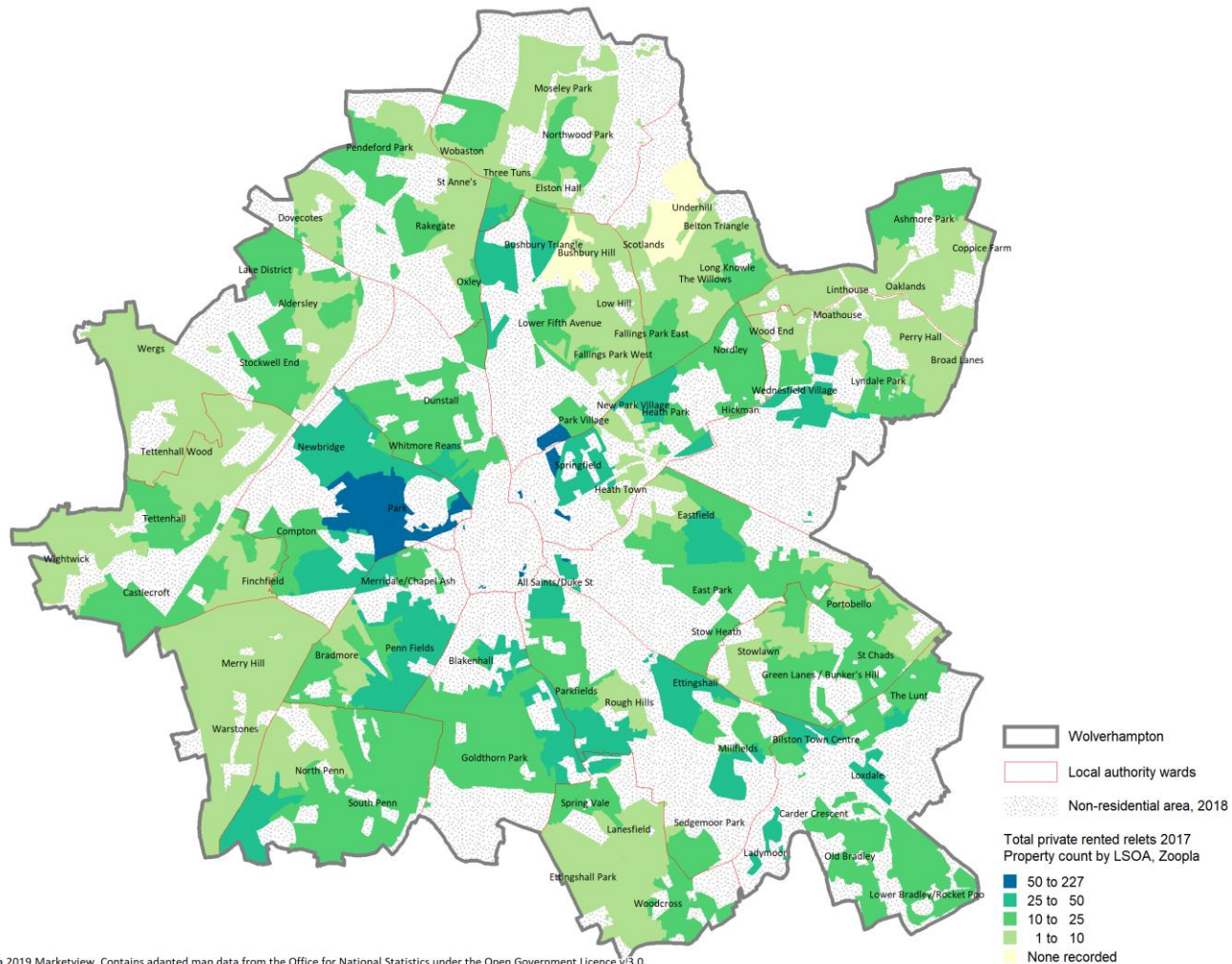
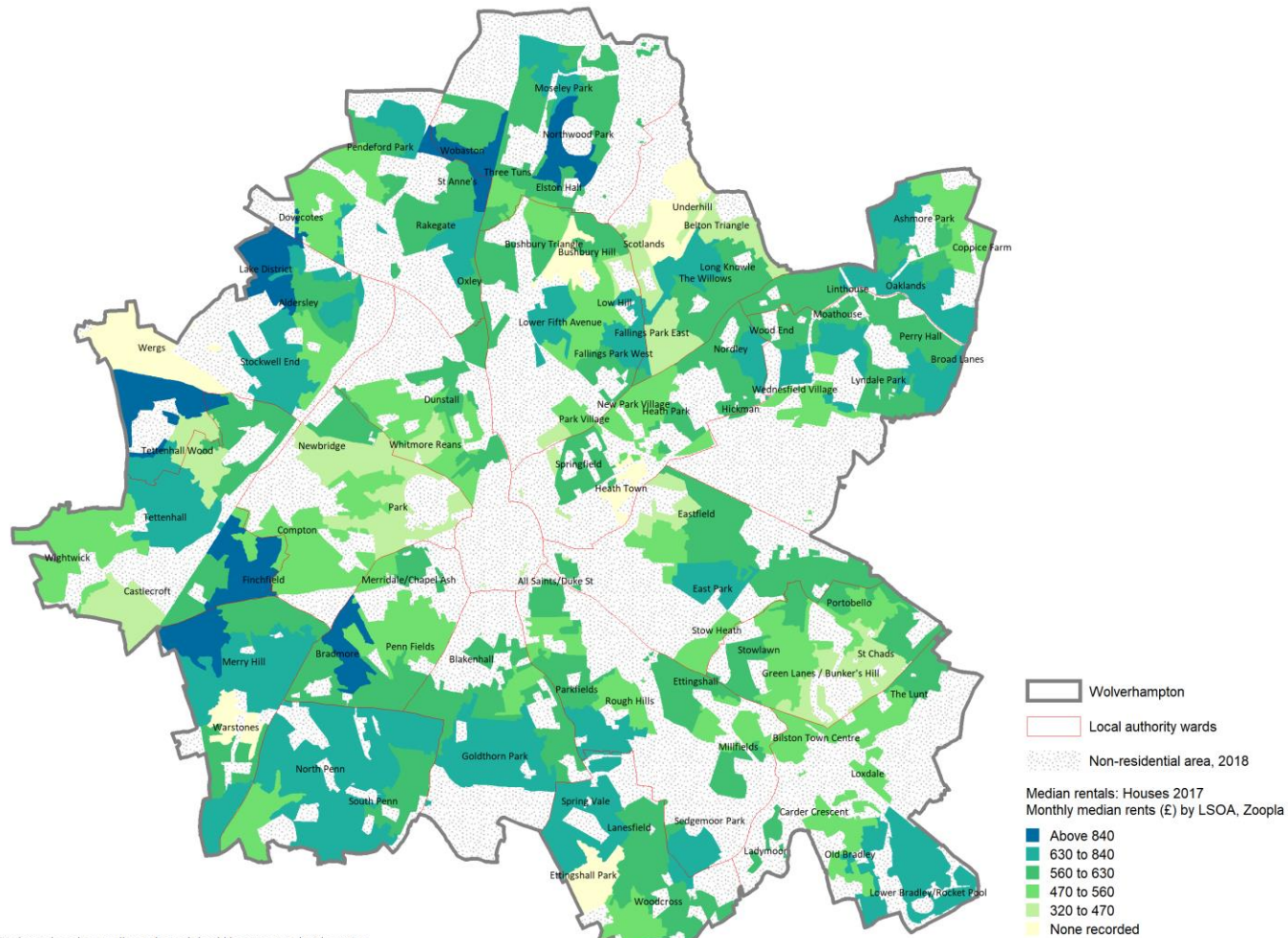


Figure 40 Total Private Rented Relets 2017



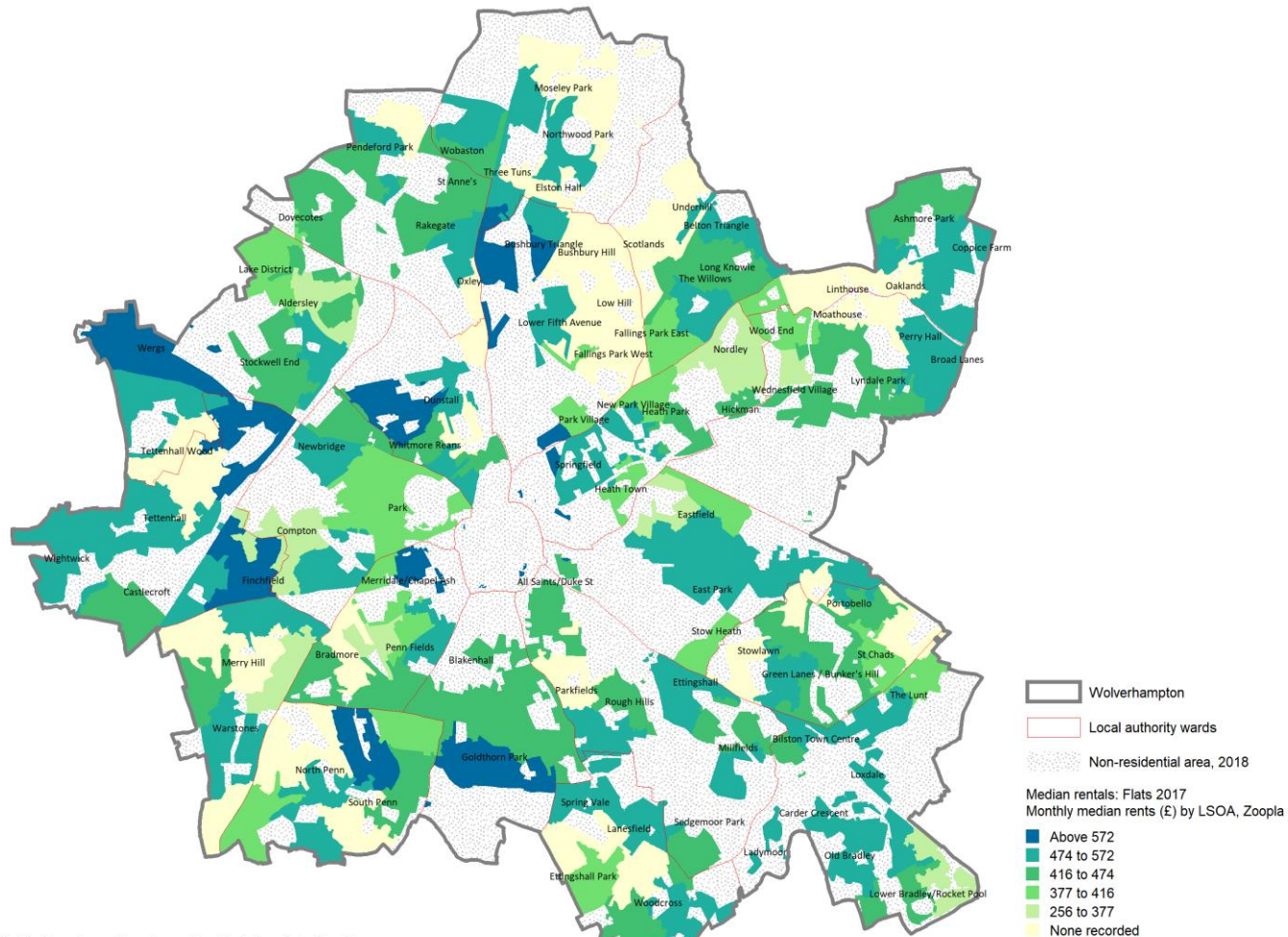
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Figure 41 Private Rented Houses: Median Rents 2017



Note: LSOA data is based on small samples and should be interpreted with caution.
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Figure 42 Private Rented Flats: Median Rents 2017



Note: LSOA data is based on small samples and should be interpreted with caution.
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Figure 44 Lower Quartile Yield: Total PRS stock 2017

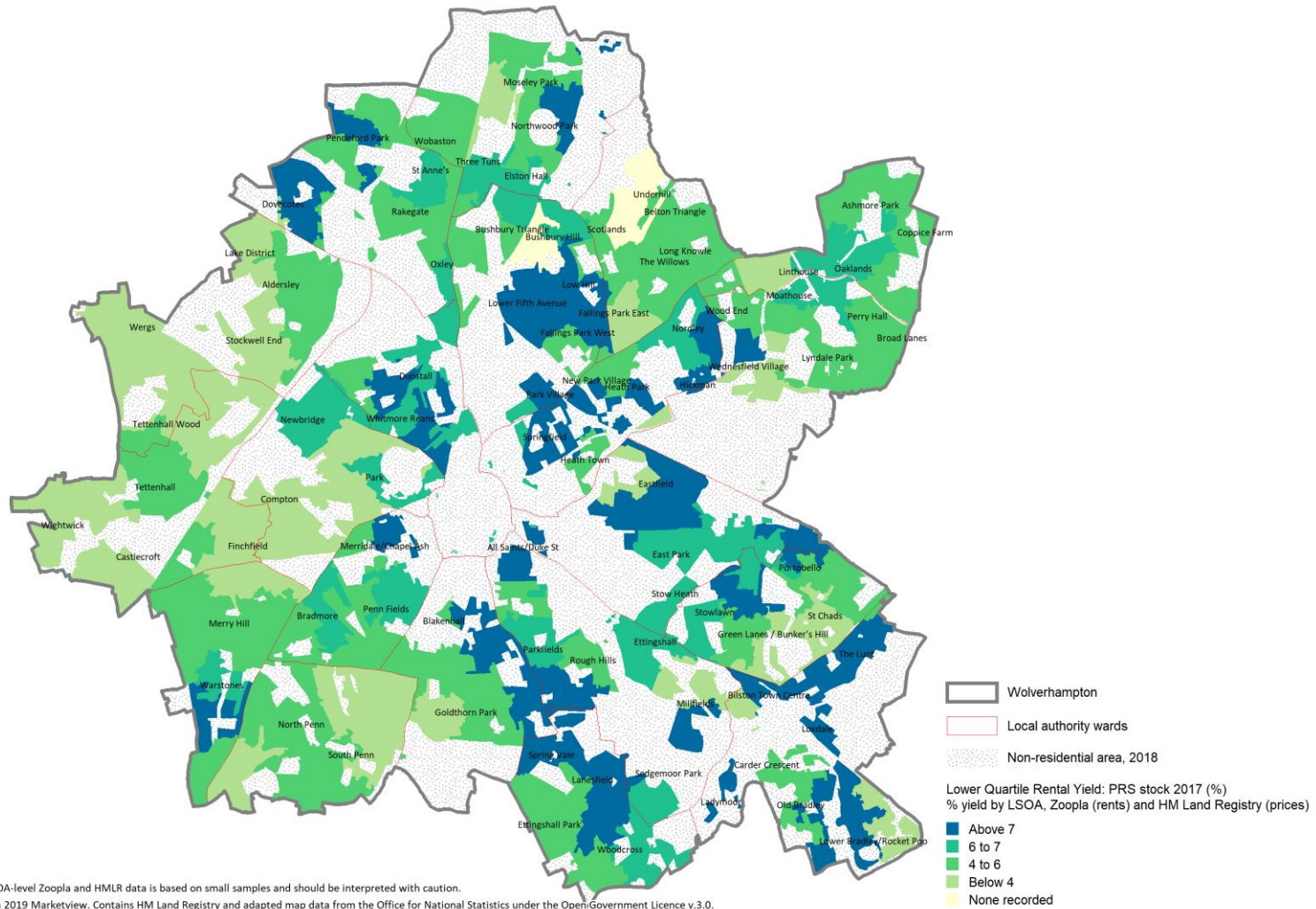
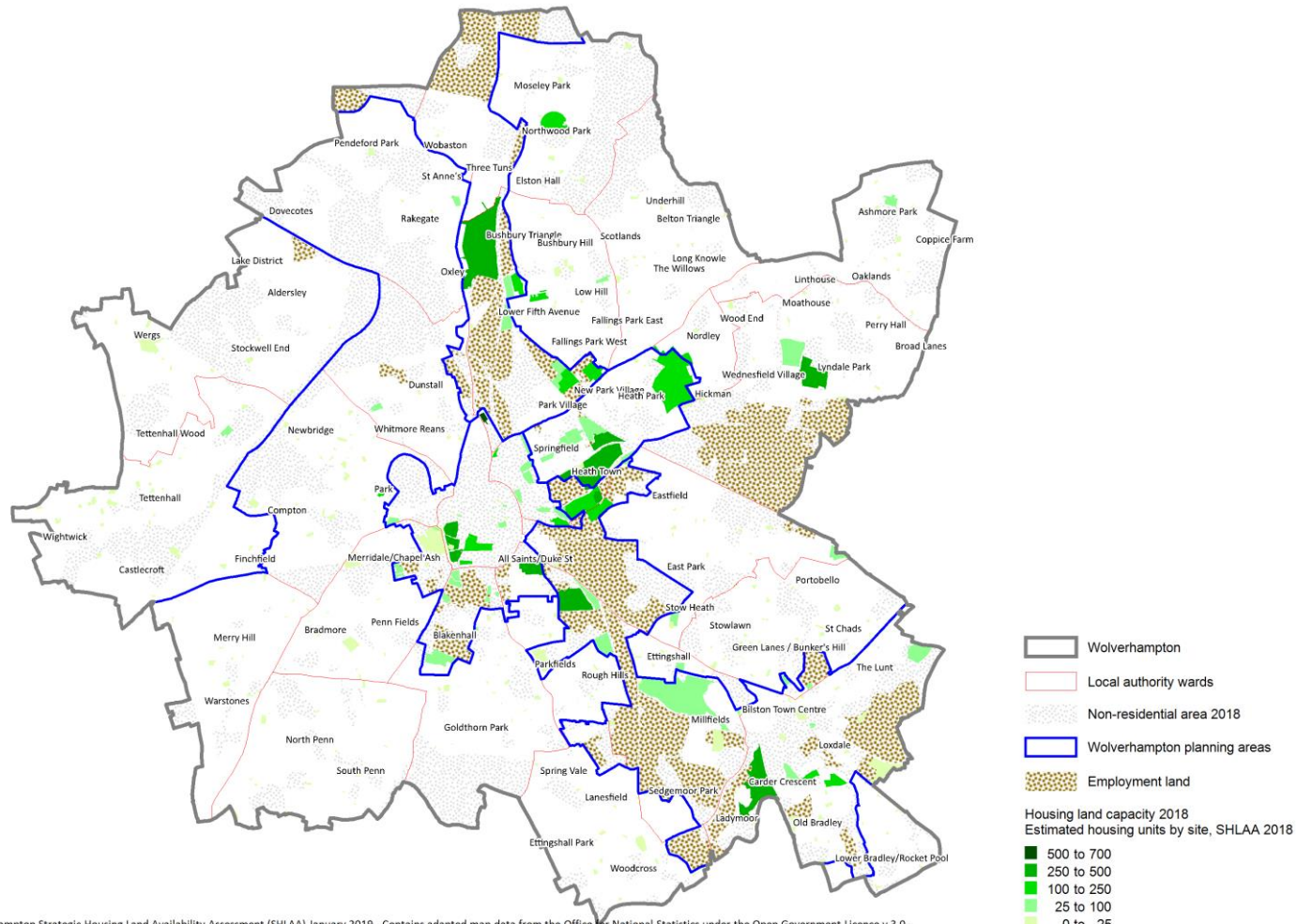


Figure 45 Housing Land Availability 2018



Wolverhampton Strategic Housing Land Availability Assessment (SHLAA) January 2019. Contains adapted map data from the Office for National Statistics under the Open Government Licence v.3.0. © Crown copyright and database rights 2019 Ordnance Survey 100019153. This map © 2019 arc4 Limited (Company No. 06205180).

7. Future Dwelling Requirements

Introduction

- 7.1 The purpose of this section is to set out the methodology to establish future dwelling type and size mix across Wolverhampton. It presents the baseline data used as a starting point for the analysis and how data are interpreted to establish a reasonable view on dwelling type and mix at district level.
- 7.2 There are three main data sources which provide the starting point for the analysis: household projections, dwelling stock information and national estimates of the relationships between households and dwellings derived from arc⁴ household surveys.
- 7.3 CLG Household projections are used to establish the number of households by Household Reference Persons (HRP) and household type using the latest (currently 2014-based) data and how this is expected to change over a specified period. The analysis focuses specifically on Local Plan periods and therefore analysis has been run using household projection data for 2018 to 2036.
- 7.4 The change in the number of households over this period can be established and, assuming that the dwelling needs of these households do not change significantly over the Plan Period, the potential impact on type/size of dwellings can be determined.
- 7.5 The latest Valuation Office Agency (VOA) data provides a summary of dwelling type (house, flat, bungalow) and size (number of bedrooms) as at September 2018.

Relationship between households and dwellings

- 7.6 arc⁴ has prepared data on the relationship between the age of Household Reference Person, household type and dwellings occupied by type and size. This is a unique secondary data source and has been derived from amalgamating household survey data from around 40,000 households. The data available is summarised in **Table 11**.

Age group of Household Reference Person	Household (HH) type	Dwelling type	Dwelling size
15_24	One Person	1 Bed House	1 Bedroom
25_34	Couple only	2 Bed House	2 Bedrooms
35_44	HH with 1/2 Child(ren)	3 Bed House	3 Bedrooms
45_59	HH with 3 Children	4 or more bed House	4+ Bedrooms
60_84	Other Multi-person	1 Bed Flat	All
85+	All	2 Bed Flat	
All		3+ Bed flat	
		1 Bed Bungalow	
		2 Bed Bungalow	
		3+ Bed Bungalow	
	All		

Source: arc⁴ household surveys

- 7.7 For each age group, the proportion of HRPs by household type living in different type/size and size of dwelling has been calculated. **Table 12** provides an example of the data for the 15-24 age group. Further analysis considers the relationship between age and household type with what moving households within those groups would like/aspire to move to and expect to move to.

Applying the data at city level

- 7.8 Applying the data at city level is done in a systematic way. Firstly, the change in the number of households by age group and household type is established from household projections. Assuming that the dwelling needs of these households do not change over the Plan Period, the overall impact on type/size of dwellings can be determined. **Table 13** presents the baseline demographic data for Wolverhampton. This illustrates that the total number of households is expected to increase by around 12,500 over the remainder of the plan period 2018-2036 according to 2014-based DCLG household projections⁵. Analysis however indicates an absolute decline in households where the HRP is aged 15-34. The most substantial growth is in households where the HRP is aged between 60-84 years old and 85+.

⁵ Note that 2016-based household projection data was published in late 2018 but Government advice is to use previous 2014-based projections in housing need calculations

Table 12 Illustration of the relationship between dwelling type/size and household type by age group (15 to 24-year age group used)

HRP Age group	Dwelling type/size	Household type					Total
		One Person	Couple only	HH with 1/2 Children	HH with 3 Children	Other Multi-person	
15-24	1 Bed House	0.4	3.0	0.0	0.0	0.0	1.0
	2 Bed House	13.4	22.1	58.1	18.9	14.6	25.7
	3 Bed House	14.1	17.0	27.3	72.6	11.0	18.5
	4/4+ Bed House	0.0	1.2	0.9	6.9	46.9	12.7
	1 Bed Flat	63.5	27.5	0.2	0.0	0.0	22.0
	2 Bed Flat	6.1	26.3	13.0	0.0	24.1	17.8
	3+ Bed Flat	0.2	0.1	0.3	1.6	3.5	1.1
	1-2 Bed Bungalow	2.4	0.3	0.0	0.0	0.0	0.6
	3+ Bed Bungalow	0.0	0.0	0.1	0.0	0.0	0.0
	1 Bed Other	0.0	0.0	0.0	0.0	0.0	0.0
	2 Bed Other	0.0	2.4	0.0	0.0	0.0	0.7
	3+ Bed Other	0.0	0.0	0.0	0.0	0.0	0.0
Total		100.0	100.0	100.0	100.0	100.0	100.0
HRP Age group	Dwelling type/size	Household type					Total
		One Person	Couple only	HH with 1/2 Children	HH with 3 Children	Other Multi-person	
15-24	1	64.3	30.6	0.2	0.0	0.0	23.1
	2	21.4	51.0	71.1	18.9	38.6	44.6
	3	14.3	17.2	27.7	74.2	14.5	19.6
	4/4+	0.0	1.2	0.9	6.9	46.9	12.7
	Total		100.0	100.0	100.0	100.0	100.0

Source: arc⁴ surveys

Table 13A Change in number of households by age group 2018-2036				
Age group	Household Type	Year		Change in households 2018-2036
		2018	2036	
15-24	One Person	1,345	1,426	81
	Couple only	311	209	-102
	HH with 1/2 children	2,076	3,190	1,114
	HH with 3 children	138	186	48
	Other Multi-person	297	129	-168
	Total	4,167	5,140	973
25-34	One Person	3,878	3,633	-245
	Couple only	1,976	1,433	-543
	HH with 1/2 children	6,399	5,609	-790
	HH with 3 children	1,552	1,129	-423
	Other Multi-person	1,434	1,798	364
	Total	15,239	13,602	-1,637
35-44	One Person	4,333	5,542	1,209
	Couple only	1,418	1,312	-106
	HH with 1/2 children	9,902	12,333	2,431
	HH with 3 children	2,675	2,748	73
	Other Multi-person	1,350	1,645	295
	Total	19,678	23,580	3,902
45-59	One Person	8,365	9,196	831
	Couple only	4,152	2,191	-1,961
	HH with 1/2 children	9,224	11,222	1,998
	HH with 3 children	1,139	1,340	201
	Other Multi-person	7,613	7,300	-313
	Total	30,493	31,249	756
60-84	One Person	12,984	13,695	711
	Couple only	11,902	14,143	2,241
	HH with 1/2 children	1,032	1,745	713
	HH with 3 children	61	65	4
	Other Multi-person	6,404	8,205	1,801
	Total	32,383	37,853	5,470
85+	One Person	3,072	4,539	1,467
	Couple only	823	1,398	575
	HH with 1/2 children	57	175	118
	HH with 3 children	2	1	-1
	Other Multi-person	755	1,654	899
	Total	4,709	7,767	3,058

Continued overleaf/...

Age group	Household Type	Year		Change in households 2018-2036
		2018	2036	
ALL	One Person	33,979	38,028	4,049
	Couple only	20,582	20,685	103
	HH with 1/2 children	28,689	34,274	5,585
	HH with 3 children	5,566	5,469	-97
	Other Multi-person	17,851	20,729	2,878
	Total	106,668	119,185	12,517

Source: DCLG 2014-based household projections (subject to rounding).

7.9 **Table 14** applies the national data on dwelling occupancy to the demographic trends in Wolverhampton. The two right hand columns indicate the likely change in demand for dwelling types and sizes and how this translates to an overall percentage change in dwelling requirement. Analysis indicates that the majority of need will be for 3-bedroom (32.4%) and 4 or more-bedroom (17.6%) followed by 1/2-bedroom houses (14.7%). Regarding dwelling type, analysis suggests a broad split of 66.5% houses, 17.3% flats, 15.4% bungalows (or level-access accommodation), and 0.8% other (for instance self/custom build and specialist accommodation).

Dwelling type/size	Age group of Household Reference Person						Total	% change
	15-24	25-34	35-44	45-59	60-84	85+		
1 Bed House	9	-26	43	9	55	13	103	0.8
2 Bed House	250	-424	687	124	729	375	1,740	13.9
3 Bed House	180	-636	1,568	296	2,023	858	4,287	34.2
4 or more Bed House	124	-157	956	183	897	204	2,207	17.6
1 Bed Flat	214	-156	261	51	389	361	1,121	8.9
2 Bed Flat	173	-179	236	44	360	330	964	7.7
3+ Bed Flat	11	-17	37	5	28	28	93	0.7
1 Bed Bungalow	1	-6	10	6	156	168	336	2.7
2 Bed Bungalow	4	0	32	19	478	516	1,050	8.4
3+ Bed Bungalow	0	-8	47	17	316	171	543	4.3
1 Bed Other	0	-8	5	1	5	13	15	0.1
2 Bed Other	7	0	14	1	20	17	59	0.5
3+ Bed Other	0	-4	5	1	14	4	20	0.2
Total	973	-1621	3,901	757	5,470	3,058	12,538	100.0

Continued overleaf/...

Dwelling type/size	Age group of Household Reference Person						Total	% change
	15-24	25-34	35-44	45-59	60-84	85+		
1	225	-195	319	67	605	555	1,576	12.6
2	434	-603	970	187	1,587	1,238	3,814	30.4
3	190	-665	1,657	318	2,381	1,061	4,943	39.4
4 or more	124	-157	956	183	897	204	2,207	17.6
Total	973	-1,621	3,901	757	5,470	3,058	12,538	100

Note totals by age group may vary slightly due to rounding errors

Source: DCLG 2014-based household projections and arc⁴ survey data

- 7.10 This analysis can be applied to the housing need range established for Wolverhampton as set out in **Table 15**. This assumes an annual dwelling target of 670 and an affordable housing target of 25% based on current planning policy.

			Annual dwelling need	350
Dwelling type/size	Market (75%)	Affordable (25%)	Total	
1/2 Bed House	84	15	99	
3 Bed House	215	14	229	
4+ Bed House	104	14	118	
1 Bed Flat	-12	72	60	
2/3 Bed Flat	45	11	56	
1 Bed Bungalow	-13	31	18	
2 Bed Bungalow	45	11	56	
3+ Bed Bungalow	29	0	29	
Other	5	0	5	
TOTAL	502	168	670	
Dwelling type	Market (75%)	Affordable (25%)	Total	
House	403	43	446	
Flat	34	83	116	
Bungalow	61	42	103	
Other	5	0	5	
Total	502	168	670	
Number of bedrooms	Market (75%)	Affordable (25%)	Total	
1	-18	102	84	
2	166	38	204	
3	250	14	264	
4	104	14	118	
Total	502	168	670	

Source: arc⁴

- 7.11 The range of affordable dwellings needed is based on an analysis of the latest (Feb 2019) housing register. Analysis has considered the affordable needs of:

- Existing households not currently in social/affordable rented housing;
- Existing households wanting to move to another social/affordable rented dwelling;
- Newly-forming households on the housing register.

7.12 As the housing register only provides data on dwelling size, assumptions have been made regarding the range of dwellings by type for different bedroom sizes (Table 16)

No. beds required	Dwelling type			
	House	Flat	Bungalow	Total
1		70%	30%	100%
2	40%	30%	30%	100%
3	100%			100%
4	100%			100%

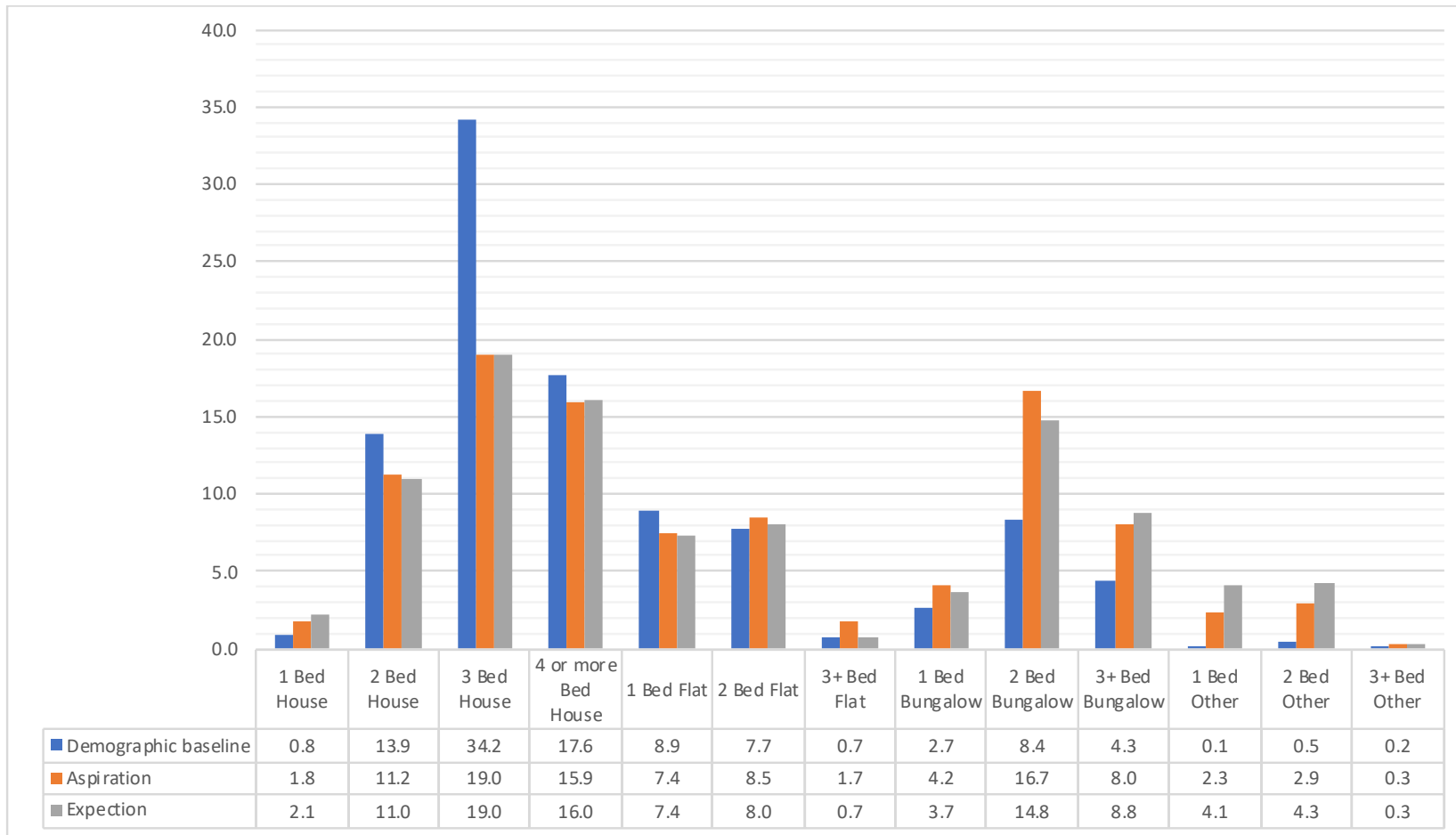
7.13 Analysis concludes that the following range of affordable dwellings by bedroom size are required:

- One bedroom 60.9%
- Two bedrooms 22.4%
- Three bedrooms 8.4%
- Four bedrooms 5.9%
- Five or more bedrooms 2.3%

Household aspirations and expectations

7.14 Analysis has also considered the dwelling type and size aspirations (likes) and expectations of households planning to move, by age group and household type. The result of this analysis is presented in Figure 46. This shows a skewing of need towards smaller dwellings, with a particular focus on bungalow/level access provision. This is driven by the aspirations of an ageing population. This analysis points to the potential and dramatic impact of the housing requirements of an ageing population on delivery.

Figure 46 Summary of dwelling types under baseline demographic, aspiration and expectation



Source: CLG 2014-based household projections and arc4 household survey data applied to household projection

Concluding comments

- 7.15 This analysis draws upon evidence from household surveys carried out by arc⁴ which establishes the link between household type, age group and the range of dwellings occupied. It also considers the impact of future aspirations on dwelling need and the particular impact of an ageing demographic on the range of dwellings appropriate for that population in particular.
- 7.16 We would recommend this analysis for further consideration by the Council and the significance it may play in determining appropriate ranges of housing development over the remainder of the Plan Period.

8. Affordability

- 8.1 The relative cost of alternative housing options across the City of Wolverhampton Council is explored in Table 17. This includes affordable and market rent options and intermediate tenure options. Table 18 shows the income required for alternative tenure options to be affordable and Table 19 presents the assumptions underpinning the analysis. Note that the model assumes that all tenures are available in all wards although in reality some tenure options may not be currently available.
- 8.2 This analysis then considers income availability within each ward. Income is derived from CAMEO. CAMEO data is a consumer analysis database (like ACORN or CACI) combining public data and customer data. CAMEO Income has been calibrated against key market research reports such as the Expenditure and Food Survey and the New Earnings Survey. The classification groups GB postcodes into 8 income bands and 48 categories which segment each of the bands into its main socio-economic and demographic clusters. Income in each ward is derived through individual postcode income levels aggregated and averaged, the provide very good working estimates.
- 8.3 The red/green coding is designed to quickly direct the reader to whether a mean income could afford a particular tenure type in each location. It cuts the afford/not afford off at the specific price point and therefore acts as a useful guide.
- 8.4 Analysis indicates that for open market sale housing at City level the minimum gross income required is £26,229 (LQ) or £35,742 (MQ). For rent the levels are £20,592 (LQ) and £26,016 (MQ). These amounts do vary by area, for example income requirements for entry-level renting range between £17,280 in Park ward and £26,400 in both Bushbury North and Springvale wards. For entry-level home ownership, income requirements range between £20,186 in St Peters and £38,571 in both Tettenhall Wightwick and Penn.
- 8.5 Whilst more detailed analysis is required, it is clear that affordability is challenging for many tenures and many households will struggle to afford the tenure of their choice in a location they wish to live.

Table 17 Relative cost of alternative housing options										
	Bilston East	Bilston North	Blakenhall	Bushbury North	Bushbury South and Low Hill	East Park	Ettingshall	Fallings Park	Graiseley	Heath Town
Social Rent	£18,472	£18,472	£18,472	£18,472	£18,472	£18,472	£18,472	£18,472	£18,472	£18,472
Affordable Rent (80% of median private rent)	£20,045	£19,123	£21,120	£23,962	£21,120	£21,120	£21,120	£22,810	£20,122	£22,810
Market Rent - Lower Quartile	£21,648	£17,664	£21,648	£26,400	£23,712	£23,712	£23,712	£23,712	£18,912	£23,712
Market Rent - Median	£25,056	£23,904	£26,400	£29,952	£26,400	£26,400	£26,400	£28,512	£25,152	£28,512
Market Rent - Upper Quartile	£29,016	£29,952	£31,200	£33,696	£29,952	£31,200	£29,952	£31,824	£28,512	£31,200
Market Sale - Lower Quartile (assumes 10% deposit)	£21,214	£27,771	£21,857	£28,800	£25,714	£20,829	£22,114	£29,571	£21,857	£20,957
Market Sale - Median (assumes 10% deposit)	£30,471	£32,400	£31,243	£34,329	£36,000	£27,321	£30,857	£33,943	£32,657	£25,714
Market Sale - Average (assumes 10% deposit)	£34,776	£33,609	£43,841	£39,550	£53,001	£27,690	£35,356	£35,365	£40,589	£34,656
Starter Home	£24,377	£25,920	£24,994	£27,463	£28,800	£21,857	£24,686	£27,154	£26,126	£20,571
Shared ownership (50%)	£23,433	£24,810	£23,984	£26,187	£27,380	£21,184	£23,709	£25,911	£24,994	£20,037
Shared ownership (25%)	£19,497	£20,625	£19,948	£21,753	£22,730	£17,655	£19,723	£21,527	£20,775	£16,716
Help to buy	£16,929	£18,000	£17,357	£19,071	£20,000	£15,179	£17,143	£18,857	£18,143	£14,286
LQ income	15,000	15,000	15,000	15,000	15,000	15,000	15,000	15,000	15,000	15,000
MQ income	15,000	15,000	15,000	25,000	15,000	15,000	15,000	15,000	15,000	15,000
Mean income	16,358	19,803	19,174	22,675	14,596	13,913	16,297	20,263	18,477	14,794

Source: Data produced by Land Registry © Crown copyright 2018, Zoopla 2018, CLG

Table 18 Income required for alternative options to be affordable											
	Merry Hill	Oxley	Park	Penn	Spring Vale	St Peter's	Tettenhall Regis	Tettenhall Wightwick	Wednesfield North	Wednesfield South	Total
Social Rent	£18,472	£18,472	£18,472	£18,472	£18,472	£18,472	£18,472	£18,472	£18,472	£18,472	£18,472
Affordable Rent (80% of median private rent)	£23,962	£22,214	£17,318	£25,958	£22,963	£18,317	£22,963	£22,810	£22,810	£21,120	£20,813
Market Rent - Lower Quartile	£23,904	£21,744	£17,280	£28,512	£26,400	£18,096	£22,896	£23,712	£22,896	£21,648	£20,592
Market Rent - Median	£29,952	£27,768	£21,648	£32,448	£28,704	£22,896	£28,704	£28,512	£28,512	£26,400	£26,016
Market Rent - Upper Quartile	£36,000	£31,200	£26,400	£36,000	£33,696	£27,648	£36,000	£36,000	£31,200	£31,200	£29,952
Market Sale - Lower Quartile (assumes 10% deposit)	£35,036	£28,543	£28,414	£38,571	£25,200	£20,186	£37,286	£38,571	£28,286	£28,029	£26,229
Market Sale - Median (assumes 10% deposit)	£47,186	£34,701	£39,857	£47,571	£33,422	£25,714	£47,443	£53,421	£32,721	£36,256	£35,742
Market Sale - Average (assumes 10% deposit)	£49,048	£37,425	£59,284	£49,041	£33,702	£59,570	£63,819	£62,129	£33,539	£41,341	£44,808
Starter Home	£37,749	£27,761	£31,886	£38,057	£26,738	£20,571	£37,954	£42,737	£26,177	£29,005	£28,594
Shared ownership (50%)	£35,365	£26,453	£30,134	£35,641	£25,540	£20,037	£35,549	£39,817	£25,039	£27,563	£27,196
Shared ownership (25%)	£29,271	£21,971	£24,985	£29,496	£21,223	£16,716	£29,421	£32,917	£20,813	£22,880	£22,579
Help to buy	£26,214	£19,279	£22,143	£26,429	£18,568	£14,286	£26,357	£29,679	£18,179	£20,142	£19,857
LQ income	15,000	15,000	15,000	35,000	15,000	5,000	25,000	25,000	15,000	15,000	15,000
MQ income	25,000	15,000	25,000	35,000	15,000	15,000	35,000	35,000	15,000	15,000	15,000
Mean income	29,043	22,294	25,741	39,441	19,551	13,750	£38,618	40,920	21,027	21,811	22,622

Table 19 Assumptions in assessing income required for alternative tenure options		
Tenure	Tenure price assumptions	Affordability assumptions
Social rent	Prevailing prices	Affordability 35% of gross income
London Affordable Rent	Affordable homes based on social rent levels for low income households	Affordability 35% of gross income
London Intermediate Rent ('London Living Rent')	Homes for middle-income households struggling to save for a deposit based on a third of average local household incomes and adjusted for the number of bedrooms – a significant discount on market rent in most London Boroughs	Affordability 35% of gross income
Market Rent – lower quartile	Prevailing prices	Affordability 35% of gross income
Market Rent – median	Prevailing prices	Affordability 35% of gross income
Market Rent – upper quartile	Prevailing prices	Affordability 35% of gross income
Market Sale – lower quartile	Prevailing prices	90% LTV, 3.5x gross income
Market Sale – median	Prevailing prices	90% LTV, 3.5x gross income
Market Sale – average	Prevailing prices	90% LTV, 3.5x gross income
Starter Home	20% discount on full value (assumed to be median), 10% deposit on discounted portion, remainder mortgage based on 3.5x income	90% LTV, 3.5x gross income
Shared ownership (50%)	Total price based on median price and 50% ownership. Mortgage based on 40%. 10% deposit required, annual service charge £395, Annual rent based on 2.75% of remaining equity	90% LTV, 3.5x gross income for equity and 25% of income for rental element
Shared ownership (25%)	Total price based on median price and 25% ownership. Mortgage based on 20%. 5% deposit required, annual service charge £395, Annual rent based on 2.75% of remaining equity	90% LTV, 3.5x gross income for equity and 25% of income for rental element

Source: Data produced by Land Registry © Crown copyright 2018, Zoopla 2018, CLG

9. Conclusions and implications for the housing strategy

- 9.1 Wolverhampton has a distinct city structure within an otherwise fragmented conurbation. It has a clear city centre offer for the city's wide catchment and hinterland, with assets such as the Molineux stadium, the University presence, strong R&D investment, and the notable i54 success. It has some of the strongest suburban neighbourhoods in the conurbation. A buoyant and varied new build market (5,985 new build in 2000-14) is a factor in the population inflow attracted from Birmingham and Sandwell, while international migration has prevented overall population loss. Wolverhampton also has a substantial pipeline for housing (9,470 net completions expected in 2017-26) and employment land and has investment credibility from its policy record of mixed-use growth.

The economy

- 9.2 Like other medium-sized cities in declining conurbations, Wolverhampton has seen poor recent economic growth (GVA measure) and job creation, including city centre employment loss. It has a low but recovering employment rate. Limited economic growth is forecast, with any Brexit scenario a further risk.⁶
- 9.3 The evidence shows that the local economy has struggled in a period of transition which has seen a shakeout of employment in manufacturing during the first part of the 21st Century, a loss of public sector jobs and a City Centre which has underperformed and needs to establish a new function based on refreshed leisure, retail and housing offer. The Housing market has been impacted by national trends in falling home ownership and the growth of private renting, as well as local economic performance. Increasingly, the growth framework involves housing as an integral solution to the development of a vibrant city centre, the retention of economically active residents, and the development of new transport and employment corridors.
- 9.4 The high level of workless households is a particular challenge for social housing providers as the incidence of 22.5% of households of working age having no one at work is 60.7% higher than the regional average. It is likely that this is also now an issue in some segments of the low value private rented sector which tend to occupy neighbourhoods where social housing is also concentrated. This particular social and economic issue may therefore lend itself to targeted training and employment initiatives which are supported by public sector and Housing Association procurement policies. Comparing Figure 2 which details the spatial distribution of those with an NVQ 4 qualification, with Figure 4, which looks at employment rates at small area level, shows that that in some parts of the city it is too simplistic to suggest that training and education alone will result in higher employment levels. It is evident that, particularly in some inner-city neighbourhoods there is a coalescence of relatively high educational attainment and low employment levels suggesting there are other barriers which need to be overcome to allow stable participation in the labour market. Increasingly

⁶ Peter Brett Associates, 'Black Country and South Staffordshire Strategic Housing Market Assessment', [consultancy report], London: Peter Brett Associates LLP, 2017, 62.

economic participation has become important to achieving sustainable housing solutions given the incremental reform of Housing Benefit which has been implemented to restrict the growth of claimants and expenditure in this part of the national welfare budget.

Neighbourhoods and urban form

- 9.5 The very distinct waves of urban development which have shaped the City of Wolverhampton have created a complex pattern of tenure distribution between clusters of neighbourhoods and related differences in social and economic profiles. The City's relationship to the Black Country has meant that it does not have highly defined inner city and suburban zones as found in more typical free standing medium sized and larger cities in the UK. Spatial policy therefore reflects a history of mixed-use developments, and commuting, housing market and employment linkages both to a large industrial hinterland to the south and east, and rural areas to the north and west. Public sector Interventions are spread across the city reflecting the balance of need and opportunity, and the ability to harness micro residential markets which have different histories and customer bases.
- 9.6 There are a number of key issues which emerge:
- The integration of housing, transportation and employment development along defined corridors in the City is having an observable impact upon the provision of new housing supply. This is particularly evident within the Stafford Road Corridor and in and around Bilston Urban Village (see figure 9);
 - The regeneration and modernisation of the City Centre is a key public policy objective for the local authority and its partners. In most successful city centre development projects in cities such as Birmingham, Leeds, Manchester and Salford the relocation of students into city centre apartments using a shared model helped kick start the development process and contributed to a critical mass of activity. The evidence highlighted in Figure 19 shows that despite the University of Wolverhampton's large student population, there are relatively few concentrations of students living independently in the City. Many may be living at home and spread across a wider geographical area. This suggests that the contribution that students can make to residential city centre regeneration needs to be scoped in more detail and the offer to students may need to be different from that in other locations if it is partially servicing a more local market and potentially a more mature age cohort.
 - There is an overlay of housing market pressures in some of the older neighbourhoods surrounding the city centre. Most of these areas have experienced significant population increase during this decade and were already prone to overcrowding in the previous decade as illustrated in the 2011 Census. Additionally, there has been a growth of private renting in these locations and the evidence from the DWP data base suggests that reliance on Housing Benefit is very high, reflecting low income work and unemployment concentrations. The evidence from the mapping of geodemographic data (Figures 15, 17 and 18) suggests that these neighbourhoods house substantial numbers of families with children, low income households and a large and growing BME community. Given the composition and scale of housing demand these locations are likely to present increasing issues of

overcrowding, disrepair, and challenges to housing standards going forward. The combination of social stress, low value private renting and low incomes will put pressure on an ageing housing stock which was renovated in the most part more than 40 years ago through now defunct urban renewal programmes.

- Other locations within the City which experience social stress are largely former council estates, which are now mixed tenure as a result of the Right to Buy. These areas have more resources for neighbourhood management because of the high concentration of social housing and the dominance of a single landlord (Wolverhampton Council). The Geodemographic information in Figure 15 when compared to the tenure profile of social housing in Figure 11 shows that in areas of social renting there would appear to be a high churn associated with younger households often adjacent to more stable older residents. This may warrant further investigation to see if the use of the social sector is changing over time, and if social housing and privately rented alternatives are becoming more interchangeable products for younger cohorts.
- The extent of relative price falls for housing in the City is both a product of differential migration (a tendency to export higher income earners) and the weakness of the local economy. The mapping does however illustrate the need to support house prices and homeownership where ever possible through area-based improvement, strategic new build projects and potentially new approaches to neighbourhood management. These new approaches to neighbourhood management could involve Registered Providers in some locations as well measures to support and regulate the private Rented Sector (see for example the Greater Manchester Ethical Lettings Agency project). Despite price falls, it is clear that affordability is challenging for many tenures and many households will struggle to afford the tenure of their choice in a location they wish to live.
- Finally, if levels of home ownership have followed national trends since 2011 in Wolverhampton, then owner occupation will be on average just over 50% of the housing stock across the city and in many neighbourhoods, it will be way below this level. Owner Occupation is important to neighbourhood stability, the ability to secure credit for business start-ups, and to support the very local economy through maintenance and improvement expenditure. This suggests that there may be a spatial dimension to the promotion of homeownership using national government financial products such as shared ownership and build for sale in some parts of the city.

Population and migration

- 9.7 The spatial patterns of both inward and outward movement from Wolverhampton illustrates the scale of the city's hinterland which stretches into Shropshire, South Staffordshire and the Black Country. The population residing in this hinterland forms the potential customer base for the new leisure, retail and housing offer for Wolverhampton City Centre, and provides a framework for marketing, particularly for the younger population in South Staffordshire who look to the conurbation for work, education and leisure;

- 9.8 The figures re-emphasise the importance of international migration to sustain the vitality of the City's labour market and leisure scene. The average figures for the growth of population derived from international migration and the numbers of live births by mothers born outside the UK suggest that without this stimulus the City would still have a declining population of around 1,660 per year. Given the population projections by ONS released in 2018 it will be more important than ever that the City continues to attract young and aspirational groups and this in the first instance is likely to mean a well maintained and quality private rented sector as well as choice in affordable housing options at entry point in the owner-occupied sector;
- 9.9 The ONS population projections show a number of seismic shifts in the structure of the residential base and therefore the local labour market over the short and medium term. The most immediate and pressing issue is in the changes projected for the key new household forming cohort in the 20-29 age group. In Wolverhampton this group is projected to reduce by 11.3% or 4,000 people by 2026. Furthermore the 2016 numbers in this cohort do not recover their 2016 level until 2033. Even after 2033 the household formation for those under 35 is projected to finish the planning period in 2041 with a similar level of housing demand for that group to that which existed in 2016.
- 9.10 Conversely the projected population growth in the short to medium term is projected to be generated by increasing longevity. The number of people aged over 65 is projected to see growth of 12,000 by 2033 (27.9%).
- 9.11 There is therefore a change in population structure underway now which will have a noticeable impact on Labour supply and housing demand in the medium term unless the City can attract an enhanced flow of young people in future in what will be a very competitive market. The household projections show a flat profile for household formation for the young and the younger middle-aged groups by 2041 and the overwhelming driver of growth being in the aged above 44 years. There is therefore a change in the structure of housing demand underway, and this will need a different approach to housing enabling going forward, with closer working with NHS and care providers, adaptation of dwellings and different types of new supply looking forward. These structural changes in demand may take some time to become apparent given the backlog of demand which has been generated by the cumulative historically low levels of new housing supply generated locally and nationally following the crash of 2008/9. This will allow time to pilot new products and approaches to meeting the needs of the ageing society and a new type of housing market.

Future housing requirements

- 9.12 Analysis indicates that the majority of need going forward will be for 3-bedroom (32.4%) and 4 or more-bedroom (17.6%) followed by 1/2-bedroom houses (14.2%). Regarding dwelling type, analysis suggests a broad split of 66.5% houses, 17.4% flats, 15.4% bungalows (or level-access accommodation), and 0.8% other (for instance self/custom build and specialist accommodation).
- 9.13 In terms of affordable dwellings analysis concludes that the following range of affordable dwellings by bedroom size are required:
- One bedroom 60.9%

- Two bedrooms 22.4%
- Three bedrooms 8.4%
- Four bedrooms 5.9%
- Five or more bedrooms 2.3%

9.14 Analysis has also considered the dwelling type and size aspirations (likes) and expectations of households planning to move, by age group and household type. This shows a skewing of need towards smaller dwellings, with a particular focus on bungalow/level access provision. This is driven by the aspirations of an ageing population. This analysis points to the potential and dramatic impact of the housing requirements of an ageing population on delivery.

Implications for the housing strategy

9.15 There is a need to increase the supply of housing to support increasing populations, retain economically active households and underpin new opportunities such as the city centre. Building homes, at the right price, tenure, size and type in neighbourhoods where people want to live will be a priority. Developing the options for planning to negotiate this offer on new sites coming forward and ensuring that VW Living maximises its delivery will be a priority.

9.16 New supply must be of a quality to attract and retain young economically active households. The City is reliant on in migration for growth and the housing offer needs to provide choice and opportunity as households move through their lifecycles. This may require specific 'products' to enable households to access the tenure of their choice which could be in place of an element of affordable rented housing.

9.17 The size and type of housing to be built need to focus on aspirations of local households. Initial data reviewed in this evidence suggests that the majority of need going forward will be for 3-bedroom (32.4%) and 4 or more-bedroom (17.6%) followed by 1/2-bedroom houses (14.2%). Regarding dwelling type, analysis suggests a broad split of 66.5% houses, 17.4% flats, 15.4% bungalows (or level-access accommodation), and 0.8% other (for instance self/custom build and specialist accommodation).

9.18 There is a need to continue to provide affordable housing, the population is growing, and a low quality private rented sector is taking on a role for supporting those in housing need. Careful consideration should be placed on the location of new affordable housing given the significant levels across the City and in some specific locations. The priority for affordable housing should be:

- rebalance what you have to support people moving
- support those using the low quality PRS to get into social housing
- meet the need from newly forming households

9.19 For affordable housing, the evidence confirms the need for smaller homes, focusing on one bed properties. This evidence should be further tested by developing a primary dataset.

- 9.20 It is important to create a high-quality housing offer in the city centre. An offer that attracts residents to the city centre will need to be clearly developed which may require unique sales and rental products designed and implemented by the city. Further research is likely to be required to consider how this is focused and how it can be developed to support economically active households, retain graduates and support key workers.
- 9.21 The private rental market is growing and there is a need for a higher quality new build PRS 'build to rent' offer with high quality management services; not only in the city centre but elsewhere for families. A quality rental offer will support economic mobility to support the continued inward migration of households to the City.
- 9.22 Whilst the city should support the growth of a higher quality private rented sector, it also needs to consider how to support and sustain home ownership opportunities for households. Affordability is challenging in many locations but creating an entry point for home ownership will be required to rebalance a number of neighbourhoods where renting is the majority.
- 9.23 There are significant stock condition challenges, particularly in the quality of private sector stock. There needs to be a continual focus on housing standards, focusing/targeted on neighbourhoods that surround the city centre and alternative management arrangements for these neighbourhoods will need to be explored such as an ethical letting agency. As lower quality private rented stock becomes interchangeable for social rented stock, the need to create across the board standards grows in importance and relevance.
- 9.24 Creating new markets are key; the City Centre is a prime target as well as the 3 corridors focused for future development; creating the right sequencing for these opportunities as well joining the housing offer for the inner suburbs with the City Centre – South and North East of the Ring Road will need to be a focus. However, these transformation locations will not create change in some of the neighbourhoods that are exhibiting poor indicators of wealth and opportunity; managing these will be critical to underpin investment elsewhere and management of these locations will require consideration by the city.
- 9.25 As the population ages, an older person offer that supports 'active' older to remain living longer in their current home and for 'older' older to move into more supported accommodation, will be a priority. There will need to be a robust offer for older households linked to new supply, opportunity to access adaptations, links with NHS and care workers and innovative thinking for supporting this cohort as it ages. The development of the Home Improvement Agency is a positive step forward.
- 9.26 There needs to be a continued momentum around the worklessness agenda. This needs to be focused at households living in social housing and private sector housing as these tenures are becoming interchangeable (in the rented sector). The city has a successful track record that needs to continue to create employment opportunities and secure the maximum economic value for public procurement and construction opportunities.
- 9.27 The need to continue to partner with other agencies to deliver support for people who are homeless or rough sleeping will continue as welfare reforms continue to bite. This will sit along-side the need to think creatively about how partner organisations can work

together to provide support for households that present a range of challenges to the City.

Appendix A: The national, regional and local context

Increasing housing supply and access to home ownership

A.1 The *Housing White Paper, Fixing our broken housing market* published in February 2017 made a number of proposals principally designed to boost the rate of new house building and improve access to home ownership. These have been taken further in the *Autumn Statement 2017*, the *Housing Green Paper 2018* and *Autumn Budget 2018*. A new *National Policy Planning Framework* setting out the government's policy for local planning in England was published in July 2018. The combined effect of these has been to:

- Increase funding to support provision of 300,000 new homes per year by the mid-2020s
- Introduce a Housing Delivery Test for councils with targets for the delivery of homes
- Lift the Housing Revenue Account borrowing cap, allowing councils to borrow against their HRA in order to build new affordable homes (and estimated 10,000 per year)
- Provide further help to get onto the housing ladder, including through a new Help-to-Buy scheme (from April 2021) for first-time buyers and by extending Stamp Duty relief to first-time buyers of shared ownership properties worth up to £500,000
- Specify 'social rent' within 'affordable rent' as one of several affordable products;
- Boost the Housing Infrastructure Fund of £500m (bringing the total to £5.5 billion)
- Consult on how local authorities can use RTB receipts to build more homes
- Introduce measures to make best use of the existing social homes
- Introducing a new rent settlement, allowing rents to be raised by CPI + 1% to 2025
- Maintain a presumption against developing in the Green Belt.

A.2 The new Homes England *Strategic Plan 2018/19-2022/23, Making Homes Happen* explains its offer of expert support for priority locations to create and deliver more ambitious plans to build homes, especially for home ownership. Key objectives include:

- *Unlocking land*, using a £1.03 billion Land Assembly Fund to acquire challenging, unviable sites
- *Unlocking investment*, to support housebuilding and infrastructure, including more homes for rent and affordable (but not social) housing
- *Increasing productivity* through supporting modern methods of construction (MMC) and increasing the number of skilled apprenticeships.
- *Driving market resilience* by supporting smaller builders, new entrants and promoting better design and higher quality homes.

The role and purpose of social housing – giving residents a stronger voice

- A.3 Since the *Grenfell Tower Fire* tragedy in June 2017, there has been a new focus on safety and listening to residents. The *Social Housing Green Paper*, published in August 2018, started a ‘national conversation’ on the issues raised by over 8,000 residents and on the role of social housing. The key ideas being explored within the paper include how best to:
- Ensure that social homes are safe and that they meet the Decent Homes standard
 - Improve and speed up the complaint’s resolution process
 - Make landlords more attentive to the voices of their residents by actively regulating ‘consumer standards’ and improving access to information about landlords’ services
 - Tackle the stigma faced by people living in social housing by celebrating thriving communities and involving tenants in design of new homes and places

Homelessness, children leaving care and welfare reform

- A.4 The *Homelessness Reduction Act 2017* requires councils to engage and work with households threatened with homelessness 56 days in advance of the date on which they are expected to become homeless (28 days earlier than previously). It requires tailored advisory services for specified vulnerable groups. Councils must assess and develop an agreed Personalised Housing Plan and help relieve homelessness where prevention has not been an option or successful for a period of 56 days (before any decision on the main homelessness duty). The Act dissolves the local connections rules at the prevention stage apart from a duty to provide care leavers with accommodation.
- A.5 The *Children and Social Work Act 2017* goes further by introducing a new duty on councils to publish a local offer for care leavers with regards to accommodation and wider support.
- A.6 *Welfare Reforms* continue to present challenges for residents, the Council and Registered Providers. Changes that have already been implemented include: a reduction in the Benefit Cap to £20,000 for families and £13,400 a year for single people, the Under-Occupancy Charge (Bedroom Tax) that limits the Housing Benefit entitlement for claimants who are deemed to have one or more spare rooms. The Shared Accommodation Rate now applies for people under the age of 35. Universal Credit is currently being rolled out in Wolverhampton rate. Some minor changes were made to Universal Credit in the Autumn Statement 2017 to help soften the impact on claimants and a further £1.7 billion was announced in the Autumn Budget 2018 to increase work allowances and provide extra help for people moving from existing benefits to UC. Further changes have recently been made by the Secretary of State to address some of the design flaws of Universal Credit.

The regional agenda

- A.7 The West Midlands conurbation includes the cities of Birmingham and Wolverhampton and the large towns of Sutton Coldfield, Dudley, Walsall, West Bromwich, Solihull, Stourbridge and Halesowen.
- A.8 The area of the conurbation between Birmingham and Wolverhampton is known as the Black Country. The Black Country has no single centre, having grown up from a number of historic market towns and industrial villages. It remains essentially polycentric with many of the towns and villages remaining recognisable communities.
- A.9 Two Local Enterprise Partnerships (LEPs) cover the majority of the conurbation area: Black Country LEP comprises the local authorities of Dudley, Sandwell, Walsall and Wolverhampton while the Greater Birmingham & Solihull LEP includes those two authorities and a number of satellite boroughs.

The West Midlands Combined Authority

Devolution Deal

- A.10 The West Midlands Combined Authority (WMCA) is a strategic authority with powers over transport, economic development and regeneration. The authority came into being on June 2016. The Budget of November 2017 confirmed a second devolution deal for the region covering housing, skills, and digital technology.
- A.11 The deal includes funding for a Delivery Team to drive the house-building programme, and investment in high-tech economic sectors. The Housing Delivery Team will help unlock the 200,000 new homes needed in the region by 2031 and is supported by a £5m investment to expand construction skills.
- A.12 The deal also includes funding for a Housing First pilot, a new approach to tackling rough sleeping in the region

Housing & Land

- A.13 Housing and land use is a key WMCA priority with an [Investment Prospectus](https://www.wmca.org.uk/media/2071/wmca-investment-prospectus-march-2018.pdf) setting out up to £10bn in development schemes (<https://www.wmca.org.uk/media/2071/wmca-investment-prospectus-march-2018.pdf>). A £350m housing deal has also been made with the government.
- A.14 The [WMCA Strategic Economic Plan](https://www.wmca.org.uk/media/1382/full-sep-document.pdf) (<https://www.wmca.org.uk/media/1382/full-sep-document.pdf>) anticipates 500,000 new jobs will be created by the year 2030. To accommodate this growth, it has been estimated that land for some 50,000 new houses will need to be identified across the conurbation.
- A.15 At the heart of the plan is the drive to accelerate an improvement in productivity and enable the West Midlands to become a net contributor to the UK exchequer - while improving the quality of life for everyone who lives and works in the area.

A.16 The plan aims to deliver this through:

- creating the conditions for growth, including connectivity and skills
- exploiting the area's world class innovation infrastructure
- improving business competitiveness
- public service reform – transforming lives in the West Midlands
- improving the life chances for everyone, especially those facing multiple disadvantages



A.17 The plan recognises the challenge of building homes. Planning authorities face a major challenge in meeting existing levels of housing demand with many sites difficult to develop because of their size and condition. The current shape and business model of the house building sector can also create challenges.

A.18 In order to accelerate house building, a programme of activity to bring forward development sites is proposed, including land assembly and remediation work. Priority will be given to:

- enabling the development of major housing sites in the most sustainable locations
- a programme to bring forward clusters and small and medium sized sites to support a range of needs and market opportunities
- maintaining and enhancing the existing stock, including energy efficiency.

A.19 In addition, WMCA intend to take a new approach to house building, exploring ways in which it can exploit its scale and potential to work with the house building industry. It hopes to develop a business model which enhances the viability of housebuilding in the area. Proposals include:

- supporting the capacity locally for off-site construction
- supporting local small and medium-sized housebuilders for whom smaller sites will be more viable
- supporting the development of low carbon and zero carbon homes
- establishing a development arm to influence the shape of the construction sector
- exploring a mechanism to invest upfront in social infrastructure in a way that increases the viability of development in return for a share in the financial benefits of that investment
- identifying the house building industry as an early priority for the WMCA's productivity and skills commission.

A.20 Innovation and skills ambitions are supported by investment into the Springfield Campus in Wolverhampton and creation of Europe's largest specialist construction and built environment campus.

The Black Country Core Strategy (BCCS)

- A.21 The Core Strategy is a spatial plan, which goes beyond the traditional land-use based development plan and addresses a wide range of activities and interventions that are required to create sustainable communities across the whole of the Black Country. It provides a clear spatial or locational dimension to the regeneration and renaissance of the area, addressing its economic, transportation, social infrastructure and environmental needs whilst reducing its carbon footprint and helping to tackle climate change.

The Growth Network

- A.22 The BCCS set the policy ambition including that by 2026, the Strategic Centres of Brierley Hill, Walsall, West Bromwich and **Wolverhampton** will have a much stronger role at a regional and sub-regional level, providing:
- Additional 345,000 square metres gross comparison retail floorspace and additional 880,000 square metres gross office floorspace;
 - Major new leisure and cultural facilities;
 - 7,500 new homes of mixed type and tenure - the majority built at high densities as part of mixed-use developments;
 - Excellent public transport links, making the centres highly accessible to increased catchment areas, including new residential communities in the Regeneration Corridors;
 - Significantly improved built and green environments integrated into the development of centres.

Housing Growth

- A.23 The BCCS identifies the need to provide sufficient land to deliver at least 63,000 net new homes over the period 2006 – 2026. The majority of the requirement will be met through committed sites and the phased allocation of sites within the Regeneration Corridors, Strategic Centres, appropriate Free Standing Employment Sites and housing renewal areas, with at least 95% of all new residential development to be built upon previously used / developed land.

Affordable Housing

- A.24 The Local Authorities will aim to provide a minimum 11,000 new affordable dwellings between 2006 and 2026, in partnership with developers and the Homes and Communities Agency. Local Planning Authorities will seek to secure 25% affordable housing on all sites of 15 dwellings or more where this is financially viable. The tenure and type of affordable units sought will be determined on a site by site basis, based on best available information regarding housing need, site surroundings and viability considerations.

- A.25 On sites where 25% affordable housing is proven not to be viable, the maximum proportion of affordable housing will be sought which will not undermine the development's viability, subject to achieving optimum tenure mix and securing other planning obligations necessary for the development to gain planning permission. Financial viability assessments conforming to an agreed methodology will be required and, where necessary, independently appraised by the local planning authority at the cost of the applicant. Claw back and other flexible arrangements will be sought through planning agreements, wherever possible, to allow for changing market conditions in future years.

Issues and Options Report (consultation ended 08/09/2017)

<https://blackcountry.jdi-consult.net/localplan/readdoc.php?docid=6>

- A.26 A new strategy is planned to be in place by Autumn 2021. Initial consultation has now taken place through an Issues and Options Report. This clearly recognises that further land will be needed, beyond the existing spatial strategy, to meet all of the Black Country's growth needs. It is estimated that further land will be required to provide 22-25,000 new homes and up to 300 ha of new employment land.
- A.27 In terms of **role of the Growth Network** the following options are being considered:
- continue and strengthen the Growth Network with some corridors being housing led and others employment led. Remaining housing and employment land growth to be accommodated in the green belt.
 - restructure the existing Growth Network, with more occupied employment land being redeveloped for housing in the Regeneration Corridors. Remaining housing and employment land growth, and replacement employment land, to be accommodated in the green belt.
- A.28 In terms of **housing development outside the Growth Network** the following are being considered as options:
- rounding off the green belt and meet housing needs through a large number of small sites
 - identification of a limited number of large Sustainable Urban Extensions in the green belt
 - once the above have been fully explored, if total need still cannot be met the Black Country would need to work the other authorities to "export" the shortfall
- A.29 Revisions are also considered to the following housing policies:
- **Policy HOU1 - Housing Land Supply** – the existing core strategy had predicted a significant housing loss would take place due to demolitions. This has not been the case and the policy requires revision. There is also potential to increase high density housing allocations within Strategic Centres.
 - **Policy HOU 2 - Housing Density, Type and Accessibility** – the 2017 Black Country and South Staffordshire Strategic Housing Market Assessment provides new guidance on the likely needs of different groups for housing over the new Plan period. This concludes that, given the nature of the existing housing stock, the optimum mix

overall would be: 12% 1 bed; 22% 2 bed; 40% 3 bed; and 26% 4 bed properties, although this would vary by area and tenure. The SHMA also highlights a need for 162 new sheltered and extra care homes every year to meet the needs of older persons – 5% of the total housing need. There may also now be a need to require the provision of self-build plots on larger developments.

- **Policy HOU3 - Affordable Housing** - The 550 affordable homes annual target was significantly exceeded during 2009-2015, with 1045 new affordable homes provided per year on average, the majority grant funded. The 2017 SHMA suggests that the affordable housing target should be higher, at 23.4% of total housing need or 832 homes per year. It is predicted that this should be deliverable but is dependent upon future levels of grant funding. The SHMA also sets out an estimated need for 188 starter homes per year. Options for increasing supply include increasing the percentage requirement or reducing the policy threshold to ensure delivery on smaller sites.

Black Country and South Staffordshire SHMA (2017)

- A.30 The Strategic Housing Market Assessment (SHMA) was commissioned jointly by Dudley Metropolitan Borough Council (DMBC), Sandwell Metropolitan Borough Council (SMBC), Walsall Council (WC), City of Wolverhampton Council (CWC) and South Staffordshire Council (SSC).
- A.31 The BCCS had a target of 566 dpa for the borough of Wolverhampton. The Regional Spatial Strategy set a net target of 390 dpa between 2006 and 2011, increasing to 675 dpa between 2011 and 2021. Between 2006 and 2016, 4,266 dwellings were completed in Wolverhampton against a BCCS target of 5,662 dwellings over the same period. This is a shortfall of 1,396 dwellings against the BCCS plan target. The BCCS focused housing growth in Wolverhampton city centre and along Regeneration Corridors 2, 3 and 4. Wolverhampton's housing delivery strategy is based primarily on the reuse of brownfield land in employment areas.
- A.32 According to the ONS, average house price in the first quarter of 2016 for Wolverhampton was £127,500 compared to £164,950 for the West Midlands and £215,000 for England. House prices England and the West Midlands have outperformed Wolverhampton's since the late 90s. Since 2012, the change in house price was also outperformed by all the comparator authorities.
- A.33 Wolverhampton has good affordability when compared to the West Midlands and England. The borough's affordability ratio reached its peak in 2008 and declined substantially during the downturn. Since 2013, Wolverhampton has seen a small increase in its affordability ratio.
- A.34 Housing delivery in Wolverhampton has fallen short of the BCCS's target on several occasions. While the BCCS identified sufficient land to meet the target, most of Wolverhampton's new dwellings were planned for brownfield sites much of it in areas earmarked for housing renewal. The high demolitions in Wolverhampton since the early 2000s accounts for the uneven rate of dwelling completions. However, based on our analysis of affordability and average house prices, we do not think this is indicative of any undersupply of housing. The market signals do not show adverse pressure on the housing market in Wolverhampton.

- A.35 The OAN for Wolverhampton has been calculated at an average of 710 dwellings per annum.

Local policy context

- A.36 Wolverhampton is a City to the north west of the West Midlands conurbation (see Map 1) and is estimated to be home to approximately 249,900 people. The countryside of South Staffordshire is to the north and west of the city, with the urban area to the south and east. Wolverhampton is the only city in the Black Country and has an important role to play in the future direction of the conurbation. The administrative area includes the City Centre and the Town Centres of Bilston and Wednesfield Village. The City also has good transport links with the sub-region and the rest of the UK, with the M54 link to the M6 motorway and good public transport links with the Metro, cross country railway links, and strategic bus routes

Wolverhampton City Strategic Centre

- A.37 By 2026 Wolverhampton will be served by an established, confident City Centre with a wide variety of quality shops and cultural attractions, 21st century offices, urban living and a city-scale public transport interchange. A modern public realm network and vibrant Canalside quarter will have made the compact City Centre attractive to walkers and cyclists. Historic areas will provide an enhanced, well maintained built environment which will be attractive to visitors, commercial businesses and residents.

Housing Commitments (April 2009)	-	2,130 dwellings
Additional Housing Capacity	-	1,100 dwellings
Of which: 2009-16	-	0 dwellings
2016-26	-	1,100 dwellings
Total Estimated Housing Capacity up to 2026	-	3,230 dwellings

Area Action Plans

- A.38 There are 3 Area Action Plans being prepared in Wolverhampton for parts of the city that will be subject to significant change up to 2026.
- A.39 The Area Action Plans will guide the transformation of these areas and provide detailed policies and proposals to deliver the Black Country Core Strategy at a local level. The area action plans will, when adopted, form part of the Development Plan for Wolverhampton, and will replace some allocations and policies in the Unitary Development Plan.
- A.40 [The Wolverhampton City Centre Area Action Plan](#) (2015 – 2026) was adopted in September 2016. By 2026 the AAP will deliver the following key development outputs:
- 35,000 sq metres (gross) of net additional non-food (Comparison) floorspace

- 12,000 sq metres (gross) of net additional food (Convenience) floorspace
 - Around 70,000 sq metres (gross) of new Office provision
 - Around 26,000 sq metres (gross) of new Leisure floorspace, including cinema and hotel provision
 - Around 18,800 sq metres (gross) of new education floorspace
 - 2,043 new homes, 475 to be delivered by 2021
 - 31 ha of local quality employment land
 - An accessible network of high quality environmental infrastructure
- A.41 [The Stafford Road Area Action Plan](#) (2013 – 2026) was adopted in September 2014. The Stafford Road Corridor, covers the area from the A449 at Junction 2 of the M54 to the outskirts of Wolverhampton City Centre, and is one of the main ‘gateways’ into Wolverhampton and the Black Country. It contains important road, canal and rail infrastructure that links the City with Staffordshire, Shropshire, Telford and NorthWest England.
- A.42 By 2026 the development outputs for the Stafford Road Area Action Plan will deliver at least
- 450 new homes, together with 780 homes on existing housing commitment sites.
 - Services and infrastructure identified and planned for to serve new development and benefit existing communities.
 - New investment in transport, community facilities, environmental projects and the public realm.
- A.43 [The Bilston Corridor Area Action Plan](#) (2013 – 2026) was adopted in September 2014. The AAP will ensure that:
- At least 320 ha of land is safeguarded for employment uses. 60 ha will be targeted for investment to meet demand and improve the quality of premises available, creating an extra 2,100 jobs in the area
 - New development sites are released to provide at least 1,445 new homes, together with 1,155 homes on existing housing commitment sites
 - Services and infrastructure are identified and planned for to serve new development and benefit existing communities, including transport, community facilities, environmental projects and the public realm.

Housing Land Supply Position

- A.44 The Council has two large sites under commitments – “Ward Street Masterplan Site” (512 dwellings) and “Former Goodyear Site” (469 dwellings). The Council note that a developer is in place on both sites and are they are progressing well. There are no particular risks associated with the delivery of these sites.

- A.45 Of the Council's extant Local Plan allocations, 1,450 dwellings are to be delivered on large sites. There are 5 large sites in total:
- "Bilston Urban Village" (400 dwellings)
 - "Cable St/ Steelhouse Lane" (365 dwellings) "
 - Heath Town Estate Masterplan" (225 dwellings)
 - "Westside, Wolverhampton City Centre" (250 dwellings)
 - "Stafford St/ Cannock Road, Wolverhampton City Centre" (210 dwellings)
- A.46 Countryside Homes are involved with Bilston Urban Village and this is progressing well. The Council are looking to purchase Cable Street with LEP funding as this is not moving forward at the desired pace. Heath Town Estate is a Council owned renewal site and is progressing well. Land at Westside is also owned by the Council and a development partner is in place. The Council acknowledge there are some risks with Stafford Street in the short-term.
- A.47 In respect of City Centre intensification, the Council notes that recently adopted an AAP which have has fully considered all possibilities of increasing supply. The Council do not consider there are any additional sources of supply in respect of public sector land or estate regeneration.