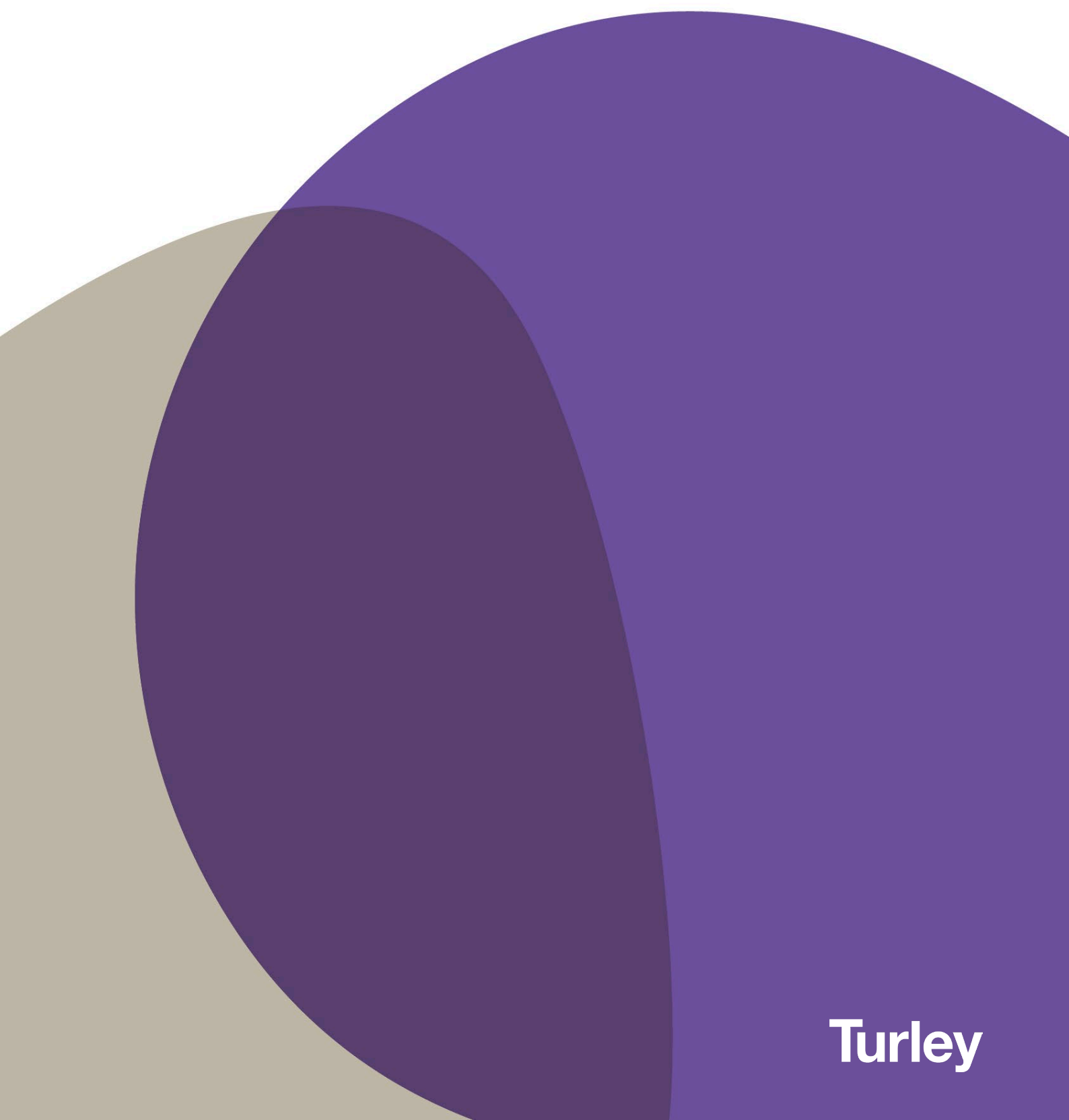


Housing and Employment Needs Assessment

Stoke-on-Trent City Council

May 2026



Turley

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Our reference

04761

May 2026

Executive Summary

1. Turley, Aspinall Verdi and Edge Analytics have been reappointed by Stoke-on-Trent City Council ('the Council') to assess the future need for housing and employment land in the city, over a plan period that is proposed to run from 2020 to 2040, albeit with modelling also presented to 2045 to understand trends thereafter.
2. This follows its previous collaboration with Newcastle-under-Lyme Borough Council – which saw the same team produce both a Housing Needs Assessment¹ ('the original HNA') and Economic Needs Assessment² ('the original ENA') in 2020 – and its subsequent commissioning of a Housing and Employment Needs Assessment Update (HENU) for Stoke-on-Trent alone, in 2021³.
3. The Council has since continued to develop a new Local Plan, having consulted on Issues and Options earlier that year and subsequently run a Regulation 18 consultation over six weeks to 21 October 2025⁴. It commissioned separate evidence on housing needs prior to this, in the form of a Residential Mix Assessment (RMA) that was completed in July 2025⁵.
4. The RMA acknowledged the publication of a revised National Planning Policy Framework (NPPF) in December 2024, introducing a new standard method for assessing the minimum need for housing to replace the approach used in the HENU⁶. It did not though consider whether there could be a greater need for housing, in excess of what is intended to be only a minimum, nor confirm whether such a level of provision would support likely job growth in Stoke-on-Trent.
5. It is for this reason that the Council has commissioned this further study, which draws upon the latest available information – including insights from a range of local stakeholders⁷ – to both establish the job growth that could occur in Stoke-

¹ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent

² Turley (June 2020) Economic Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent

³ Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent

⁴ Stoke-on-Trent City Council (September 2025) Stoke-on-Trent Draft Local Plan 2020-2040: Regulation 18 Consultation Document

⁵ ORS (July 2025) Stoke-on-Trent Residential Mix Assessment

⁶ *Ibid*, paragraph 1.4

⁷ Ten virtual meetings were arranged between March and May 2026, with a mix of developers, registered providers and economic bodies (namely the Staffordshire Chambers of Commerce)

on-Trent and consider the amount and mix of homes and employment land that could be needed to support it. This is generally done in the context of the latest NPPF, published in December 2024, albeit the Government is notably consulting on further changes at the time of writing and their potential impact is therefore also discussed where relevant⁸.

Setting the scene

6. The report confirms that there has been no significant shift in the functional relationships that Stoke-on-Trent shares with other areas, since it was found to have the strongest links with Newcastle-under-Lyme in 2015. It advises the Council to remain mindful of this relationship as it further develops its new Local Plan, as well as its enduring if lesser links with other neighbours.
7. It proceeds to outline how the population, housing market, economy and commercial property market in Stoke-on-Trent have continued to evolve since they were last profiled in 2020, observing that:
 - **The rate of new housing delivery has slowed**, with the stock still oriented towards terraced and semi-detached houses that most often have three bedrooms but frequently also have two;
 - **Population growth has accelerated**, having previously been underestimated, with this growth seemingly increasing the number of families and offsetting the steadier growth of the older population, aged 65 and above;
 - **Both rents and house prices have risen**, particularly at higher levels of the latter market which continue to be dominated by detached, and to a lesser extent semi-detached, houses;
 - **Job growth has slowed over the last six reported years**, to 2024, albeit only due to initial underperformance with an improvement having actually been seen since 2020. The health and social work sector has created the most jobs since 2009, and has been outperformed only by transportation and storage since 2018, but manufacturing, wholesale and retail also remain prominent despite recent job losses;
 - **Unemployment remains relatively low** and a growing proportion of residents are qualified to the equivalent of at least the first year of a bachelor's degree, with fewer having no qualifications at all; and
 - **Warehouses and industrial premises have mainly been developed in recent years**, and have less frequently been lost to other uses. While the

⁸ Ministry of Housing, Communities and Local Government (December 2025) National Planning Policy Framework: proposed reforms and other changes to the planning system

latter are becoming increasingly large, the former tend to be smaller than was previously reported in 2020. Demand for both, as well as offices, has eased over recent years – with more space vacated than occupied – but this will have likely been influenced by limited availability of industrial space especially.

Future employment growth

8. While it has been previously envisaged that an average of around 570 jobs would be created annually in Stoke-on-Trent between 2020 and 2040 – at least as a baseline position – this is based on an increasingly dated forecast that was produced by Experian in March 2020. More up-to-date forecasts are considerably more positive with the latest from Experian envisaging some **945 jobs per annum over the same period, or 912 per annum to 2045**, and another from Oxford Economics only slightly less positive (906/798pa) having previously envisaged job losses. A third forecast, from Cambridge Econometrics, anticipates only 517 jobs being created each year to 2040, rising to 536 per annum to 2045.
9. All of these forecasts would slow the recent trend that has seen Stoke-on-Trent create an average of 1,110 jobs per annum between 2009 and 2024, rising to 1,643 jobs per annum since 2020. It is reasonable to favour the most optimistic – from Experian – for this reason alone, especially with the NPPF explicitly promoting economic growth.
10. There do though remain grounds for developing a more optimistic growth scenario, as previously when even the most optimistic baseline forecast was positively adjusted to better reflect past trends. There remain several sectors that are forecast to create fewer jobs than in the past, including some that the Council views as ‘key’ or ‘important’ such as information and communications; manufacturing; and transport and storage. If such sectors instead sustain their past performance, back to 2009, then around **1,350 jobs could conceivably be created annually over the period to 2040, or 1,334 jobs per annum to 2045**. This could be viewed as a more optimistic growth scenario that supplements the baseline, like its earlier counterpart.

Future need for housing

11. The NPPF continues to require use of a standard method to determine the minimum number of homes needed in an area, but the method itself has evolved since it was previously reported that a minimum of 679 dwellings per annum would be needed in Stoke-on-Trent.
12. While previously based on increasingly dated household projections, the standard method is now driven by the existing stock of an area with an adjustment then made in areas where house prices have typically equated to more than five years’ earnings, albeit this is not the case in Stoke-on-Trent. The

further uplift applied by virtue of its status as one of the country's twenty largest cities and urban centres has also now been removed.

13. Since May 2025, the new method has indicated that **a minimum of 951 dwellings per annum** are needed in Stoke-on-Trent, itself around twice the long-term rate of provision and more than have been delivered in all but one year this century.
14. Demographic modelling suggests that such a level of provision, from 2025 onwards, could cause the population to grow by around 13% over the entire period from 2020 to 2040, or by slightly more (15%) when this is extended to 2045. While this would represent a step up from the growth seen over two decades prior to 2020, it would equally not sustain the particularly strong growth that is believed to have occurred over three years since. It would be expected to grow each age group, albeit with the older population growing most in proportionate terms.
15. The NPPF continues to make clear that the outcome of the standard method should be viewed as only a minimum, allowing authorities to set higher housing requirements linked to economic growth ambitions. It is therefore of note that such a level of provision could combine with changing behaviours – and add to jobs already known to have been created – to grow the labour force and support the creation of some **1,105 jobs per annum over the period from 2020 to 2040, or 1,038 to 2045**. This surpasses what is envisaged by Experian, as a baseline, but would fall short of the higher growth scenario in which 1,350 jobs would be created annually to 2040 (or 1,334 to 2045). Further modelling suggests that **circa 1,227 dwellings per annum** could be needed between 2020 and 2040 – or **1,269 to 2045** – if the Council was to pursue this higher level of job growth.

Size, type and tenure of housing needed

16. Based on the types of households projected to form in these scenarios, and the size of homes occupied by their existing counterparts in Stoke-on-Trent, it is estimated that properties with two bedrooms will most often be needed, closely followed by those with three. Securing such a mix would in turn require the majority of new homes (c.75%) to be houses, based on the profile of the existing stock, although there would also remain a need for some flats (c.15%) and bungalows (c.10%).
17. This does though continue to represent only illustrative analysis that can be used for guidance and monitoring, or as a starting point for discussion. Such a mix should not be rigidly expected of all sites, given the need to respond to changing market demands, local context, the characteristics of particular locations and viability factors. There could also be an economic case for targeting a greater number of larger detached homes – with at least four

bedrooms – to address a longstanding deficiency and support the Council’s aim of retaining higher earners that often move elsewhere.

18. The report proceeds to use the well-established methodology through which the need for affordable housing can be separately estimated, updating but not necessarily replacing a separate assessment undertaken last year. It confirms that 2,826 households are currently enrolled in priority bands on the Council’s housing register and estimates that a further need for 999 affordable homes will arise each year, as existing households’ circumstances change and others form but are unable to afford market housing. While this could generate a gross need for 1,187 affordable homes per annum, various sources of supply should also be taken into account, with the projected availability of 800 affordable homes per annum leaving a net need for **387 such homes every year** to 2040, dropping slightly to **378** over the longer period to 2045. The greatest shortfall is for properties with one bedroom, followed by those with two, but roughly a third does relate to larger homes with at least three bedrooms. While substantially more homes would be needed to deliver such a number of affordable homes, based on the Council’s emerging policies, there has long been acknowledgement of the complex relationship between market and affordable housing, so it is ultimately for the Council to exercise planning judgment in deciding how delivery of the latter could be supported through its choice of housing requirement.
19. Consideration is also given to how the identified need for affordable housing could be met through the delivery of social rent, affordable rent, discounted market sale and shared ownership products. The report shows that the latter two ownership products may play only a limited role in meeting the need generated by newly forming households unable to purchase, since they apply discounts only to new homes that are already priced at a premium, making them cost more than (or the same as) resales even with discounts applied. They could though meet the needs of those unable to *rent*, being affordable to at least 22% of such households. A further 24% could have their needs met by affordable rent – discounting market rents by 20-40% – but the residual 54% would likely be unable to afford even that and could thus require social rented housing. Such a mix is though reflective only of the calculated need, with the Council advised to seek the views of registered providers and also consider viability before deciding on its approach for the emerging Local Plan.
20. With the NPPF continuing to require the housing needs of specific groups to be assessed and reflected in planning policies, the report establishes that:
 - Growth of the **older population** will likely continue, generating an estimated need for 26-27 bedspaces in care homes each year that is *additional* to the reported need for dwellings, although there could also be further demand for 62-70 units of sheltered or extra care housing that is contrastingly included.

- A shrinking proportion of residents have limiting **disabilities**, with fewer also in bad health, and although there has been growth in the number of people living in care homes that do not offer nursing there are otherwise fewer living in medical or care establishments;
- Increasingly few households contain dependent children, although the separately reported number of **families** has actually increased in a sign that not all have formed their own households. Those that do are privately renting more often but continue to generally own their own homes, frequently having three bedrooms but increasingly having more;
- Stoke-on-Trent has a relatively large proportion of **looked after children**, whose needs are primarily met through foster care and adaptations, with there being a shortage of local residential placements and affordable housing for care leavers;
- The number of **privately renting households** has increased by almost a third since 2011, with the tendency to rent rising amongst all types of households. Renting households are becoming larger but continue to most often have two bedrooms, typically in terraced houses;
- The number of **students** enrolled at the University of Staffordshire has recently fallen after a period of growth, largely due to increased competition and new restrictions on international students. It remains a primary choice for both younger and more mature students from the local area, many of whom commute from their existing homes. There is though some demand for purpose-built accommodation, not that this would necessarily be expected to rise if student numbers were to grow again.
- Growth in the number of households looking to **build their own homes** has recently slowed. Applicants tend not to have prior experience of self-build and often already own their own home, but some are notably renting. There is a general preference to build individually but some are also open to group and developer-led options.

Future need for employment land

21. Earlier studies have estimated the need for additional employment land in Stoke-on-Trent but these were based only on outdated forecasts or past take-up – which has inevitably continued – so it is necessary for this report to revisit these calculations.
22. The preferred economic forecasts are once again converted into land and complemented by another scenario which accounts for the labour supply that could result from meeting the minimum need for housing. Past development is again also extrapolated, this time based on the period from 2012 to 2024, but this is now supplemented by a further scenario that allows for a continuation of

past *demand* for space, allowing for any suppression caused by limited availability.

23. These scenarios suggest a need for between **86.4ha and 316.5ha** of employment land over the period from 2020 to 2040, or for between **84.2ha and 379.8ha** over the longer period to 2045. It is the scenarios based on past development and demand that consistently imply the greatest need, for in excess of 305.4ha of land, and it is only these that imply a shortfall – ranging from **141.0ha to 215.4ha** depending on the period covered – when accounting for reported completions and the residual supply as of April 2025.
24. The scenarios can also be broken down by use class, in each case suggesting that the greatest need is for land suited to warehousing, albeit there is also at least some need for offices and industrial premises in every one. When accounting for the type of development that is most likely to come forward on each of the sites in the identified supply – as indicatively assessed by Aspinall Verdi – the greatest shortfall would be for industrial and warehousing land, under the scenarios that extrapolate past development and demand. While there is also implied to be a shortfall of land suited to offices, across all of the scenarios, this is much smaller and could be conceivably resolved through the separate supply of sites suited to a mix of uses, provided they are attractive to the market.
25. It is also important to consider the quality of sites that form part of the supply, and this is once again assessed by Aspinall Verdi based on a scoring framework agreed with the Council. This finds all but three of the 35 identified sites to be at least ‘average’, with 11 – offering almost 43ha combined – classed as ‘good’ or ‘very good’. This does though mean that around two thirds of the existing land supply is no better than ‘average’ and given that a quantitative shortfall could already arise in certain scenarios – deemed the most representative – such a modest supply of quality land could ultimately deter investment and constrain local economic growth.
26. Consideration is finally given to the need for development to support the ‘*modern economy*’, with it specifically noted that:
 - **Manufacturing** continues to form an important part of the local economy, the growth and resilience of which is a key consideration for the Council, and as such it is anticipated that there will continue to be a sustained demand for new modern industrial floorspace. This recognises the evolving requirements of businesses operating in the **advanced manufacturing** sector as well as more traditional parts of the sector. In providing for this floorspace and with reference to the quality of many of the employment sites within or adjacent to existing employment estates it is recommended that the Council considers the opportunity to identify additional sites that meet occupiers’ evolving needs, which may include new campus style developments within appropriately sized sites that can

benefit from agglomeration benefits and proximity to appropriate academic institutions.

- Stoke-on-Trent has proven a strong market location for **logistics** occupiers over recent years. This recognises its proximity to the strategic road network, affirmed through sub-regional studies. This has manifested in strong take-up of more attractive sites in recent years and Aspinall Verdi anticipate that demand will be sustained. There are currently no 'strategic' sized sites (larger than 25ha) within the supply and other sites which are identified by Aspinall Verdi as having greater market appeal have become limited. It is therefore recommended the Council considers the opportunity to identify new sites which can respond to this need and demand. It is appreciated that such consideration should include collaboration with Newcastle-under-Lyme Borough Council recognising their shared functional linkages and the inclusion of a strategic employment site within the emerging Newcastle-under-Lyme Local Plan.
- There is evidence of a growing **digital** economy, including an application for the first **data centre** in Stoke-on-Trent. It is recommended that the Council continues to appraise specific land and floorspace requirements arising from the growth of this sector, recognising specific locational expectations and potential agglomeration benefits.
- The implications of a changing **office** market have been highlighted through the previous studies. There remains a degree of uncertainty in this regard but where there is comparatively modest quantified demand and potential sites suitable for office uses and mixed-use development it is recommended the Council monitors requirements in appraising the extent to which additional land is required to accommodate demands from the sector.

1. Introduction

- 1.1 Turley, Aspinall Verdi and Edge Analytics have been reappointed by Stoke-on-Trent City Council ('the Council') to assess the future need for housing and employment land in the city, over a plan period that is proposed to run from 2020 to 2040, albeit with modelling also presented to 2045 to understand trends thereafter.
- 1.2 This follows its previous collaboration with Newcastle-under-Lyme Borough Council – which saw the same team produce both a Housing Needs Assessment⁹ ('the original HNA') and Economic Needs Assessment¹⁰ ('the original ENA') in 2020 – and its subsequent commissioning of a Housing and Employment Needs Assessment Update (HENAU) for Stoke-on-Trent alone, in 2021¹¹.
- 1.3 The Council has since continued to develop a new Local Plan, having consulted on Issues and Options earlier that year and subsequently run a Regulation 18 consultation over six weeks to 21 October 2025¹². It commissioned separate evidence on housing needs prior to this, in the form of a Residential Mix Assessment (RMA) that was completed in July 2025¹³.
- 1.4 The RMA acknowledged the publication of a revised National Planning Policy Framework (NPPF) in December 2024, introducing a new standard method for assessing the minimum need for housing to replace the approach used in the HENAU¹⁴. It did not though consider whether there could be a greater need for housing, in excess of what is intended to be only a minimum, nor confirm whether such a level of provision would support likely job growth in Stoke-on-Trent.
- 1.5 It is for this reason that the Council has commissioned this further study, which draws upon the latest available information – including insights from a range of local stakeholders¹⁵ – to both establish the job growth that could occur in

⁹ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent

¹⁰ Turley (June 2020) Economic Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent

¹¹ Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent

¹² Stoke-on-Trent City Council (September 2025) Stoke-on-Trent Draft Local Plan 2020-2040: Regulation 18 Consultation Document

¹³ ORS (July 2025) Stoke-on-Trent Residential Mix Assessment

¹⁴ *Ibid*, paragraph 1.4

¹⁵ Ten virtual meetings were arranged between March and May 2026, with a mix of developers, registered providers and economic bodies (namely the Staffordshire Chambers of Commerce)

Stoke-on-Trent and consider the amount and mix of homes and employment land that could be needed to support it. This is generally done in the context of the latest NPPF, published in December 2024, albeit the Government is notably consulting on further changes at the time of writing and their potential impact is therefore also discussed where relevant¹⁶.

1.6 The report is structured as follows:

- **Section 2 – Review of the Housing Market Area** – a review of the functional relationships that Stoke-on-Trent has been previously found to share with other areas, most notably Newcastle-under-Lyme;
- **Section 3 – Recent Trends in Stoke-on-Trent** – a brief overview of how the population, economy, housing market and commercial property market have changed in Stoke-on-Trent since last being profiled;
- **Section 4 – Future Employment Growth** – reconsideration of the economic growth scenarios previously developed for Stoke-on-Trent, taking account of the latest trends and forecasts as well as the views of local businesses;
- **Section 5 – Future Need for Housing** – confirmation of the minimum need for housing now suggested by the standard method, exploring how this could change the population of Stoke-on-Trent and whether there is evidence of a greater need;
- **Section 6 – Size and Type of Housing Needed** – reconsideration of the mix of housing needed, drawing upon the latest available information;
- **Section 7 – Need for Affordable Housing** – a further assessment of the specific need for affordable housing, building upon the most recent calculation in the RMA;
- **Section 8 – Specific Housing Needs** – further analysis of the specific housing needs of distinct groups, building upon the RMA;
- **Section 9 – Need for Employment Land** – a recalculation of the amount and type of employment land needed in Stoke-on-Trent, last considered in the HENAU, with an updated comparison against supply; and
- **Section 10 – Summary and Conclusions** – a concise overview of the report’s findings and their implications for the emerging Local Plan.

¹⁶ Ministry of Housing, Communities and Local Government (December 2025) National Planning Policy Framework: proposed reforms and other changes to the planning system

2. Review of the Housing Market Area

- 2.1 The NPPF originally required Local Plans to meet *‘the full, objectively assessed needs for market and affordable housing in the housing market area’*¹⁷. This led previous studies to establish the housing market area of which Stoke-on-Trent formed part, by reviewing migration trends, house prices and commuting patterns. The last such review – in the Strategic Housing Market Assessment (SHMA) of 2015 – concluded that Stoke-on-Trent and Newcastle-under-Lyme formed *‘a single housing market area’*, at least for the purposes of assembling evidence at that time¹⁸.
- 2.2 Over ten years have passed since this conclusion was reached, with the housing market area having not been reviewed either in the original HNA that was jointly commissioned with Newcastle-under-Lyme Borough Council in 2020, or in the HENAU produced only for Stoke-on-Trent a year later¹⁹. It has equally not been considered in the evidence separately produced for Newcastle-under-Lyme²⁰.
- 2.3 While house prices will have inevitably changed in the intervening period – with new data also becoming available on commuting and migration patterns – it is also the case that the significance of housing market areas has diminished in this time. They have not been referenced in the NPPF since 2018, when the standard method was introduced and could be used consistently by all local authorities, removing the need to align approach with selected neighbours. The Government acknowledged at the time that this standardisation effectively *‘shifts the focus away from housing market areas’*²¹.
- 2.4 It is though still beneficial to understand the relationships that Stoke-on-Trent shares with other areas, including Newcastle-under-Lyme, and it is for this reason that the Council has requested high-level consideration of the housing market area geography as part of this study. This has been undertaken in the context of unchanged guidance that is now located in the “plan-making” section

¹⁷ Department for Communities and Local Government (March 2012) National Planning Policy Framework, paragraph 47

¹⁸ Turley (July 2015) Strategic Housing Market Assessment: Stoke-on-Trent City Council and Newcastle-under-Lyme Borough Council, paragraph 2.5

¹⁹ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent; Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent

²⁰ Turley (March 2023) Housing and Economic Needs Assessment Update: Newcastle-under-Lyme; Turley (April 2024) Newcastle-under-Lyme Housing and Economic Needs Assessment: Further Update

²¹ DCLG (September 2017) Planning for the right homes in the right places: consultation proposals, paragraph 68

of the Government's Planning Practice Guidance (PPG) which continues to encourage consideration of migration, commuting patterns and house prices²².

Migration

- 2.5 When the housing market area was last reviewed in the SHMA of 2015, it was observed – from what was then the latest available evidence – that around two thirds (67%) of those moving from homes in Stoke-on-Trent in the year prior to the 2011 Census remained within the city, rising to around 75% when including moves to Newcastle-under-Lyme²³. While its '*strongest*' relationship was indeed with the latter, both authorities were also found to have links with Stafford, Cheshire East and Staffordshire Moorlands²⁴.
- 2.6 Newer data from the latest Census – undertaken in March 2021 – is now available, providing a more up-to-date position even if this will have likely been skewed to some extent by the COVID-19 pandemic²⁵.
- 2.7 This suggests that there has been a modest reduction in the proportion of moving residents who remain in Stoke-on-Trent, from around 67% to circa 62%.
- 2.8 This meant that residents were increasingly minded to move elsewhere, with each of the areas noted in the SHMA – and mentioned above – attracting at least a slightly greater share of those moving from addresses in the city. Newcastle-under-Lyme remained the leading destination, beyond Stoke-on-Trent itself, but Cheshire East saw the sharpest increase in proportionate terms.

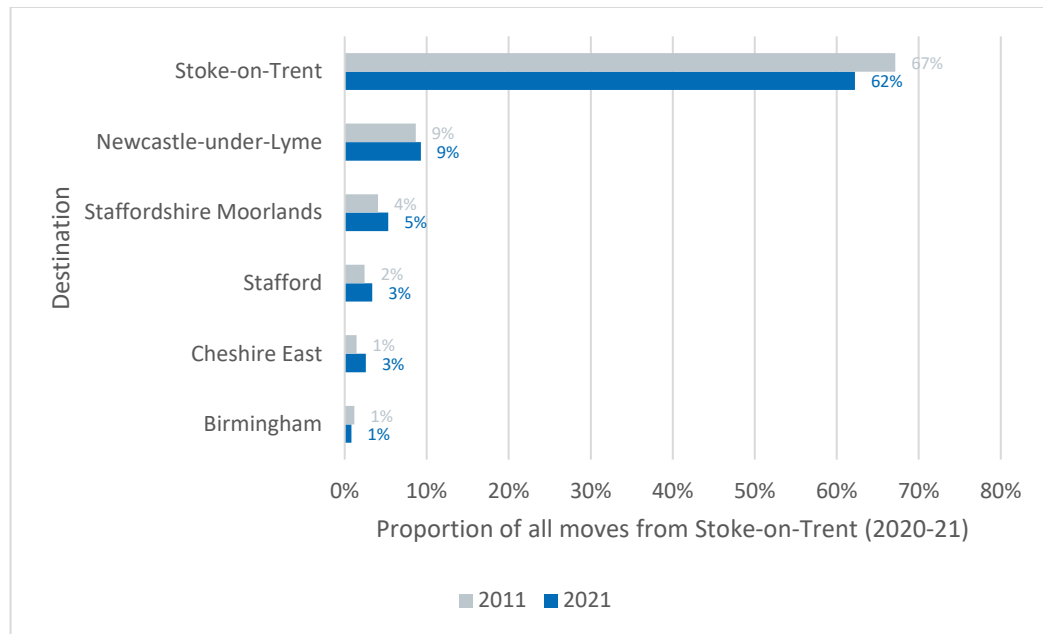
²² PPG Reference ID 61-018-20190315

²³ Turley (July 2015) Strategic Housing Market Assessment: Stoke-on-Trent City Council and Newcastle-under-Lyme Borough Council, paragraph 2.4

²⁴ *Ibid*

²⁵ Individuals' ability to move during the year to March 2021 may have been initially restricted by the effective shutdown of the housing market, which lasted for around seven weeks until 12 May 2020. Their choices may also have been influenced by the various lockdowns that were in place over the year

Figure 2.1: Containment of Moves from Stoke-on-Trent (2011/21)



Source: Census 2011; Census 2021

- 2.9 These moves were though often offset by people moving in the opposite direction, with the SHMA having previously explored this in reporting both gross and net flows, respectively showing '*the strength and direction of migration flows between authorities*'²⁶. Repeating this exercise – again using data from the 2021 Census – confirms that it remained the same five areas that shared the strongest migratory relationship with Stoke-on-Trent, in the same order. Those moving *to* these areas *from* the city generally continued to outnumber those moving in, with the size of the net outflow actually increasing in most instances, albeit not in the case of Birmingham where the relationship appears to have shifted – at least in this particular year – to favour Stoke-on-Trent.

²⁶ Turley (July 2015) Strategic Housing Market Assessment: Stoke-on-Trent City Council and Newcastle-under-Lyme Borough Council, Appendix 2, p4-5

Table 2.1: Largest Migration Flows and Direction of Net Flow (2011/21)

	Moves between areas in 2011	Moves between areas in 2021	Net flow into Stoke-on- Trent in 2011	Net flow into Stoke-on- Trent in 2021
Newcastle-under-Lyme	4,336	3,868	-200	-356
Staffordshire Moorlands	1,874	2,053	-248	-363
Stafford	1,230	1,284	-34	-244
Cheshire East	729	956	-19	-216
Birmingham	506	432	-106	+66

Source: Census 2011; Census 2021

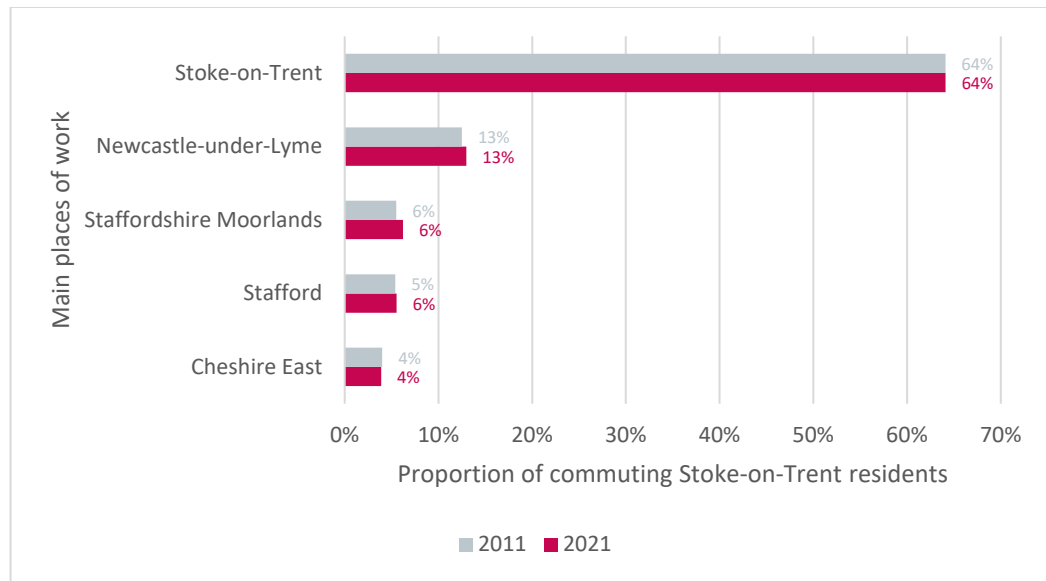
Commuting

- 2.10 The SHMA also considered commuting data from the 2011 Census, reporting that almost two thirds (64%) of employed residents of Stoke-on-Trent worked in the city at that point. This rose to 77% when including those who worked in Newcastle-under-Lyme²⁷.
- 2.11 Equivalent data from the 2021 Census is again now available, albeit this too will have been influenced to at least some extent by the pandemic.
- 2.12 When again discounting those working from home – as previously – it can be observed that 64% of commuting residents stayed in Stoke-on-Trent for work, with this figure not having changed when rounded. There has likewise been little change in the proportion travelling to other areas, with those identified in the SHMA remaining prevalent in exactly the same order²⁸.

²⁷ *Ibid*, Figure 2.8 of Appendix 2

²⁸ *Ibid*, Figure 2.9 of Appendix 2

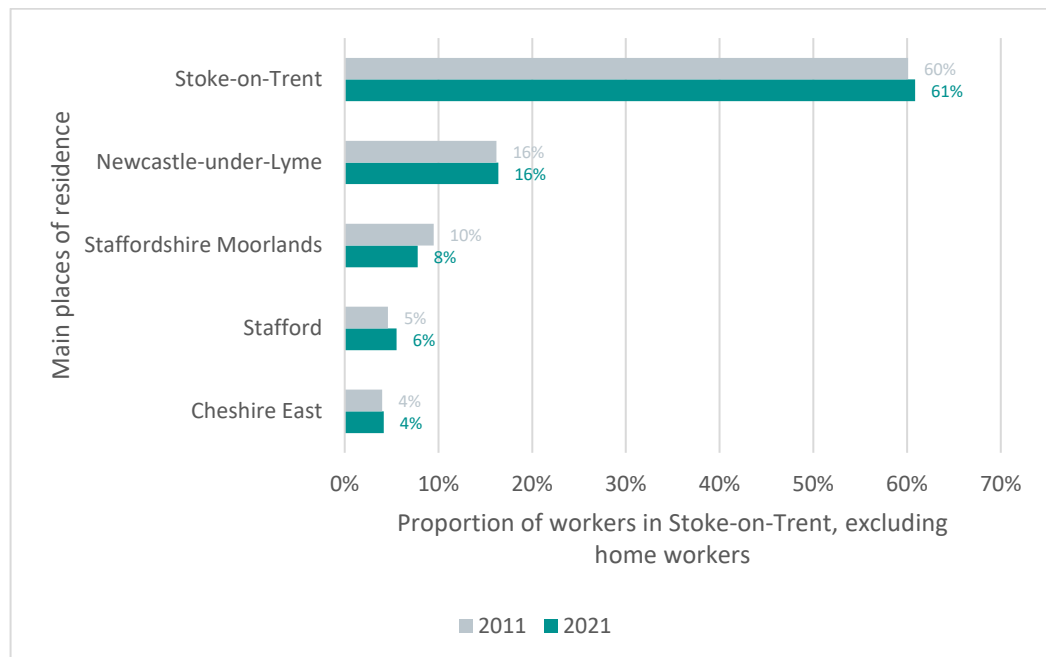
Figure 2.2: Places of Work for Commuting Stoke-on-Trent Residents (2011/21)



Source: Census 2011; Census 2021

- 2.13 It was also still the case that most jobs at workplaces in Stoke-on-Trent were filled by the city's residents, with this being true of 60% of all jobs in 2011 and 61% in 2021. Workers were though increasingly drawn from Stafford, with fewer attracted from Staffordshire Moorlands.

Figure 2.3: Places of Residence for Stoke-on-Trent Workers (2011/21)



Source: Census 2011; Census 2021

House prices

- 2.14 The PPG continues to view house prices and the rate of change as indicators of *‘the relationship between housing demand and supply across different locations’*, in turn enabling the identification of *‘areas which have clearly different price levels compared to surrounding areas’*²⁹.
- 2.15 The SHMA previously noted that house prices in Stoke-on-Trent were *‘typically lower than in neighbouring authorities’*, albeit sharing some similarities with Newcastle-under-Lyme where values were *‘also relatively low having seen the lowest level of growth during the decade prior to the recession’*³⁰. The fact that prices in each area were *‘towards the lower end of the averages for neighbouring authorities’* led the SHMA to conclude that they shared *‘similar market characteristics’*, even with average prices having *‘historically been lower’* in Stoke-on-Trent³¹.
- 2.16 While these observations were based on average house prices in 2012 – reported by what was then the Department for Communities and Local Government³² (DCLG) – they do continue to be reinforced by the latest available data, now published by the Land Registry³³. Complete data for 2025, as the last complete calendar year, is not available at the time of writing but Figure 2.4 does show that the average price paid for housing in Stoke-on-Trent has been markedly lower than in neighbouring areas in each of the prior ten years to 2024. Newcastle-under-Lyme continues to have the next-lowest prices on average, albeit while typically being roughly a third (35%) higher. The growth of 42% that has been seen in Stoke-on-Trent over this period back to 2015 does though compare to neighbouring areas, which have themselves seen growth of between 34% and 46%.

²⁹ PPG Reference ID 61-018-20190315

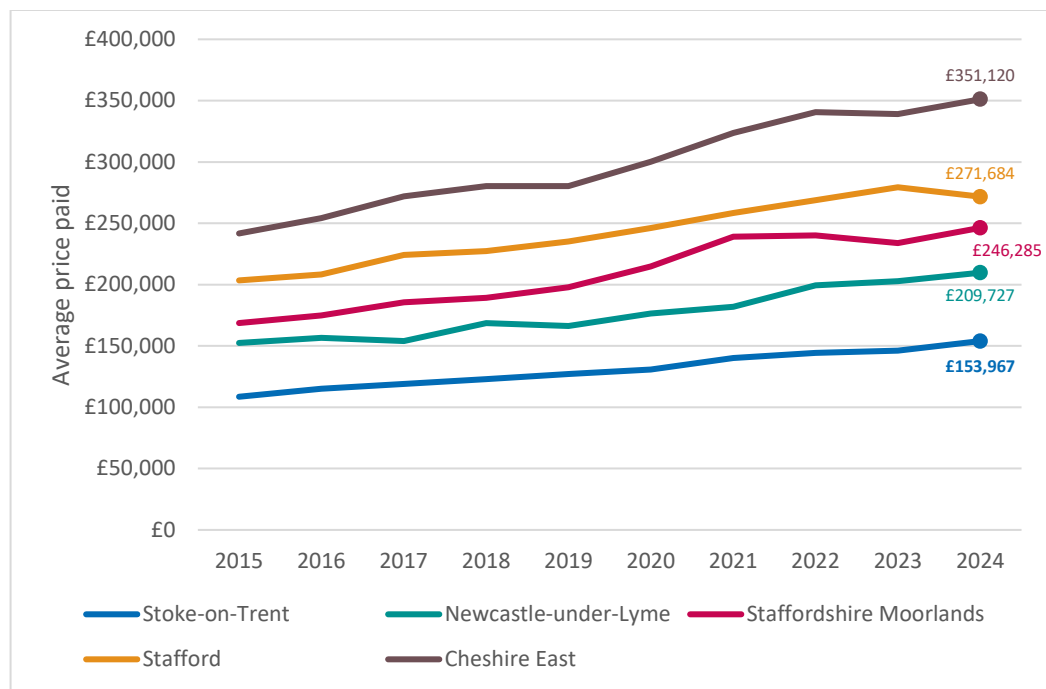
³⁰ Turley (July 2015) Strategic Housing Market Assessment: Stoke-on-Trent City Council and Newcastle-under-Lyme Borough Council, paragraph 2.4

³¹ *Ibid*

³² *Ibid*, Figure 2.6 of Appendix 2

³³ Land Registry (2025) Price paid data

Figure 2.4: Comparing the Average Price Paid for Housing (2015-24)



Source: Land Registry; Turley analysis

Summary

- 2.17 Stoke-on-Trent has been previously found, in 2015, to share a housing market area with Newcastle-under-Lyme. While changes to national policy have since reduced the significance of such geographies, there remains value in understanding an area's relationship with its neighbours, and the Council has therefore requested a high-level reconsideration of the position.
- 2.18 Stoke-on-Trent was previously observed as having retained around 67% of those residents that moved home in the year prior to the 2011 Census, but this reduced to circa 62% in the equivalent period to the latest 2021 Census. It has though remained the same areas that most often attract residents, namely Newcastle-under-Lyme, Staffordshire Moorlands, Stafford and Cheshire East. Moves in the opposite direction – to Stoke-on-Trent – did not offset these outflows but were sufficiently common for the same areas to also rank highest when considering *gross flows*, in either direction.
- 2.19 Stoke-on-Trent was also previously found to retain around 64% of its resident workforce, as of the 2011 Census, with these individuals in turn filling around 60% of jobs in the city's workplaces. These figures were effectively unchanged at the 2021 Census, when again discounting those working from home, with only the latter rising marginally to 61%. Neighbouring areas have also generally continued to attract the same proportion of workers – and export the same proportion of their own resident labour – as in 2011, with Newcastle-under-Lyme continuing to particularly stand out in each case.

- 2.20 House prices in Stoke-on-Trent were noted as being generally lower than in neighbouring areas, sharing the most similarities with Newcastle-under-Lyme, when the housing market area was last reviewed. While based on average prices in 2012, this remained the case in 2024 as the last calendar year for which such data is available. Prices even in Newcastle-under-Lyme have tended to be roughly a third higher over the prior ten years, albeit Stoke-on-Trent has generally matched neighbours' rates of growth over the same period.
- 2.21 The above does not suggest that there has been a significant shift in the functional relationships that Stoke-on-Trent shares with other areas, since it was found to have the strongest links with Newcastle-under-Lyme in 2015. The Council should therefore continue to be mindful of this relationship – plus its enduring, if lesser, links with Staffordshire Moorlands, Stafford and Cheshire East – as it further develops its new Local Plan.

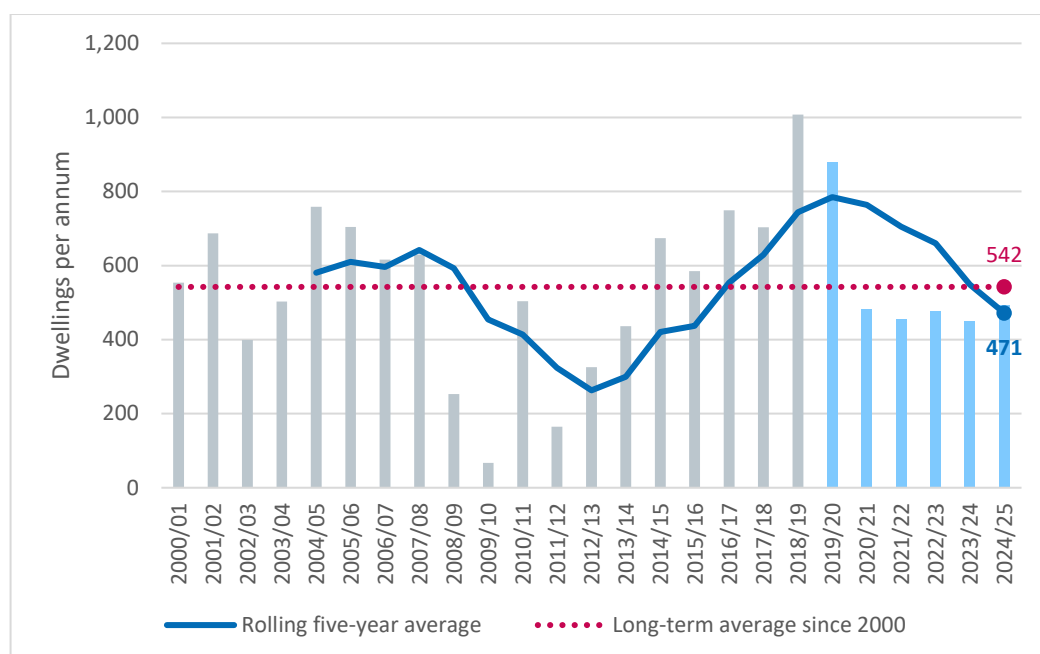
3. Recent Trends in Stoke-on-Trent

- 3.1 The original HNA and the original ENA, both produced in 2020, used what was then the latest available data to profile the population, housing market, economy and commercial property market of Stoke-on-Trent at that point. Their dynamic nature means that each will have inevitably seen further changes in the intervening period, which this section therefore looks to consider.

Further but slowing growth of the housing stock

- 3.2 The original HNA cited the Council's monitoring in reporting, at its Figure 4.6, that an average of 559 homes had been completed annually in Stoke-on-Trent over a 'long-term' period from 2000 to 2019. This was though noted as having risen to 744 dwellings per annum over what were then the five most recent years, from 2014 to 2019.
- 3.3 The Council's further monitoring – now available to March 2025 – confirms that delivery has subsequently reduced, with the last five reported years seeing an average of only 471 homes completed annually. This is the lowest average over any such period since 2016 and is roughly a third below the recent peak. This fall in delivery has caused the long-term average, again calculated back to 2000, to slightly reduce to circa 542 dwellings per annum.

Figure 3.1: Net Completions in Stoke-on-Trent (2000-25)

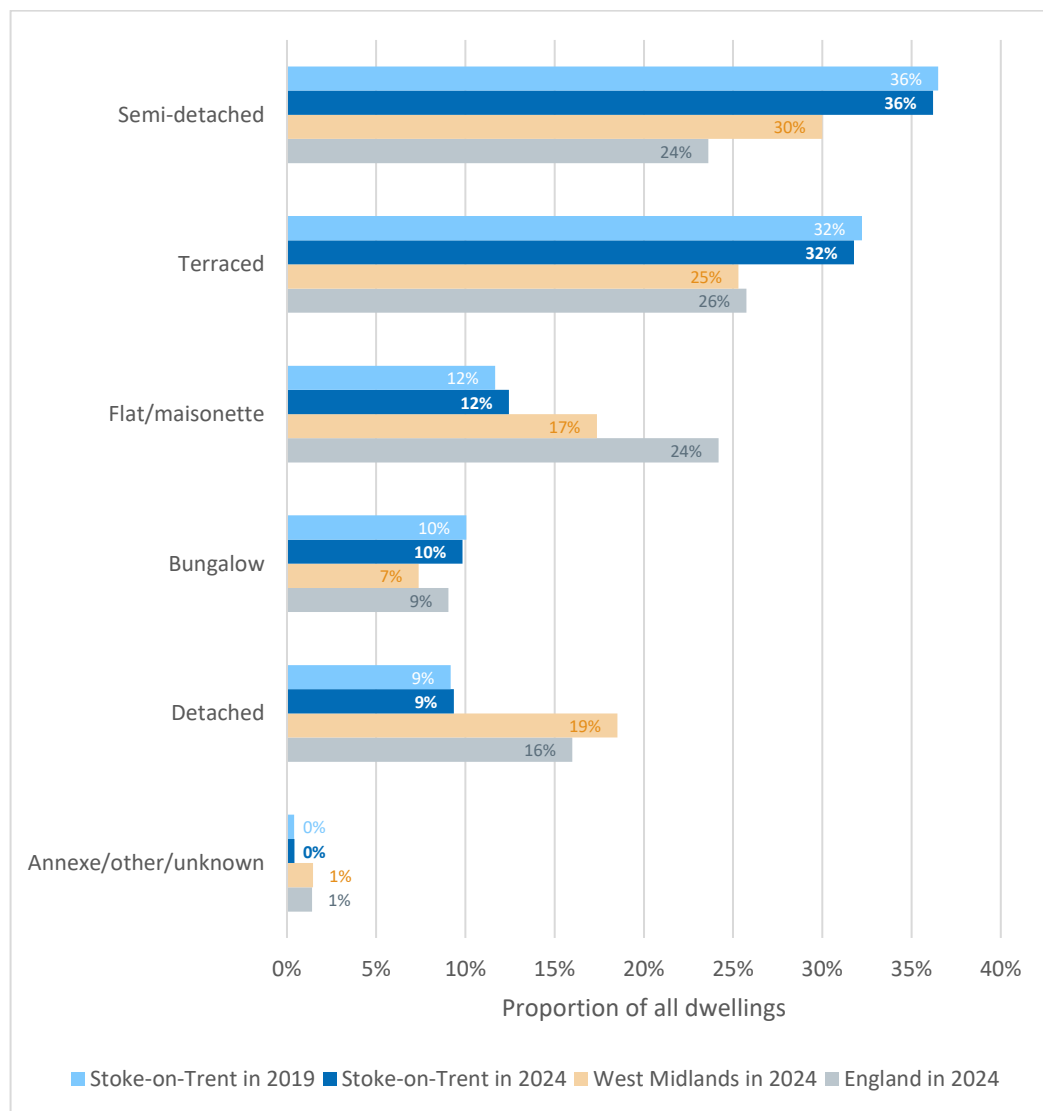


Source: Council monitoring

- 3.4 The homes completed since 2019 have though only grown the overall housing stock by less than 3% meaning that it will largely remain as profiled in section 2

of the original HNA, which focused on that year as the latest for which data was then available³⁴. Equivalent data from the Valuation Office Agency (VOA) has not yet been published for 2025, but as of the prior year Stoke-on-Trent continued to be particularly characterised by its offer of terraced and semi-detached houses, when compared to the West Midlands and England as a whole³⁵. It also continues to have fewer flats and detached houses than is typically the case in these areas, even with such homes becoming very slightly more prevalent.

Figure 3.2: Housing Stock by Type (2019/24)



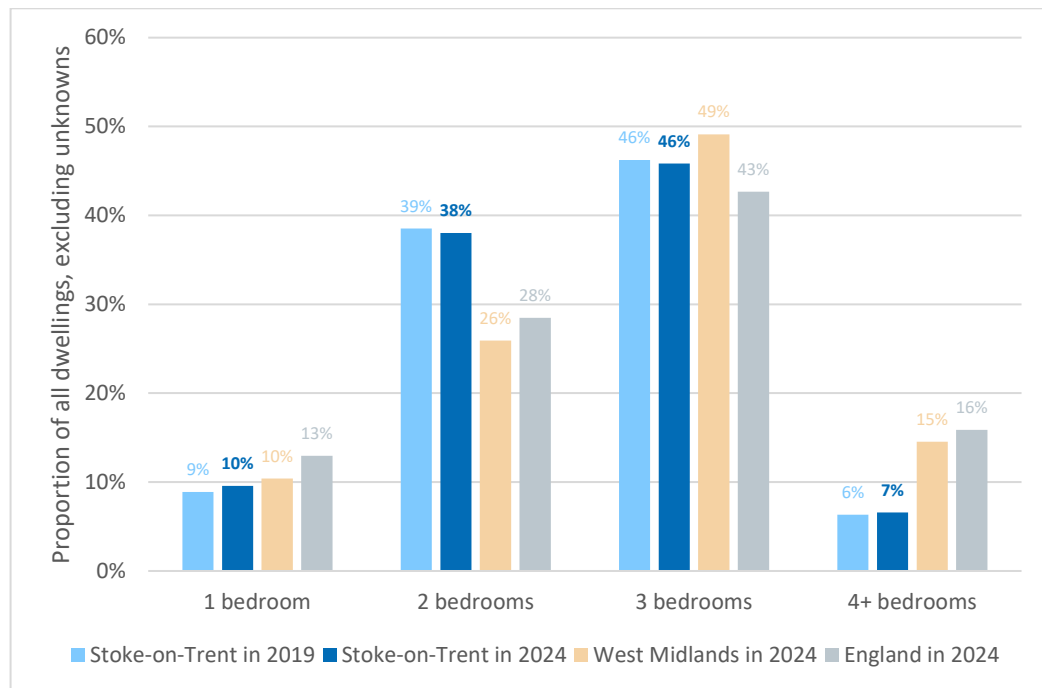
Source: VOA

³⁴ MHCLG (May 2025) Table 125: dwelling stock estimates by local authority district; Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, p4-5

³⁵ VOA (October 2024) Council Tax: stock of properties, 2024

- 3.5 Homes in Stoke-on-Trent also continue to most often have three bedrooms, to an extent that sits roughly midway between the regional and national averages. Homes with two bedrooms continue to be more prevalent than is seen in these areas, whereas there remain fewer with only one or at least four especially.

Figure 3.3: Housing Stock by Number of Bedrooms (2019/24)



Source: VOA

Continued population growth

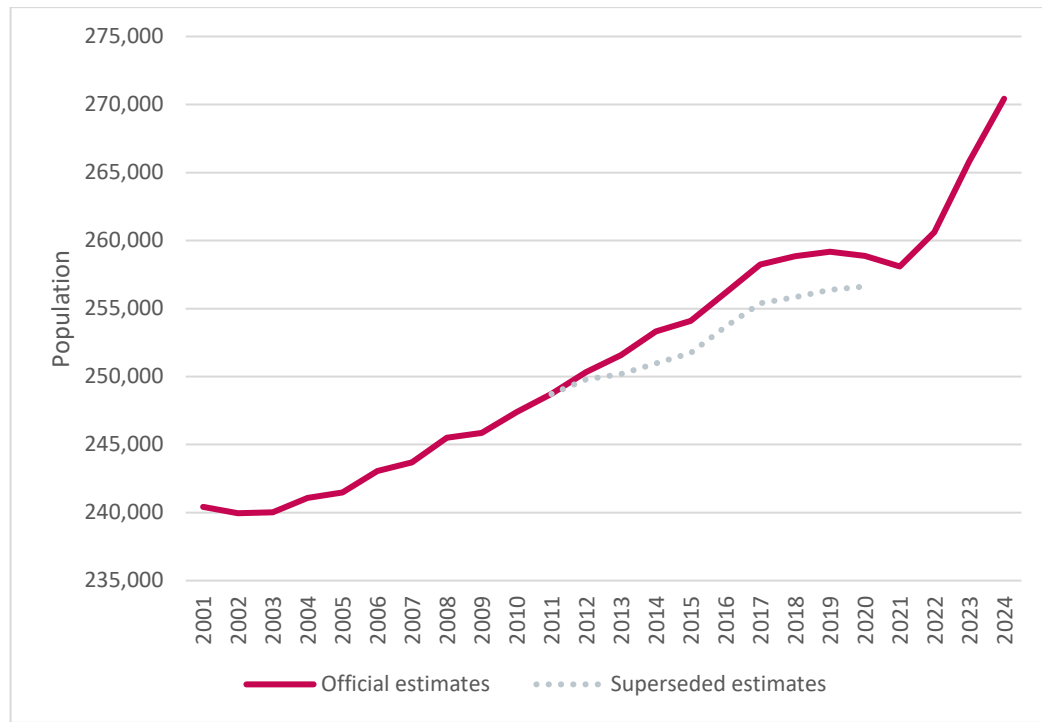
- 3.6 The original HNA reported that the population of Stoke-on-Trent was estimated as having steadily grown in the years prior to its production³⁶. This was according to the Office for National Statistics (ONS) whose official population estimates were at that time available, at least provisionally, to 2019.
- 3.7 It has though since reviewed these estimates to account for the latest Census, in 2021, which provided a more authoritative count of the population. In the case of Stoke-on-Trent, the Census recorded more residents than the ONS had been previously estimating, and this led it to increase those earlier estimates to align with that count³⁷. It has also continued to produce further estimates of the population, up to and including 2024 at the time of writing, and these

³⁶ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, paragraph 2.16

³⁷ ONS (November 2023) Rebasement of mid-year population estimates following Census 2021, England and Wales

suggest that growth has accelerated since 2021 with the city's population increasing by around 5% in the space of only three years³⁸.

Figure 3.4: Estimated Population of Stoke-on-Trent (2001-24)



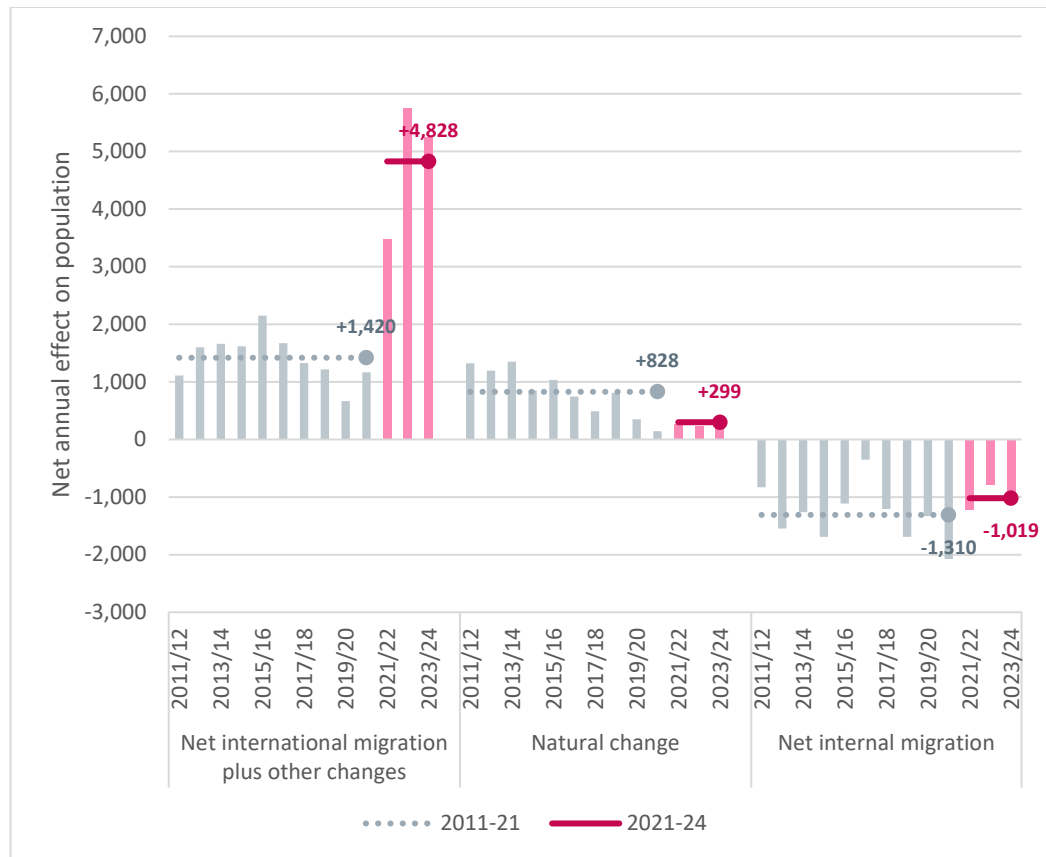
Source: ONS

- 3.8 Recent growth is reported to have been largely driven by net international migration, with the average annual inflow over the last three years estimated to have been over three times larger than was typical over the prior decade³⁹. There has though also been a smaller net outflow to other parts of the UK, albeit this has been fully offset by there being less “natural change” as deaths have become more balanced with births.

³⁸ ONS (July 2025) Estimates of the population for England and Wales

³⁹ This includes “other changes” arising from the underestimation of population growth before the 2021 Census took place, since this can most likely be attributed to international migration as the most challenging for the ONS to estimate

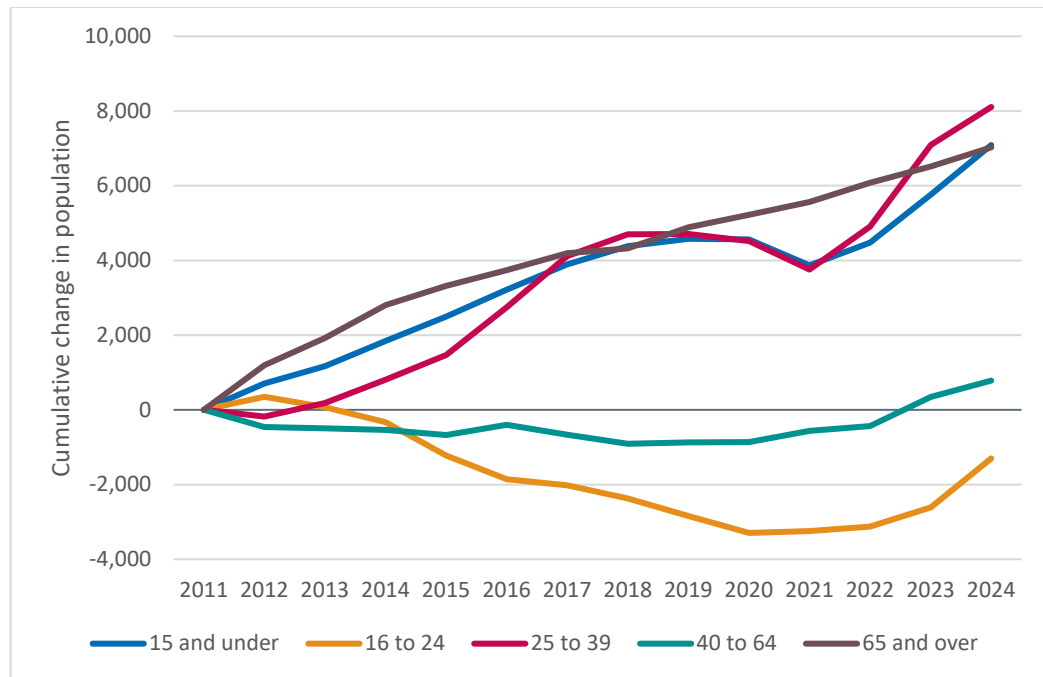
Figure 3.5: Components of Population Change in Stoke-on-Trent (2011-24)



Source: ONS

- 3.9 These trends appear to have particularly accelerated the growth of the cohort aged 25 to 39, which had previously been in decline after a period of growth. It has also brought growth in the number of children, as would arguably be expected where many individuals of this age have families. Growth has also been seen amongst those aged 16 to 24 and 40 to 64, albeit only in the case of the latter has this fully compensated for an earlier decline such that the cohort is now larger than it was in 2011. The older population, aged 65 and above, has notably seen a steadier pace of growth over the last reported decade.

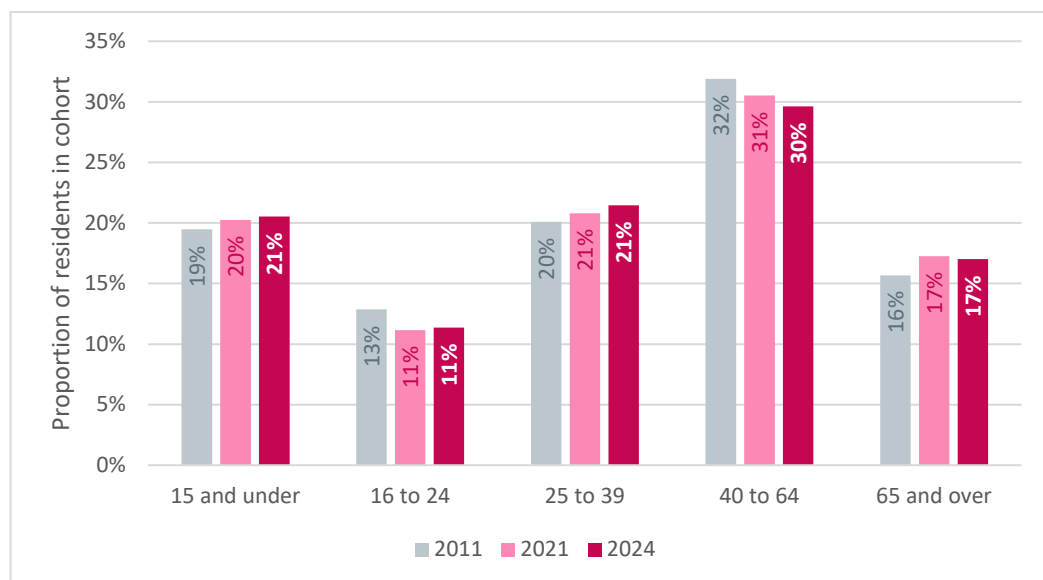
Figure 3.6: Population Change by Age Cohort (2011-24)



Source: ONS

- 3.10 These trends have though only subtly changed the overall age profile of Stoke-on-Trent. Fewer residents are now aged 40 to 64, or indeed 16 to 24, although recent growth in the latter has brought a slight recovery since 2021. Recent trends have also served to offset the growth of the older population, aged 65 and above, with the proportion of residents sitting within this cohort having risen to 2021 but slightly fallen since.

Figure 3.7: Change in Age Profile of Stoke-on-Trent (2011-24)

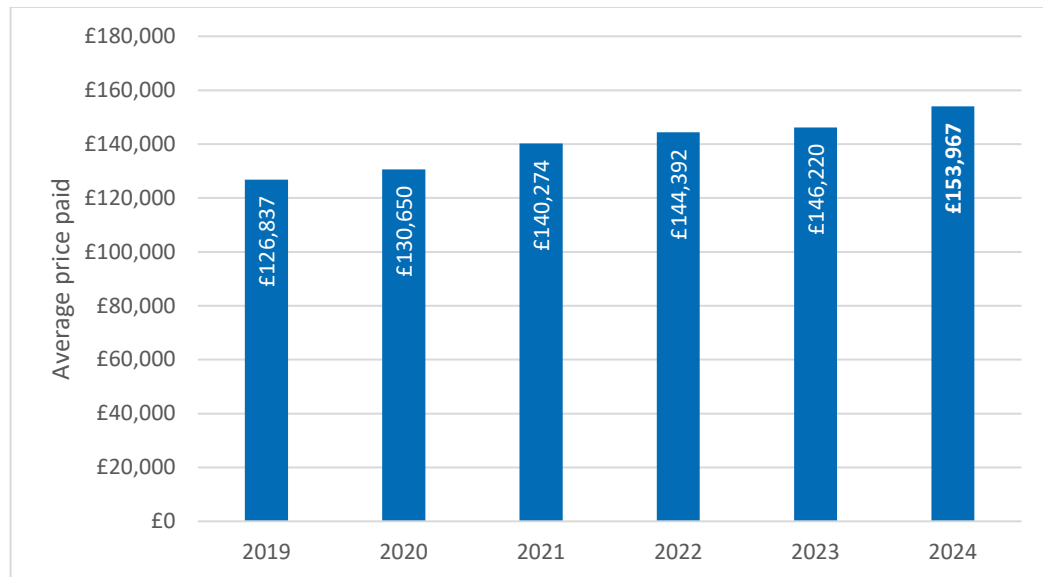


Source: ONS

Rising house prices and rents

- 3.11 Data published by the Land Registry confirms that an average of £153,967 was paid to purchase housing in Stoke-on-Trent in 2024, the last year to have been completely reported at the time of writing. This is some 21% higher than in 2019, as reported – using the same source – by the original HNA, with the average having notably risen in each of the intervening five years⁴⁰.

Figure 3.8: Change in Mean Price Paid for Housing in Stoke-on-Trent (2019-24)



Source: Land Registry; Turley analysis

- 3.12 The original HNA acknowledged '*longstanding ambitions regarding higher value housing in this area*' and consequently presented further analysis on the distribution of property values⁴¹. It confirmed that a quarter of properties sold throughout Stoke-on-Trent in 2019 cost at least £155,000 and that 10% cost at least £210,000⁴². Both of these figures – respectively the upper quartile and tenth decile – were higher in 2024, having grown by slightly more (23/24%) than the mean price paid (22%) in a possible sign of momentum at the upper end of the market. This is notably supported by at least one of the organisations engaged as part of this study, with a private developer reporting increased demand for higher-quality family housing.

⁴⁰ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, Table 2.2

⁴¹ *Ibid*, paragraph 2.32

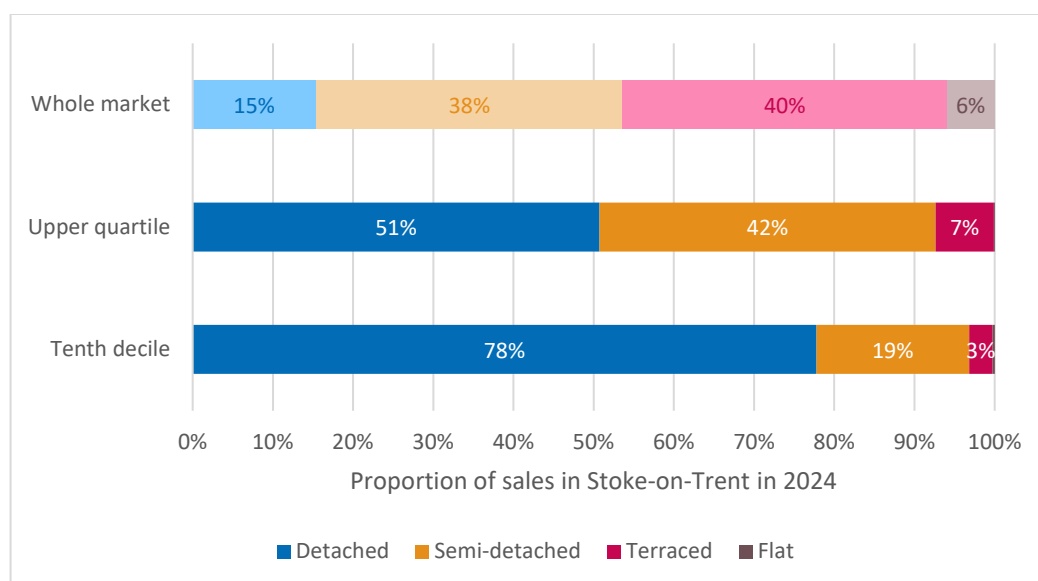
⁴² *Ibid*, Figure 2.16

Table 3.1: Price Paid at Upper End of Market (2019-24)

	2019	2024	Change
Upper quartile	£155,000	£190,000	+23%
Tenth decile	£210,000	£260,000	+24%

Source: Land Registry; Turley analysis

- 3.13 As was previously observed for the whole study area by the original HNA, it is detached properties that are most often bought at the upper end of the market in Stoke-on-Trent⁴³. Such homes accounted for 78% of the highest-value sales in 2024 compared to only 15% across the market as a whole. Only around a fifth (19%) involved semi-detached properties, but it is notable that these were more commonly bought in the top 25% of sales – rather than just the top 10% – and indeed their representation in that quartile was not dissimilar to the market as a whole, at 42% and 38% respectively.

Figure 3.9: Benchmarking Types of Properties Sold in Stoke-on-Trent (2024)

Source: Land Registry; Turley analysis

- 3.14 While the original HNA also introduced data on monthly rents⁴⁴ – originally from the ONS and then the VOA – this has now been discontinued, and effectively replaced with a new dataset from the ONS⁴⁵. This reports only on the mean monthly rent – rather than the previously reported medians and lower quartiles – but does suggest that costs have risen to an average of £698

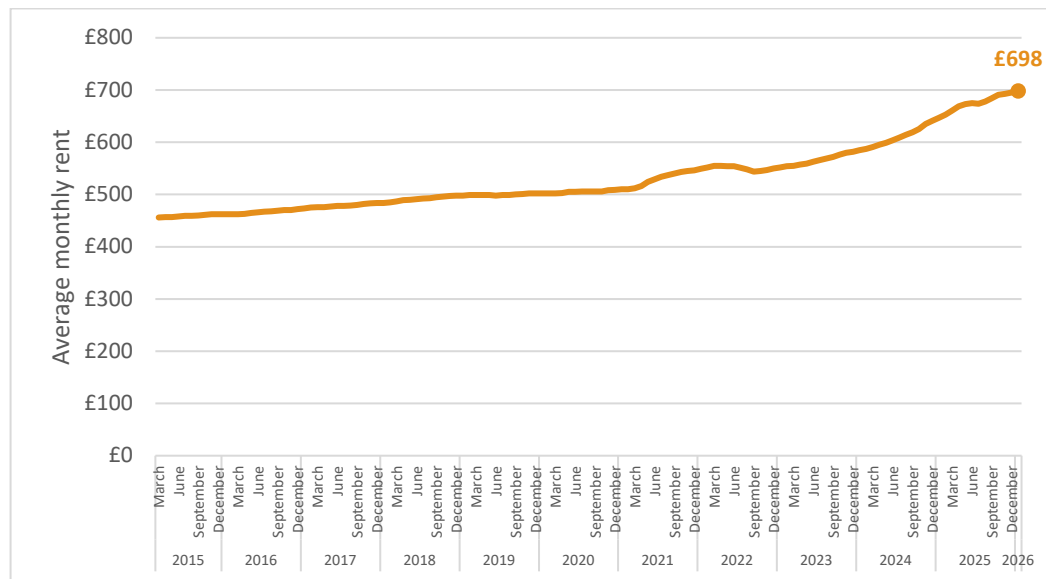
⁴³ *Ibid*, Figure 2.19

⁴⁴ *Ibid*, Table 2.3

⁴⁵ ONS (February 2026) Price Index of Private Rents, UK: monthly price statistics

per month, as of January 2026, compared to £510 five years ago. Closer examination confirms that it was in the year to January 2022 that growth initially occurred, at a rate of around 8%, and although it slowed and the average rent fell later that year, growth subsequently resumed and has been largely sustained since. The year to January 2025 saw the greatest rise, of around 11%.

Figure 3.10: Mean Private Rent in Stoke-on-Trent (2015-26)



Source: ONS

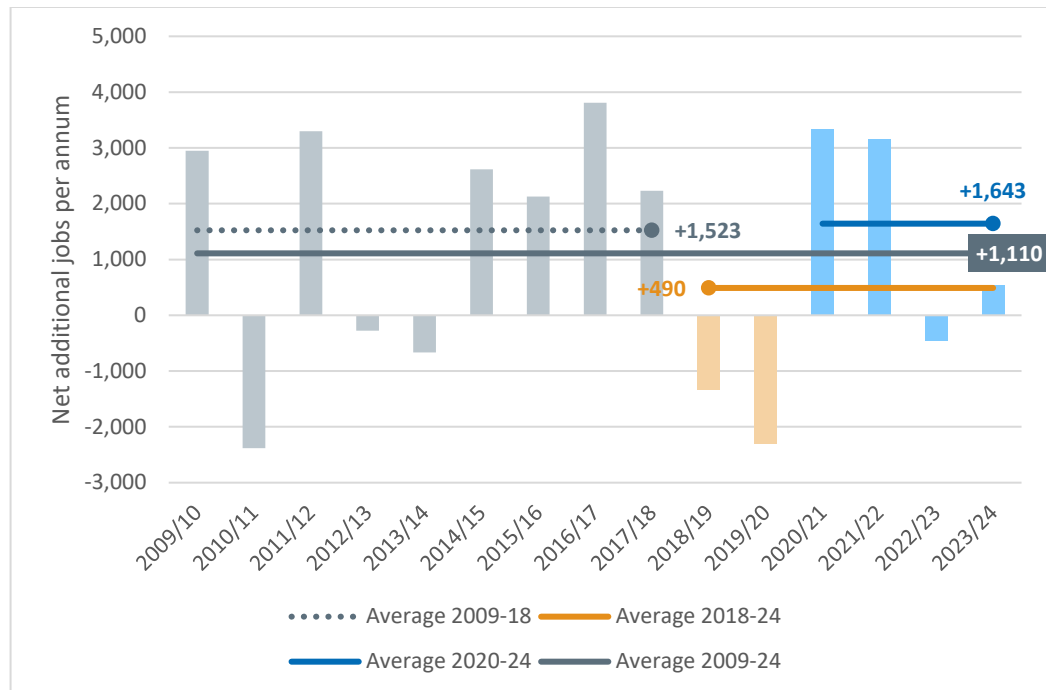
Employment growth

- 3.15 The original ENA cited the Business Register and Employment Survey (BRES) – then, as now, regarded as *‘the official source of employee estimates by detailed geography and industry’*⁴⁶ – in reporting that Stoke-on-Trent had created an average of 1,610 jobs per annum between 2009 and 2018, the latest year then reported⁴⁷.
- 3.16 Historic revisions have led to this figure being retrospectively lowered, to around 1,523 jobs per annum, but even this is over three times the job creation reported to have occurred on average throughout the additional six years to 2024 that are now covered by the BRES – around 490 jobs per annum. This appears to have been particularly impacted by an initial two years of job losses, up to 2020, since which point the average (1,643pa) has actually been higher even than the figure reported in the original ENA. The longer-term average, back to 2009, now stands at circa 1,110 jobs per annum.

⁴⁶ Business Register and Employment Survey - Office for National Statistics

⁴⁷ Turley (June 2020) Economic Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, Table 4.1

Figure 3.11: Employment Growth in Stoke-on-Trent (2009-24)

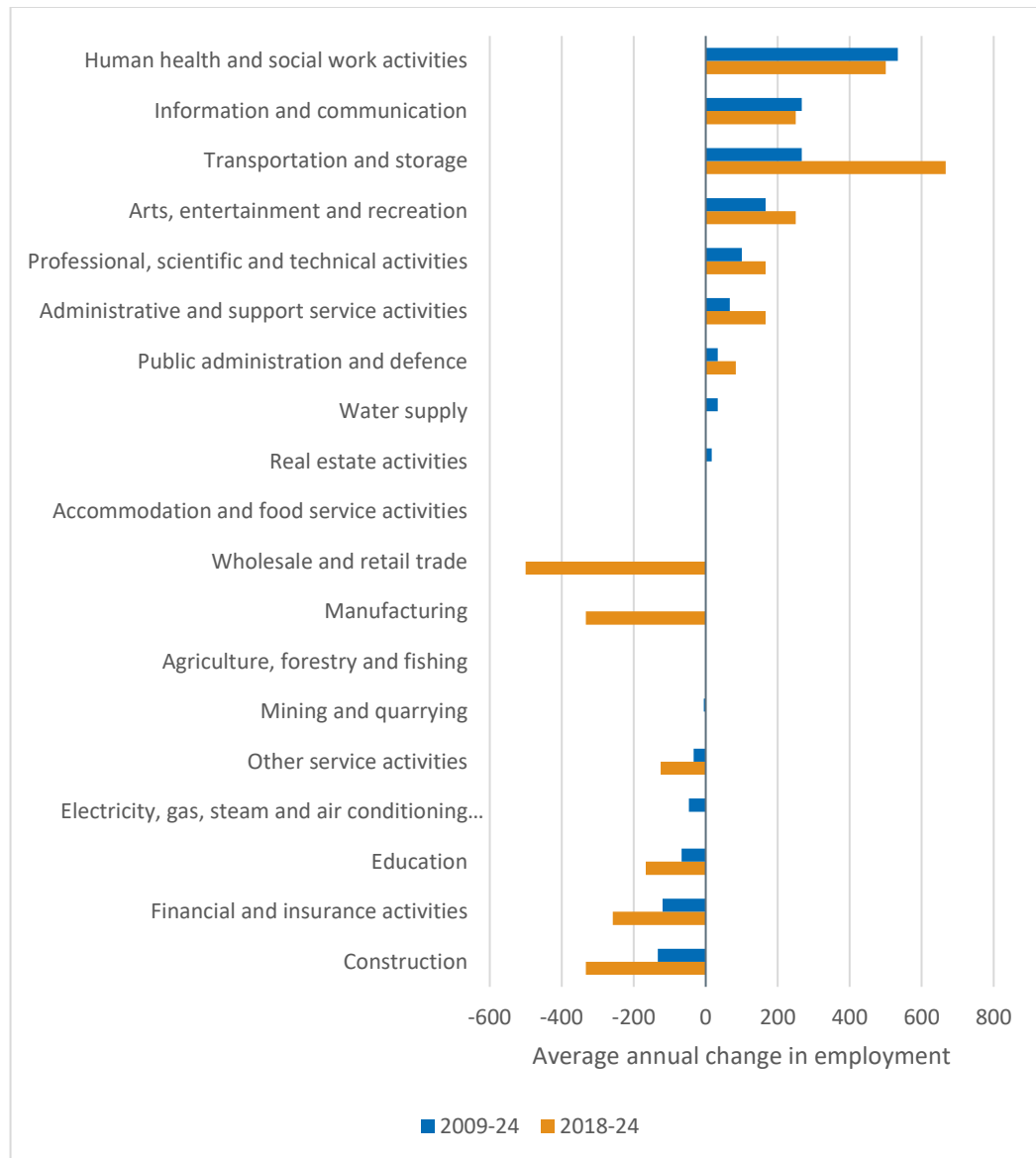


Source: BRES

- 3.17 It is still the human health and social work sector that has created the most jobs in Stoke-on-Trent since 2009, as was reported by the original ENA, with information and communication as well as transportation and storage also standing out, the latter having created more jobs than any other sector since 2018. Several sectors are implied to have contrastingly *declined* since the same point, including manufacturing and wholesale and retail which were notably amongst the best performing when the original ENA was produced⁴⁸.

⁴⁸ *Ibid*, Table 4.2

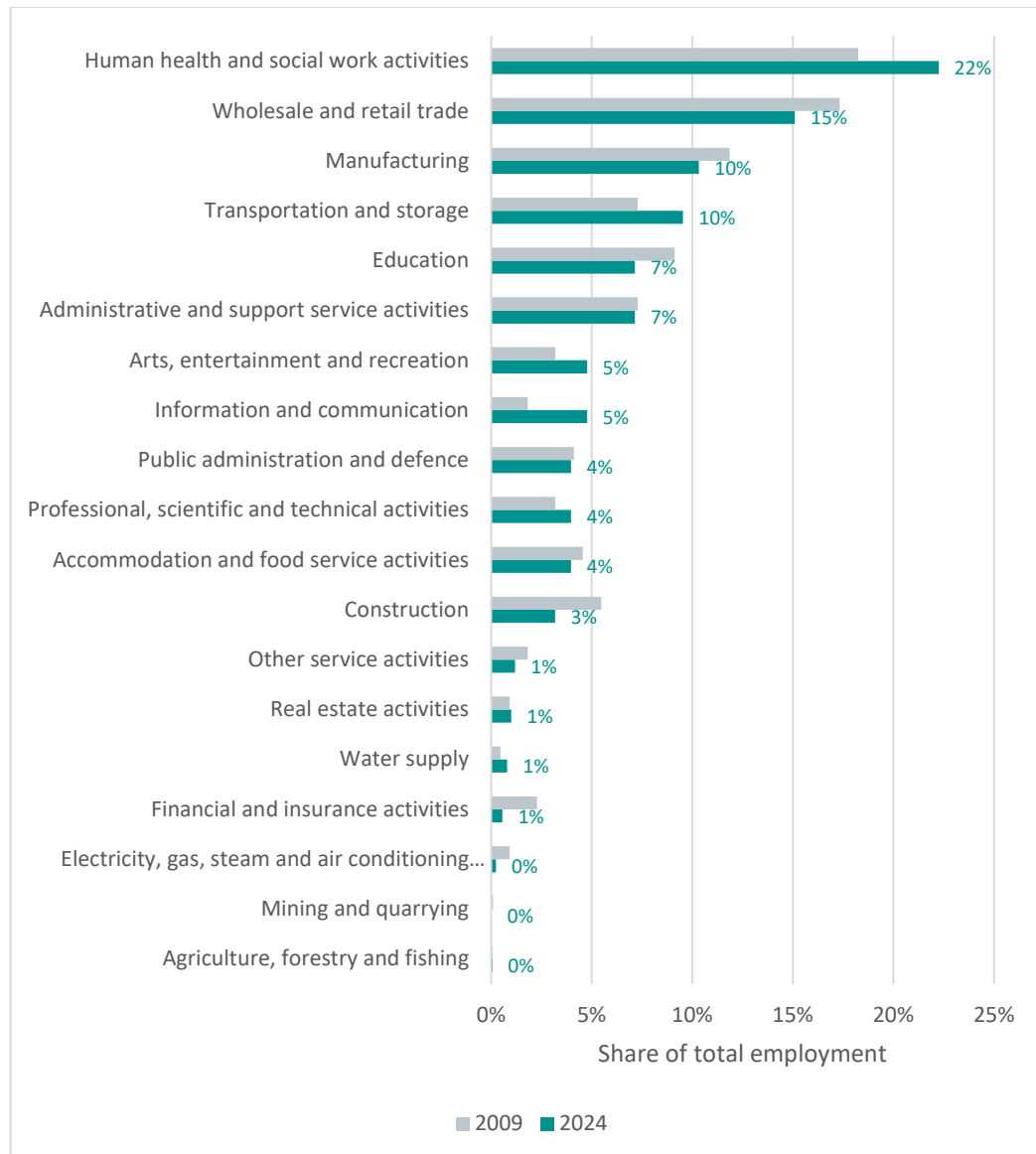
Figure 3.12: Average Annual Change in Employment by Sector



Source: BRES

- 3.18 These sectors do though continue to employ more than virtually any other, aside from human health and social work, even if their shares are shrinking while that of the latter grows. Both information and communication and transportation and storage have also become more prominent since 2009.

Figure 3.13: Employment in Stoke-on-Trent by Sector (2009-24)



Source: BRES

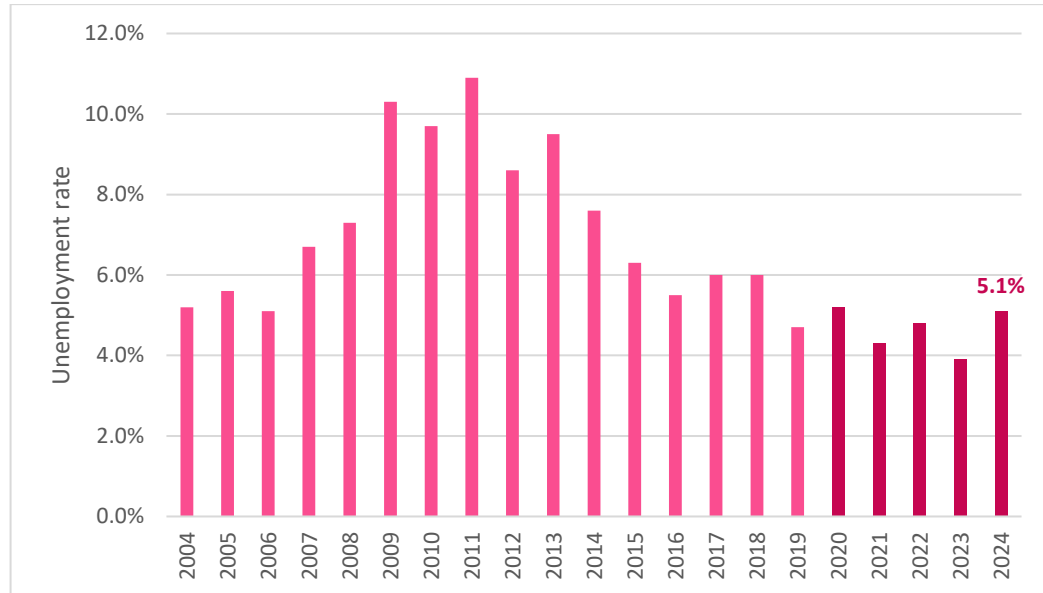
Response of the resident labour force

- 3.19 The original ENA noted how the resident labour force had '*responded positively*' to what then appeared an '*improving economic context*', with the unemployment rate of 4.7% in 2019 lower than had been recorded at any point since at least 2004⁴⁹.
- 3.20 It has fallen as low as 3.9% in two of the five additional years now reported, to 2024, and although higher rates have been recorded in the others – including

⁴⁹ *Ibid*, Figure 4.10 and paragraph 11.3

this latest year – even these are relatively low when set in the context of the last two decades⁵⁰.

Figure 3.14: Unemployment Rate in Stoke-on-Trent (2004-24)



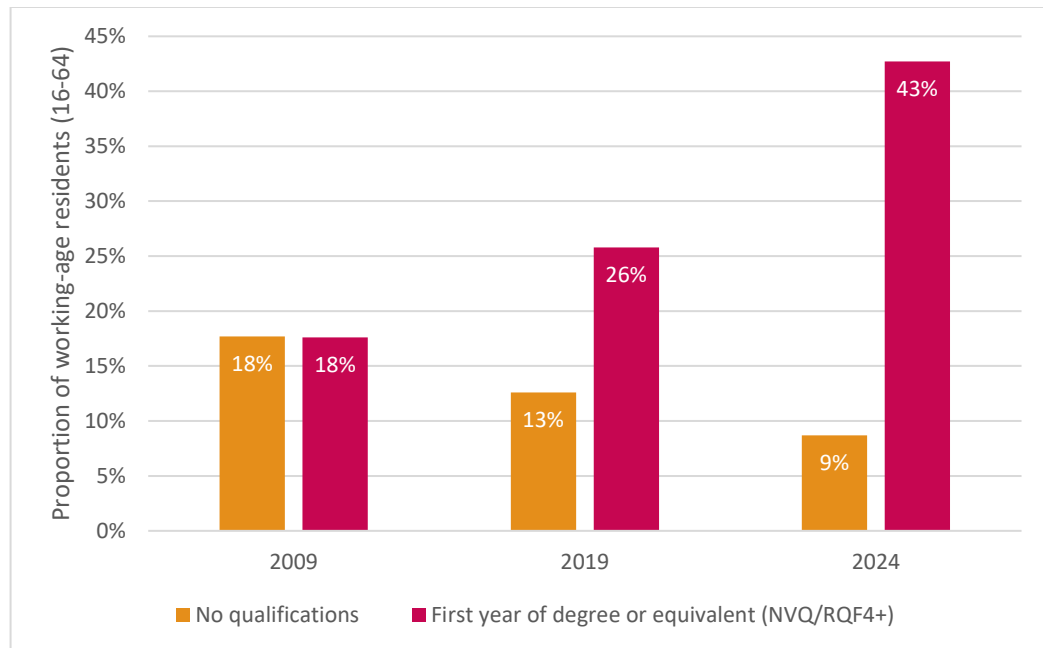
Source: ONS

- 3.21 There has also been further growth in the proportion of working-age residents holding qualifications equivalent to at least the first year of a bachelor's degree⁵¹. While there were only as many as had no qualification as recently as 2009, the two groups have clearly diverged in the years since, with working-age residents now almost five times as likely to have such qualifications as to have none at all.

⁵⁰ ONS (2025) Model-based estimates of unemployment

⁵¹ NVQ/RFQ Level 4 or above, as reported by the Annual Population Survey

Figure 3.15: Qualifications of Working-Age Residents (2009-24)



Source: ONS

Development of new employment space

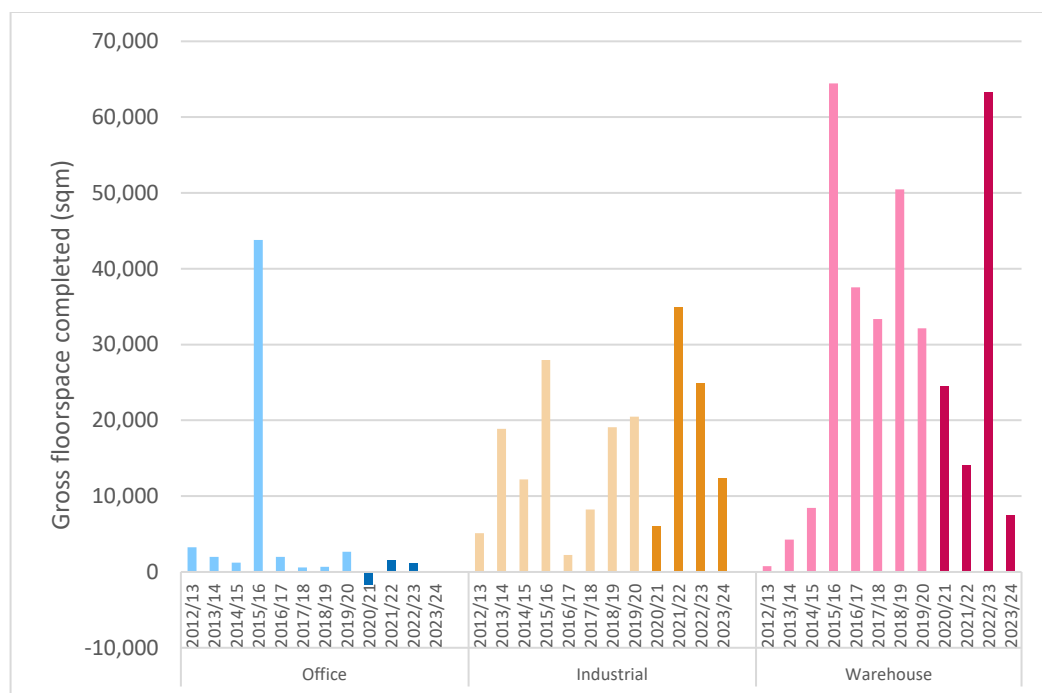
- 3.22 The Council continues to publicly report on the gross amount of employment space developed in Stoke-on-Trent, doing so up to 2024 at the time of writing⁵². This shows that a substantial amount of warehousing space was developed in 2022/23 – one of the four additional years reported since the HENAU was completed, all shown in darker colours at Figure 3.16⁵³ – but the rate at which such space has been developed does appear to have otherwise slowed. A notable amount of industrial space has also been developed, surpassing what was recorded in the years since 2012 that were previously covered. Office development has though remained limited, some way from the record set when three large schemes were completed in 2015/16⁵⁴.

⁵² Stoke-on-Trent City Council (2025) Stoke-on-Trent Planning Services: Authority Monitoring Report 2024

⁵³ Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent, Figure 7.1

⁵⁴ Paragraph 5.34 of the original ENA confirmed that this captures Smithfield in Hanley, a Bet365 development in Etruria and a smaller scheme at the Wedgwood Estate

Figure 3.16: Gross Completion of Employment Space (2012-24)

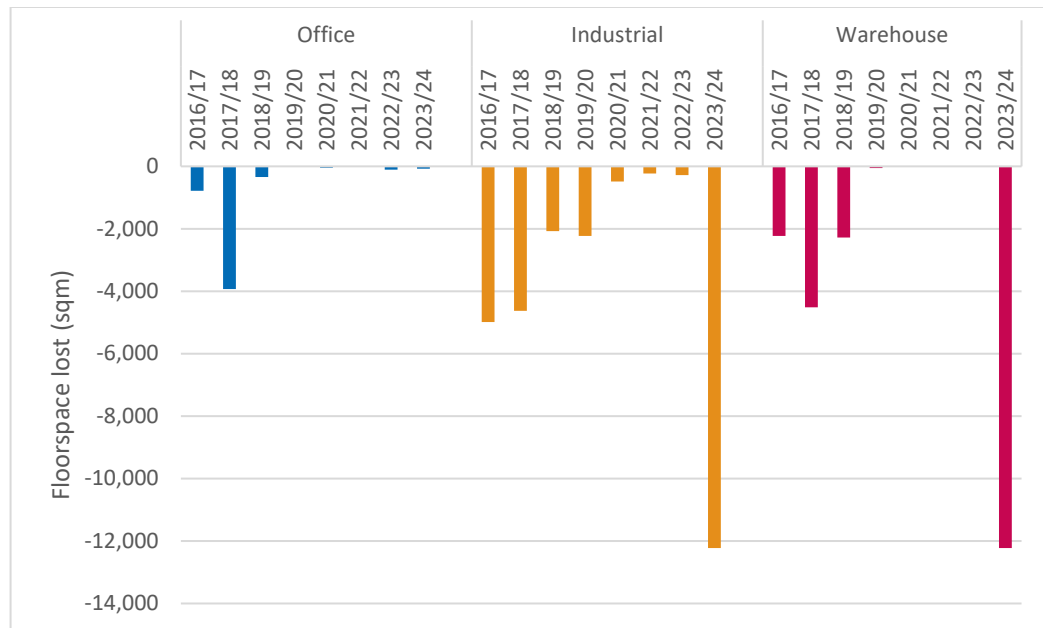


Source: Council monitoring

- 3.23 The Council has also reported since 2016 on *net* completions, from which it is possible to establish the extent of losses. These do appear to have been increasingly rare, at least prior to the last reported year in which circa 24,500sqm of predominantly warehousing and industrial space is reported to have been lost. The Council has attributed this to '*a number of change of uses*' rather than a single loss, explaining how there have been several schemes incorporating the '*selective demolition and reconfiguration*' of industrial and warehousing units⁵⁵.

⁵⁵ Stoke-on-Trent City Council (2025) Stoke-on-Trent Planning Services: Authority Monitoring Report 2024, paragraph 3.1.4

Figure 3.17: Employment Space Lost in Stoke-on-Trent (2016-24)

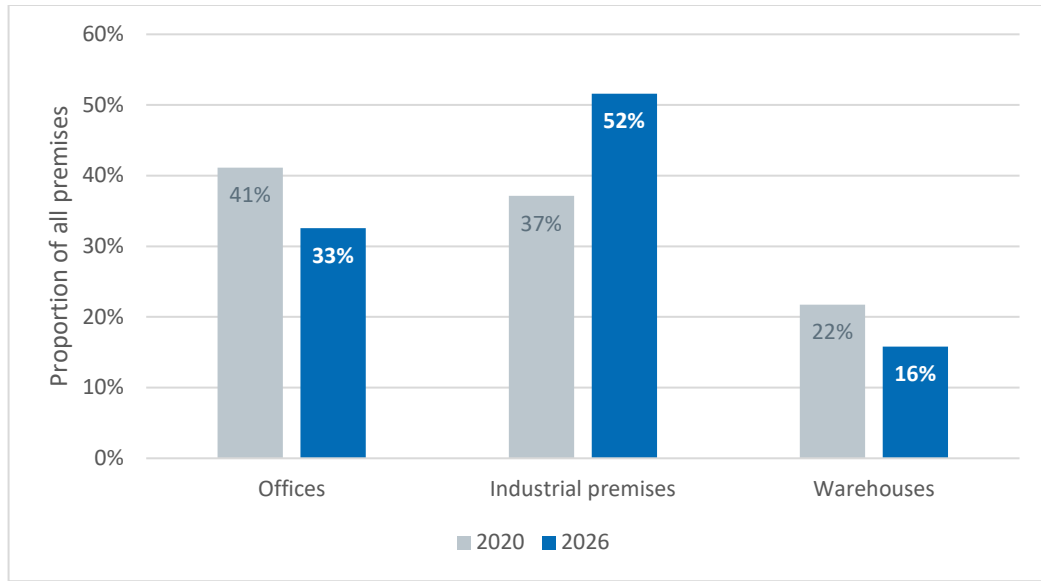


Source: Council monitoring

- 3.24 Recent development and losses have left Stoke-on-Trent with a stock of employment premises that is now oriented towards industrial premises, rather than offices as was the case when the original ENA was produced⁵⁶. Such properties now account for 52% of the premises recorded by CoStar, up from 37% in 2020, whereas the equivalent figure for offices has fallen from 41% to 33%.

⁵⁶ Turley (June 2020) Economic Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, Figure 5.1

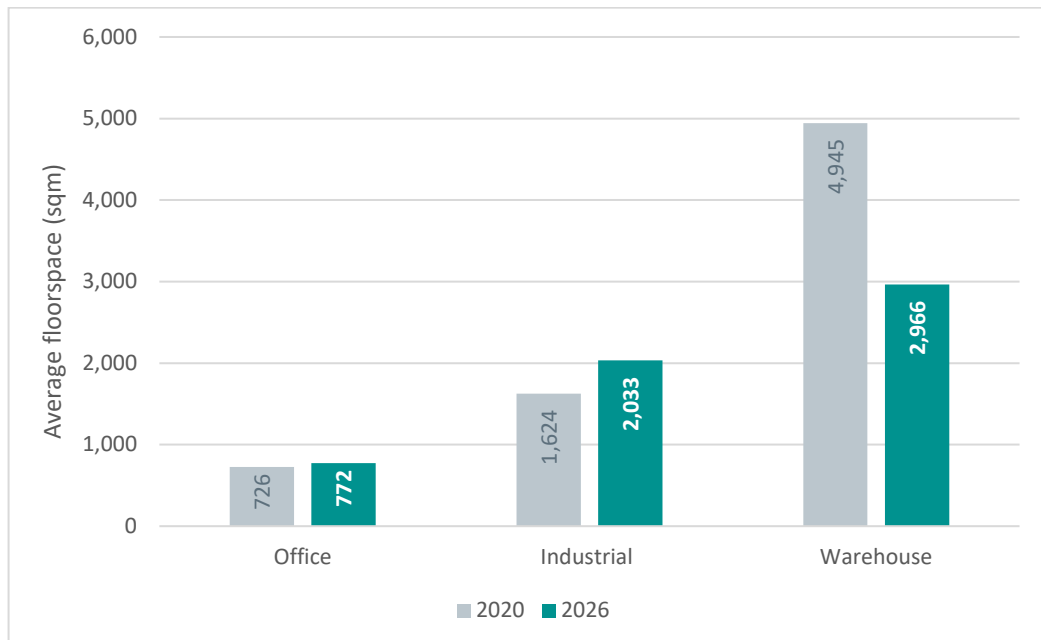
Figure 3.18: Employment Premises by Type (2020-26)



Source: CoStar; Turley analysis

- 3.25 The average industrial space in Stoke-on-Trent, and to a much lesser extent the average office, now tends to be larger than was reported in the original ENA⁵⁷. The average size of warehouses has contrastingly reduced by around 40%.

Figure 3.19: Average Size of Employment Premises (2020-26)



Source: CoStar; Turley analysis

⁵⁷ *Ibid*, Figure 5.2

- 3.26 Development has also eroded the supply of employment land that the original ENA reported as having been comprised of some 73 sites as of April 2020, offering 228.7ha of land in total, albeit the HENAU did subsequently explain how the Council had revised this down by around 10% to circa 206.4ha. It now considers itself to have a supply of only around **122.4ha**, across 35 sites, largely formed of vacant land within existing employment areas that is not in active use⁵⁸. This does count several of the sites that were included in the Regulation 18 draft of the new Local Plan, which the Council view as being able to make a reasonable contribution to future supply subject to consultation feedback. It also includes sites with extant planning permission, technically as of April 2025, albeit the Council has also sought to account for the latest information at the time of assessment in early 2026.

Table 3.2: Supply of Employment Land (April 2025)

	Number of sites	Developable area (ha)
Vacant land	19	89.4
Other / call for sites	14	28.1
Extant planning permission	2	4.8
Total	35	122.4

Source: Council monitoring

- 3.27 Table 3.3 overleaf shows that Aspinall Verdi consider over half of these sites to be suited to industrial or warehousing use, as is therefore much of the land⁵⁹.

⁵⁸ It should be noted that additional land could become available for development on such sites, if uses are temporary or otherwise cease

⁵⁹ This is intended to be only indicative and should not be taken to suggest that other uses would be inappropriate or precluded

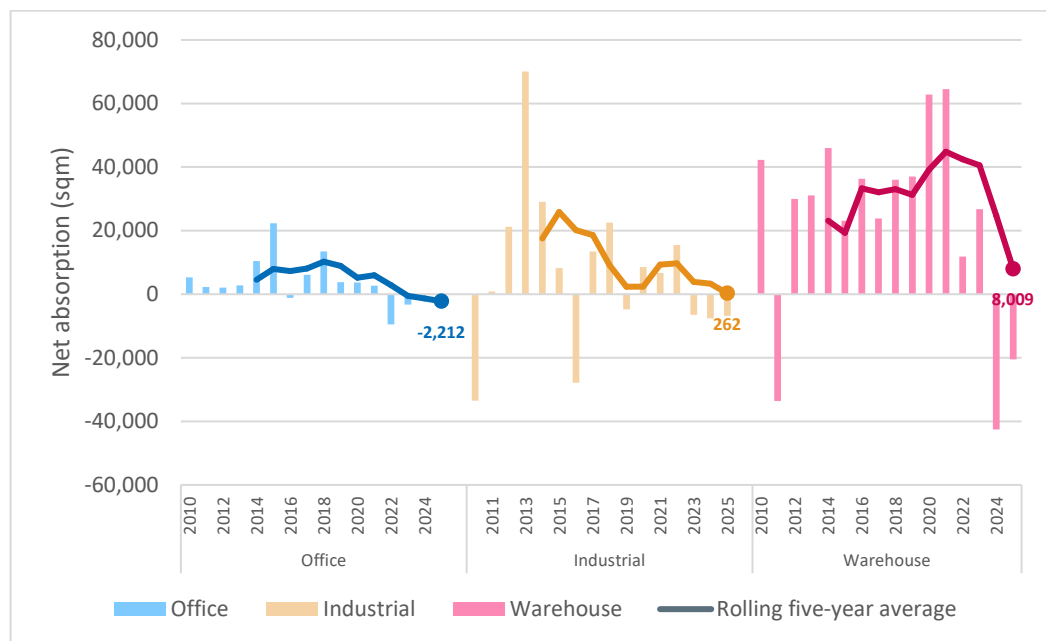
Table 3.3: Suitability of Existing Sites

	Number of sites	Developable area (ha)
Industrial and warehousing	21	106.3
Mixed use or other	4	7.7
R&D or light industrial	5	5.2
Offices	5	3.2
Total	35	122.4

Source: Aspinall Verdi

Activity in the commercial property market

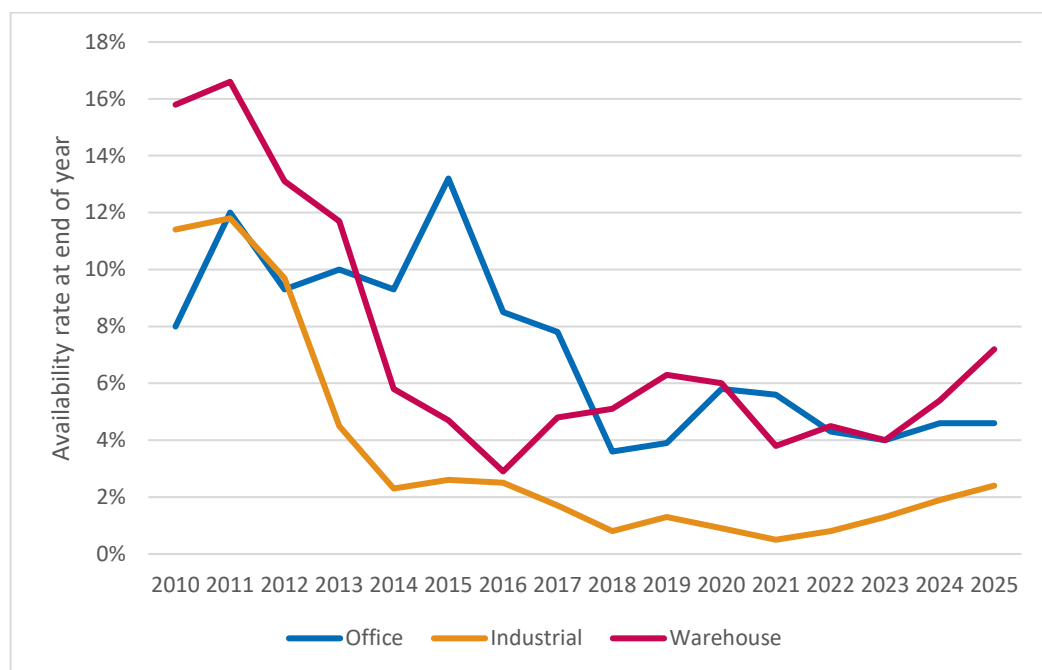
- 3.28 Offices, industrial premises and warehouses in Stoke-on-Trent have continued to be generally occupied at a faster rate than they have been vacated, but the scale of this net additional demand – termed net absorption by CoStar – has clearly reduced in recent years. The past five years have seen more office space vacated than occupied, while there has been a broad balance for industrial premises that have only recently been in greater demand. Although there has continued to be a greater amount of additional demand for warehouses, this has evidently fallen since the peak of 2020/21, with the past two years notably seeing more move-outs than move-ins.

Figure 3.20: Net Additional Demand for Commercial Premises (2010-25)

Source: CoStar

- 3.29 Such trends will though have been influenced, to at least some extent, by the amount of space available. While CoStar reports that availability was generally higher in the first part of the period shown above⁶⁰ – albeit only initially in the case of industrial premises and warehouses – it has more recently been much lower, even if there does appear to have been a modest recovery for warehouses. Availability has been a particular issue for industrial space, with as little as 0.5% being available at the end of 2021 compared to circa 11.8% a decade prior.

Figure 3.21: Availability of Premises in Stoke-on-Trent (2010-25)



Source: CoStar

Summary

- 3.30 There has been a continued evolution of the population, housing market, economy and commercial property market in Stoke-on-Trent since they were last profiled in 2020.
- 3.31 The rate of new housing delivery has slowed, with fewer homes completed annually over the last five reported years (2020-25) – circa 471 per annum – than in any such period for around a decade. Around 542 homes have been completed annually, on average, since 2000.
- 3.32 The housing stock continues to be particularly characterised by its offer of terraced and semi-detached houses, compared to the West Midlands and

⁶⁰ CoStar classes space as “available” when it is being marketed for lease or sale, regardless of whether it is vacant, occupied, available for sublease or available at a future date

country as a whole. Homes most often contain three bedrooms but are also more likely to have two than is seen regionally or nationally, whereas relatively few have four or more.

- 3.33 The 2021 Census found the population of Stoke-on-Trent to have grown more rapidly than the ONS previously estimated, and growth appears to have accelerated in the three years reported since. This recent growth is reported to have been largely driven by net international migration, since deaths have become more balanced with births, although there has also been a slightly smaller net outflow to other parts of the UK. These trends have reversed a brief decline in the population aged 25 to 39, as well as children, countering the steadier growth of the older population – aged 65 and above – who are no longer accounting for a growing share of all residents.
- 3.34 House prices have risen by around 21% over the last five reported years to 2024, but by almost a quarter at higher levels of the market which are dominated by detached – and to a lesser extent semi-detached – properties. Rents have also risen, initially in 2021 but also consistently over the last three years.
- 3.35 Stoke-on-Trent has created fewer jobs than previously over the last six reported years, to 2024, although this is largely due to two initial years of job losses with an average of 1,643 jobs having been created annually since 2020, surpassing the longer-term average of 1,110 jobs per annum back to 2009. The human health and social work sector has created the most jobs over this longer-term period, and indeed it has been outperformed only by transportation and storage since 2018. Manufacturing and the wholesale and retail sector are reported to have seen job losses over this recent period, but they do still rank amongst the three largest sectors, behind only health and social work. Unemployment remains relatively low and a growing proportion of residents are qualified to the equivalent of at least the first year of a bachelor's degree, with fewer having no qualifications at all.
- 3.36 The Council's monitoring suggests that it has been mainly warehouses and industrial premises that have been developed in Stoke-on-Trent over recent years, and although some such spaces have also been lost – particularly in the last reported year (2023/24) – this otherwise appears to be increasingly uncommon. Industrial premises account for a growing share of the inventory reported by CoStar and appear to be increasingly large, but warehouses are contrastingly implied to have become smaller than reported in 2020. Demand for both, as well as offices, appears to have eased over recent years in which more space has often been vacated than occupied, albeit this will have been at least partly influenced by availability which has been particularly limited in industrial premises.
- 3.37 The previously reported supply of employment land in Stoke-on-Trent has further eroded, with the Council now reporting there to have been only 35 sites

as of April 2025, offering around 122.4ha in total. These are predominantly vacant sites within existing employment areas but several of the sites included in the Regulation 18 draft of the new Local Plan have also been included, as have two sites with extant planning permission.

4. Future Employment Growth

- 4.1 As a baseline position, the original ENA envisaged around 559 jobs being created annually in Stoke-on-Trent over the period from 2020 to 2037, with the HENAU later confirming that this would represent an average of around 570 jobs per annum over the slightly longer period to 2040⁶¹.
- 4.2 While reflective of a baseline forecast from Experian – favoured, following interrogation, over others from Oxford Economics and Cambridge Econometrics – this is acknowledged to now be increasingly dated, having been produced in March 2020. This section therefore introduces and scrutinises newer forecasts from the same organisations, with a view to understanding the level of job growth that can be reasonably expected in Stoke-on-Trent over the periods both to 2040 and to 2045.

Introducing the latest available baseline forecasts

- 4.3 At the time of analysis, the most recent quarterly forecast produced by Experian – comparable to those presented in both the original ENA and subsequently the HENAU⁶² – was released in October 2025. Oxford Economics' latest forecast, updated monthly, was produced in January 2026. Cambridge Econometrics update their own forecasts less regularly, only once per year, with their latest being dated April 2025.
- 4.4 All three envisage jobs being created in Stoke-on-Trent – notable where Oxford Economics previously forecast losses⁶³ – but the scale of job creation that is anticipated does vary. Experian remain the most positive, forecasting an average of 945 jobs per annum between 2020 and 2040 – falling slightly to 912 per annum over the longer period to 2045 – but Oxford Economics are now almost as optimistic, respectively forecasting 906 and 798 jobs per annum over the same periods, with the marked improvement in its outlook understood to be linked to underlying assumptions about the population⁶⁴. Cambridge

⁶¹ Turley (June 2020) Economic Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, Table 8.1; Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent, paragraph 5.12

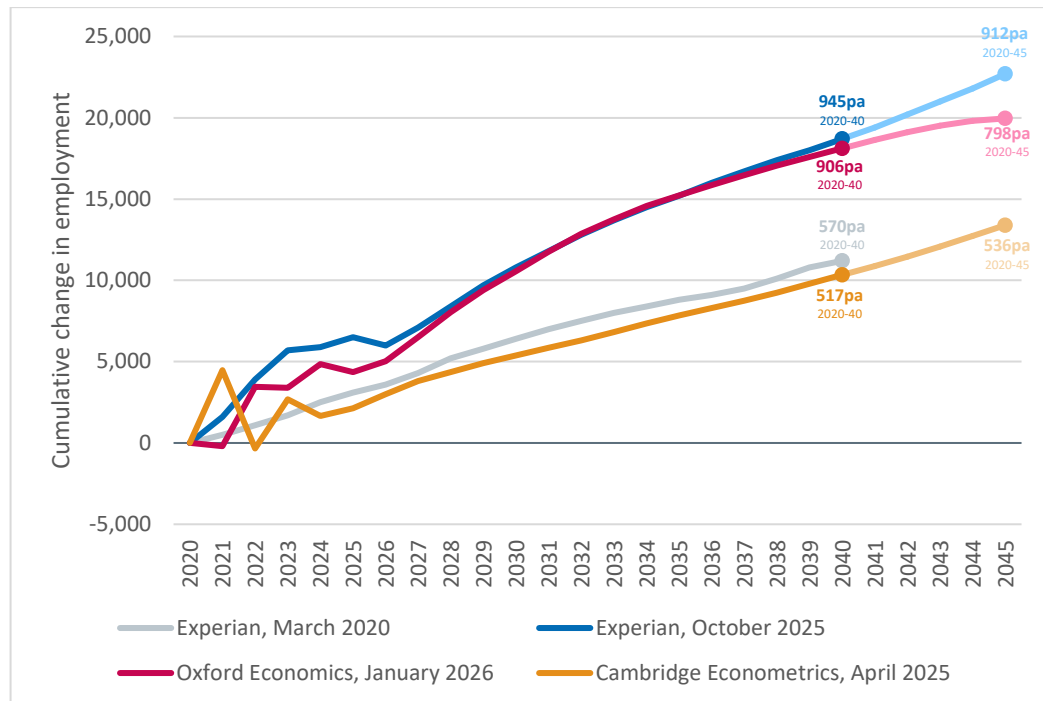
⁶² Turley (June 2020) Economic Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, Table 8.1; Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent, Table 5.1

⁶³ Turley (June 2020) Economic Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, Table 8.1

⁶⁴ Email correspondence in February 2026 has confirmed that Oxford Economics' forecast takes account of upward revisions to population estimates, to 2021, as well as the aforementioned strong growth to 2024. It assumes that the population will continue to rise but at a more modest rate, having previously assumed decline in the forecast presented in the original ENA

Econometrics envisage fewer jobs being created, at an average rate of 517 jobs per annum to 2040 and 536 to 2045.

Figure 4.1: Comparing Recent Forecasts to the Previous Baseline

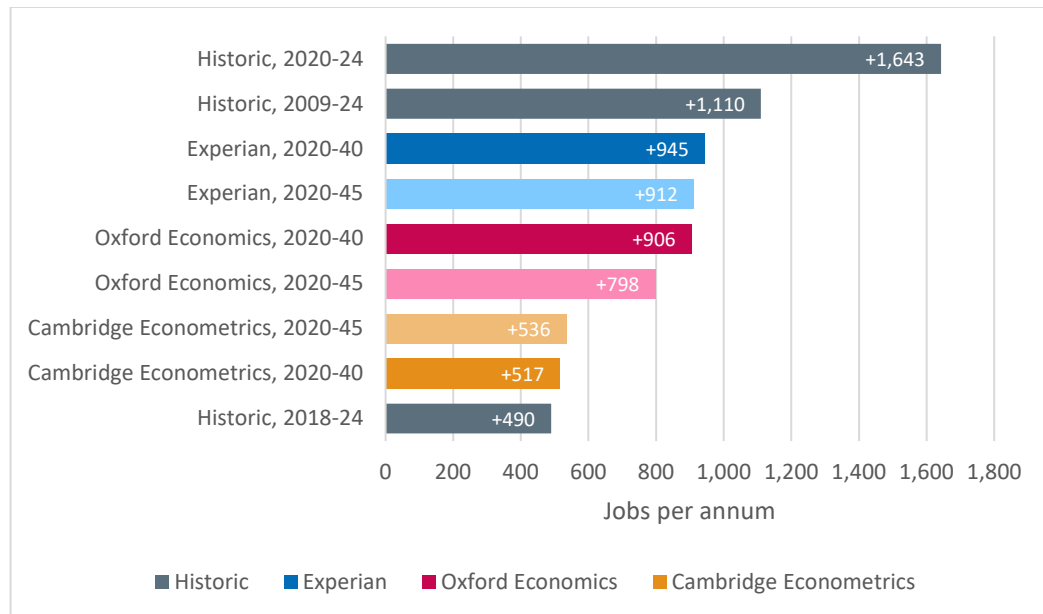


Source: Experian; Cambridge Econometrics; Oxford Economics

Benchmarking forecast growth

- 4.5 None of the latest forecasts would sustain the rate of job growth that has been seen in Stoke-on-Trent over the long-term period back to 2009, with the earlier Figure 3.11 presenting BRES data which indicates that an average of 1,110 jobs have been created annually in this time. They would each improve upon the shorter-term trend since 2018 but fall even further short of the stronger job growth seen in all but the initial two years of this period.

Figure 4.2: Comparing Forecast Job Growth to Historic Trends



Source: Experian; Cambridge Econometrics; Oxford Economics; BRES

- 4.6 This alone arguably justifies use of what is an increasingly optimistic Experian forecast, to minimise the extent of any implied slowdown in the long-term rate of job creation where the NPPF expects ‘*sustainable economic growth*’ to be ‘*positively and proactively*’ encouraged⁶⁵. That a second forecasting house – in Oxford Economics – anticipates a comparable level of growth adds to the case for such an approach, even if the pronounced swing in its own outlook since the original ENA was produced should arguably limit the weight that is given to a forecast which appears very sensitive to input assumptions around population. Cambridge Econometrics’ forecast is clearly an outlier, and there is little to suggest that it should now be favoured – having not been previously – when two others are considerably more optimistic.

A more optimistic growth scenario

- 4.7 While the original ENA did favour a baseline forecast that would have likewise slowed the long-term trend across the broader study area that it focused on – having aimed to establish a reasonable level of job growth for Stoke-on-Trent and Newcastle-under-Lyme collectively – it did also present a more optimistic scenario, which used past trends as a basis for positively adjusting even the most optimistic of the forecasts⁶⁶. Circa 864 jobs per annum would have been

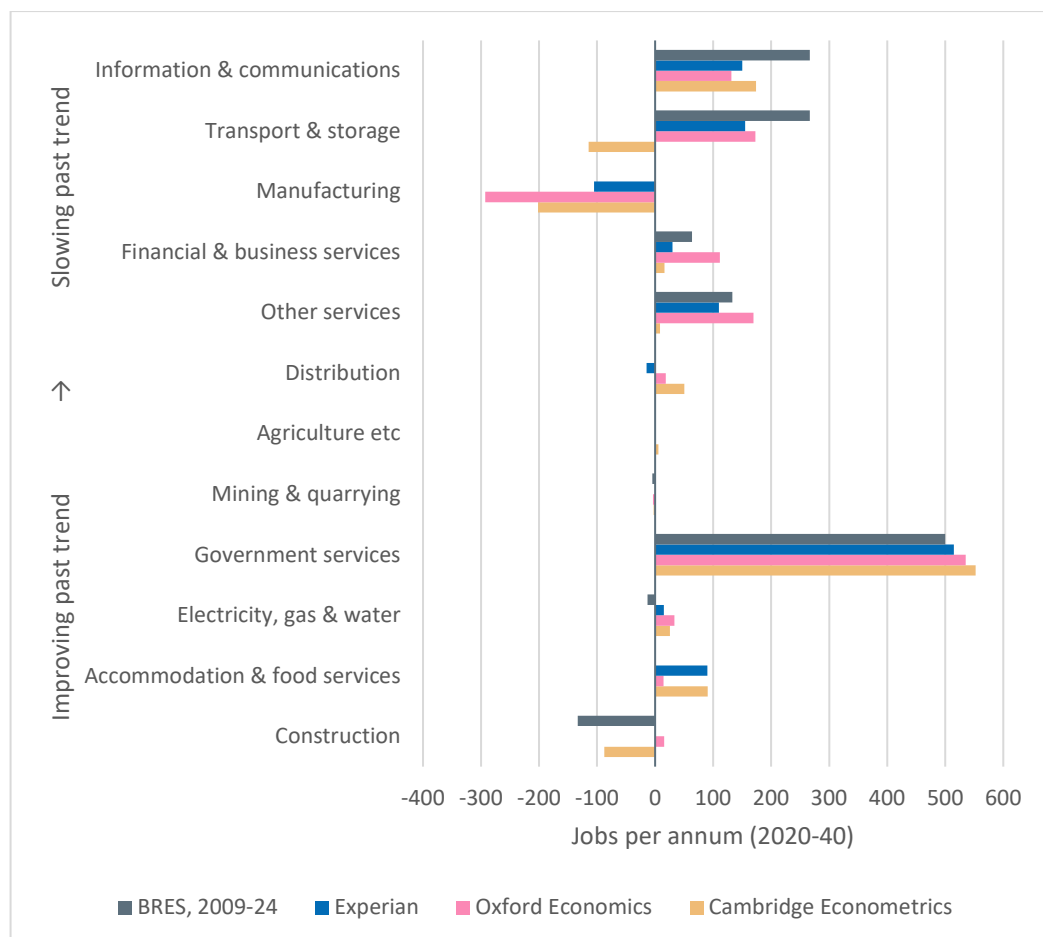
⁶⁵ MHCLG (December 2024) National Planning Policy Framework, paragraph 86a

⁶⁶ Turley (June 2020) Economic Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, paragraphs 8.26 – 8.34

created in Stoke-on-Trent in this '*higher job growth*' scenario, over the period from 2020 to 2040⁶⁷.

- 4.8 While this particular scenario is now outdated, there appear grounds to take a similar approach once again, since there are instances where even the Experian forecast assumes that certain sectors will create fewer jobs – over the period to 2040 – than in the past. It envisages the creation of only 150 jobs per annum in the information and communications sector, for example, with this being broadly consistent with the other forecasts but some 44% below what has actually been achieved each year on average since 2009. The same applies in the case of transport and storage, with Experian being almost as optimistic as Oxford Economics but envisaging the creation of around 42% fewer jobs than have been created historically. Experian's outlook for manufacturing is more positive than that of the other forecasts, but it is still a departure from the long-term trend that has brought stability in the overall number of jobs in the sector.

Figure 4.3: Comparing Forecasts to Historic Trend (2009-24)



Source: Experian; Cambridge Econometrics; Oxford Economics; BRES

⁶⁷ Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent, paragraph 5.19

- 4.9 Each of the aforementioned three sectors are notably named in the Economic Development Strategy (EDS) that the Council has produced for the period from 2024 to 2028⁶⁸. Advanced manufacturing – while only a subset of the wider manufacturing sector – is the first of three ‘*key economic sectors*’ that it identifies, with the EDS describing Stoke-on-Trent as being ‘*at the heart of the UK’s largest advanced manufacturing cluster*’ which is ‘*particularly strong in ceramics, materials and metals*’⁶⁹. The ‘*digital and technological sector*’ – believed to be the closest match to information and communications – is another reported to be ‘*growing rapidly, with significant clusters in gaming and cyber security*’⁷⁰. Although ‘*creative industries*’ is the last of the ‘*key economic sectors*’ identified by the EDS, it elsewhere describes the ‘*transport and logistics cluster*’ as ‘*one of the most important elements of the city’s economy, rivalling those found in larger cities*’⁷¹.
- 4.10 If these and the other sectors forecast to create increasingly few jobs were assumed to instead sustain their longstanding economic performance, the outcome could be that as many as 1,350 jobs could be created annually over the period to 2040, with an average of 1,334 created over the longer-term period to 2045. This could be viewed as a more optimistic growth scenario that supplements the baseline – like its counterpart in the original ENA – and acknowledges the proven potential for Stoke-on-Trent to create more jobs than are otherwise forecast by Experian.

⁶⁸ Stoke-on-Trent City Council (December 2024) Economic Development Strategy 2024-28

⁶⁹ *Ibid*, p4

⁷⁰ *Ibid*, p4

⁷¹ *Ibid*, p33

Table 4.1: Impact of Sustaining Past Trend in Specific Sectors

	Baseline, 2020- <u>40</u>	Growth, 2020- <u>40</u>	Baseline, 2020- <u>45</u>	Growth, 2020- <u>45</u>
Government services	+515	+515	+496	+500
Information & comms	+150	+267	+140	+267
Transport & storage	+155	+267	+144	+267
Other services	+110	+133	+96	+133
Accommodation & food	+90	+90	+80	+80
Financial & business	+30	+63	+44	+63
Electricity, gas & water	+15	+15	+16	+16
Construction	0	0	+8	+8
Mining & quarrying	0	0	0	0
Agriculture etc	0	0	0	0
Distribution	-15	0	-16	0
Manufacturing	-105	0	-96	0
All sectors	+945	+1,350	+912	+1,334

Source: Experian; BRES; Turley analysis

Summary

- 4.11 The original ENA favoured a baseline Experian forecast that would have seen an average of around 570 jobs created annually in Stoke-on-Trent between 2020 and 2040. This is though now dated, having been produced in March 2020, and it is apparent that more up-to-date forecasts are considerably more positive. The latest forecast from Experian – released in October 2025 – envisages some 945 jobs being created annually over the same period, and Oxford Economics are also now forecasting the creation of circa 906 jobs per annum having previously envisaged job losses. Cambridge Econometrics anticipate only 517 jobs being created over this timeframe, rising to 536 per annum over the longer-term period to 2045 (whereas the others fall to 912 and 798 jobs per annum respectively).
- 4.12 Each forecast would slow the rate of job growth seen in Stoke-on-Trent both over the long-term, back to 2009, and more recently since 2020. It is arguably justified to favour the most optimistic forecast from Experian for this reason alone, to minimise the extent of any slowdown in the context of an NPPF that promotes economic growth. The sensitivity of Oxford Economics' forecast,

which previously predicted job losses, and the outlying nature of Cambridge Econometrics' are considered to strengthen the case for such an approach.

- 4.13 There do though remain grounds for developing a more optimistic growth scenario, like the original ENA which adjusted even the most optimistic baseline forecast to better reflect past trends. There remain several sectors that are forecast to create fewer jobs than in the past, including some that the Council views as '*key*' or '*important*' such as information and communications; manufacturing; and transport and storage. If such sectors instead sustain their past performance, back to 2009, then around 1,350 jobs could conceivably be created annually over the period to 2040, or 1,334 jobs per annum to 2045. This could be viewed as a more optimistic growth scenario that supplements the baseline, like its counterpart in the original ENA.

5. Future Need for Housing

- 5.1 The HENAU referred to the outcome of what was then the standard method of assessing housing need, confirming that a minimum of 679 dwellings per annum were needed in Stoke-on-Trent at that point⁷².
- 5.2 The standard method has though evolved in the intervening period, as noted in the introduction to this report. This section therefore explains the changes and confirms the new outcome for Stoke-on-Trent. It then proceeds – like the HENAU – to consider how such a level of provision could grow the population and particularly the labour force, to understand whether likely job growth can be expected to generate a greater need for housing.

Evolution of national policy

- 5.3 Shortly after its election in July 2024, the Government expressed an intention to ‘reform’ the NPPF in order to ‘kickstart economic growth’ and deliver the infrastructure that the country needs, including ‘one and a half million homes over the next five years’⁷³. It consulted on proposed reforms over eight weeks from 30 July⁷⁴.
- 5.4 A new standard method of assessing housing need featured amongst the proposed changes. This was intended to replace the method that was first introduced in July 2018 and later amended in December 2020, which used 2014-based household projections as a baseline and then adjusted for affordability before capping the outcome and applying a final 35% uplift in the twenty largest cities and urban centres.
- 5.5 In proposing to replace this method, the Government acknowledged that:

“The use of household projections in the current standard method has attracted criticism from across the sector. Household projections are volatile, and subject to change every few years, making it difficult for local planning authorities to plan for housing over their plan periods (10-15 years). To guard against regular shifts, the previous government opted to lock in 2014-projections. This means the dataset is now ten years old and is no longer fit for purpose in reflecting current housing needs. By projecting forward past trends, household projections have also resulted in artificially low projections in some places, particularly where overcrowding and concealed households have suppressed household

⁷² Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent, Table 4.1

⁷³ Speech by the Chancellor, The Rt Hon Rachel Reeves MP, on 8 July 2024

⁷⁴ MHCLG (August 2024) Proposed reforms to the National Planning Policy Framework and other changes to the planning system

formation, which generally happens in the least affordable parts of the country”⁷⁵

- 5.6 In response to these issues, the Government proposed a new method that was more aligned with its aspirations for the housing market. This was to be based on each area’s existing housing stock, rather than household projections, with this change:

“...designed to provide a stable baseline that drives a level of delivery proportionate to the existing size of settlements, rebalancing the national distribution to better reflect the growth ambitions across the Midlands and North”⁷⁶

- 5.7 The baseline of the standard method was proposed to be – and ultimately was – set at 0.8% of the existing housing stock, so as to approach the average seen nationally over the prior decade (0.89%) and thus ‘*bank the average status quo level of delivery*’⁷⁷.

- 5.8 As in the original method this was still to be adjusted based on affordability, with the Government acknowledging that:

“High and rapidly increasing house prices indicate an imbalance between the supply of and demand for new homes, making homes less affordable. The worsening affordability of homes is the best evidence that supply is failing to keep up with demand”⁷⁸

- 5.9 The Government proposed to retain use of affordability ratios produced by the ONS, which compare median house prices with the equivalent earnings of those working in an area. It planned to keep applying uplifts in areas where house prices equated to more than four years’ earnings, but proposed to more than double the weighting of this adjustment and also base it on an average of the last three published ratios rather than simply the latest one.

- 5.10 This part of the proposed method was ultimately changed following the eight-week consultation, to make it ‘*more responsive to affordability pressures*’⁷⁹. The Government opted to raise the threshold beyond which an adjustment is made, from four to five years, arguing that the former is ‘*now less appropriate*’ given changes in the housing market and access to mortgages⁸⁰. It acknowledged that this change would generally reduce the size of adjustments and responded by

⁷⁵ *Ibid*

⁷⁶ *Ibid*

⁷⁷ *Ibid*

⁷⁸ *Ibid*

⁷⁹ MHCLG (December 2024) Government response to the proposed reforms to the National Planning Policy Framework and other changes to the planning system consultation

⁸⁰ *Ibid*

further increasing their weight, so as to ensure that housing need nationally remains at a level that it deems *'appropriate'*⁸¹. These changes served to reduce housing need in more affordable areas, compared to the original proposals, while increasing it in *'areas where affordability issues are most acute'*⁸².

- 5.11 A final change extended the period over which affordability ratios would be averaged, from three to five years. This aimed to both reflect slightly longer-term trends and *'smooth out outlying changes to affordability over time'*, making the outcome of the method more stable⁸³.
- 5.12 Having made these changes, the Government formally introduced the new standard method by revising the PPG on 12 December 2024⁸⁴. Amongst other things, this confirmed that *'the standard method should be used to assess housing needs'*, producing *'a minimum annual housing need figure'* which ensures that *'plan-making is informed by an unconstrained assessment of the number of homes needed in an area'*⁸⁵.
- 5.13 The revised NPPF, published on the same day, explicitly confirms that *'a local housing need assessment, conducted using the standard method'* should *'determine the minimum number of homes needed'* and so inform strategic policies⁸⁶. Text added by the previous Government a year earlier, describing the outcome of the standard method as *'an advisory starting-point'* and suggesting that *'exceptional circumstances'* could justify *'an alternative approach to assessing housing need'*, was removed⁸⁷.
- 5.14 The revised NPPF confirmed that its policies would apply for the purposes of preparing Local Plans from 12 March 2025, excluding only those that had by that point been submitted for examination or had reached the Regulation 19 stage with a housing requirement equivalent to at least 80% of the need suggested by the new standard method⁸⁸. Plans were also exempt if they were building on an existing Local Plan, adopted in the previous five years, or were being prepared for areas already covered by Spatial Development Strategies. It is noted that none of these circumstances apply in the case of Stoke-on-Trent, meaning that the revised method should now be used to calculate the minimum number of homes needed.

⁸¹ *Ibid*

⁸² *Ibid*

⁸³ *Ibid*

⁸⁴ Housing and economic needs assessment - GOV.UK

⁸⁵ PPG Reference ID 2a-002-20241212 and 2a-003-20241212

⁸⁶ MHCLG (December 2024) National Planning Policy Framework, paragraph 62

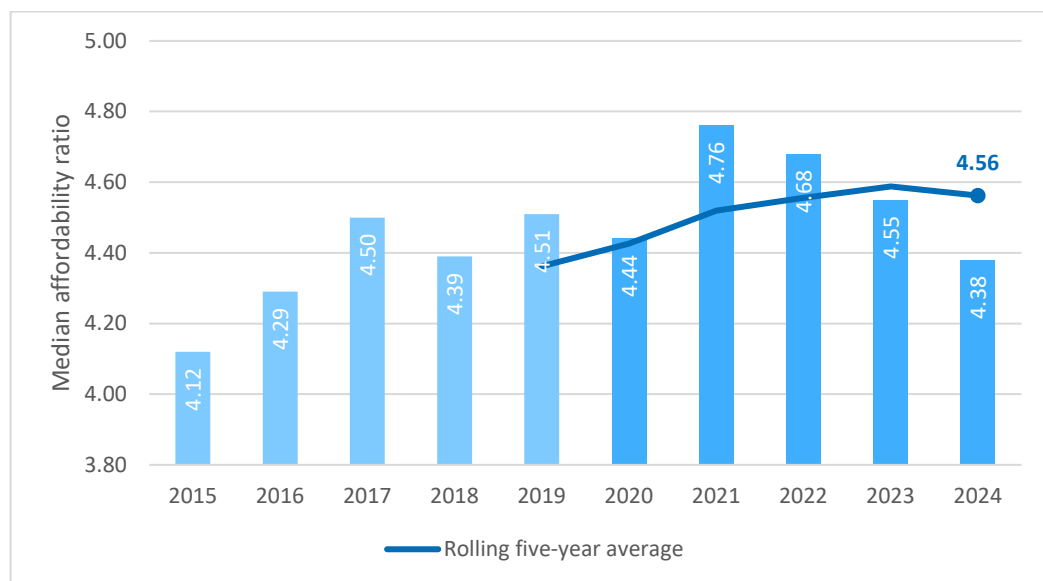
⁸⁷ Department for Levelling Up, Housing and Communities (December 2023) National Planning Policy Framework, paragraph 61

⁸⁸ MHCLG (December 2024) National Planning Policy Framework, Annex 1

Outcome of the new standard method for Stoke-on-Trent

- 5.15 The baseline of the new method, as noted above, should equate to 0.8% of the existing housing stock. The PPG confirms the specific dataset that should be drawn upon in this regard, also stating that *'the most recent data published at the time should be used'*⁸⁹.
- 5.16 The latest available data, at the time of writing in early 2026, suggests that there were 118,900 dwellings in Stoke-on-Trent as of 31 March 2024⁹⁰. Calculating 0.8% of this total produces a baseline figure of circa **951 dwellings per annum**.
- 5.17 This baseline is then adjusted based on an average of affordability ratios *'over the five most recent years for which data is available'*. As of early 2026, affordability ratios for Stoke-on-Trent are available for the period to 2024, with an average of the five most recent years equating to circa 4.56⁹¹.

Figure 5.1: Average Affordability Ratio in Stoke-on-Trent



Source: ONS

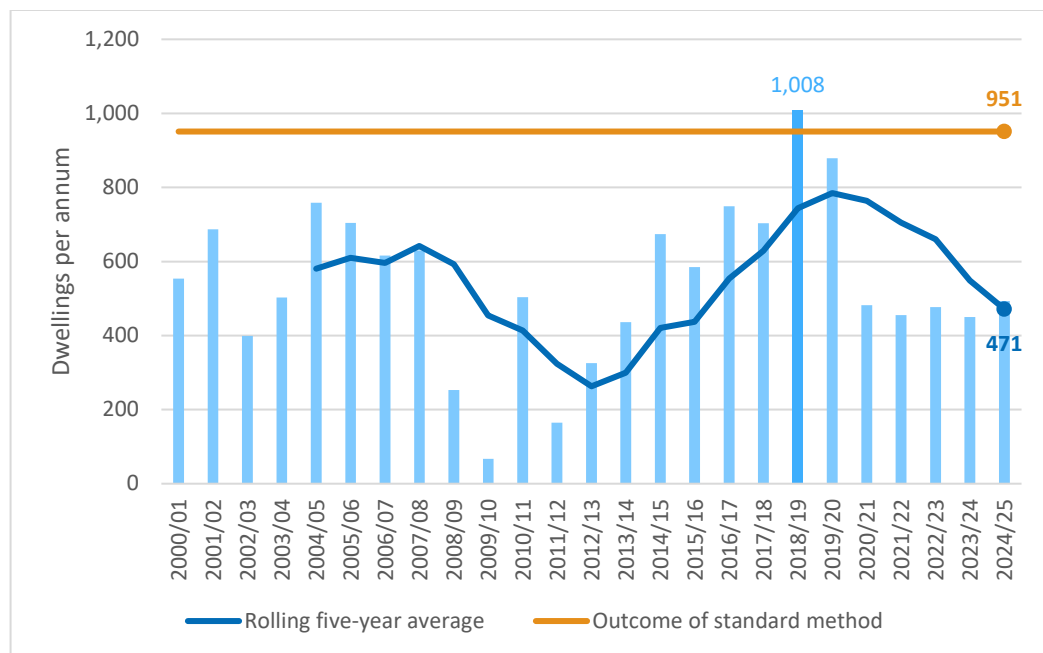
- 5.18 This average is notably below the threshold of five years, beyond which an affordability adjustment is made. The outcome of the standard method for Stoke-on-Trent is therefore simply the unadjusted baseline figure of **951 dwellings per annum**, which is itself more than have been delivered in all but one year this century and is roughly double the average number completed over the last five reported years (471dpa).

⁸⁹ PPG Reference ID 2a-004-20241212

⁹⁰ MHCLG (May 2025) Table 125: dwelling stock estimates by local authority district

⁹¹ ONS (March 2025) House price to workplace-based earnings ratio

Figure 5.2: Benchmarking Outcome of Standard Method to Past Delivery

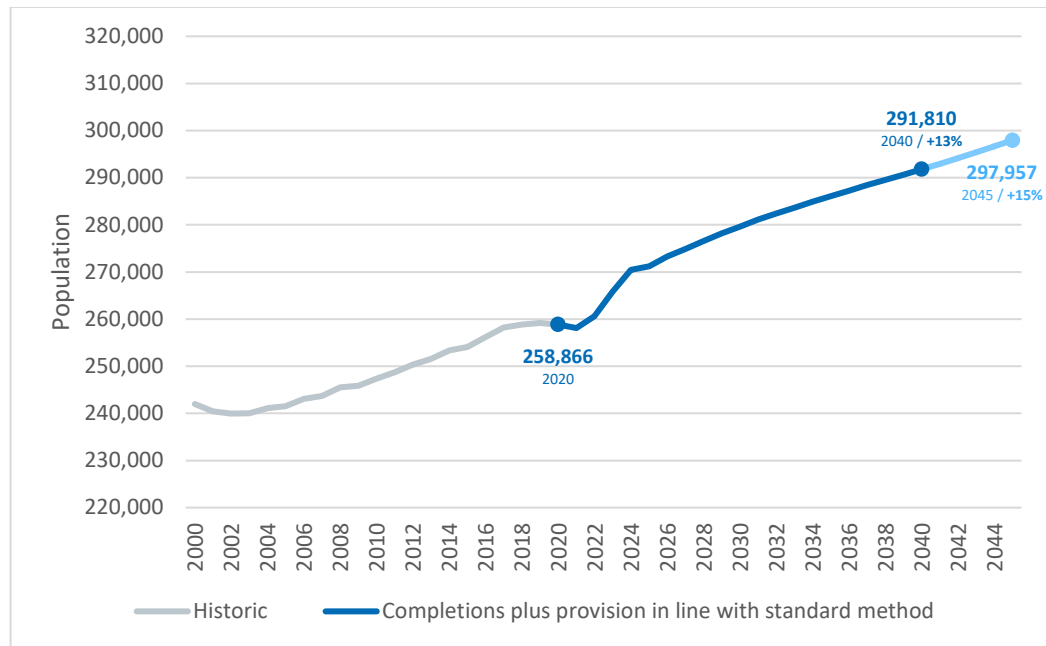


Source: Council monitoring; Turley analysis

Resulting population growth

- 5.19 There is no official indication of how the population of an area is being assumed to change within a standard method that is now fully disconnected from official demographic projections. The PPG also offers no guidance on how this can be understood.
- 5.20 Demographic modelling, of the kind previously presented in the HENAU and indeed earlier studies, can though be developed once again by Edge Analytics to overcome this issue. **Appendix 1** explains how such a model can incorporate the most appropriate demographic data and make evidence-based assumptions to robustly estimate how provision in line with the current outcome of the standard method could change the size and profile of the population in Stoke-on-Trent, when allowing also for the ageing of existing residents over the period either to 2040 or 2045. This assumes that the minimum need is met in full from 2025 onwards, reflecting the point at which the outcome of the standard method last changed and the end of the last year in which completions have been monitored by the Council. Known completions are indeed used to bridge the small gap from the latest official population estimate for 2024.
- 5.21 The modelling suggests that Stoke-on-Trent could be home to 291,810 people by 2040, if the minimum need was to be met from 2025 onwards. This would represent growth of around 13% over the period from 2020 to 2040, rising to around 15% over the longer period to 2045 by which the point 297,957 people could live in the city.

Figure 5.3: Estimated Effect on Population of Stoke-on-Trent

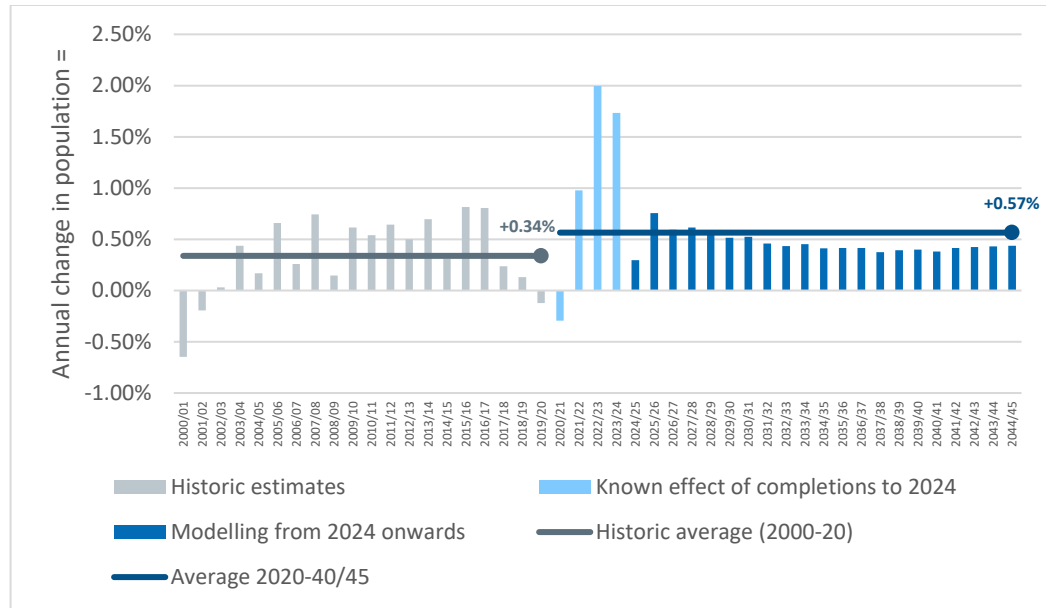


Source: ONS; Edge Analytics; Turley analysis

- 5.22 This would represent growth of circa 0.57% per annum on average, over either period. While this is roughly two thirds higher than the average annual growth of circa 0.34% seen over the two decades prior to 2020, it is clearly influenced by the strong growth that is already known to have occurred early in the plan period, averaging 1.57% per annum between 2021 and 2024⁹². The average from 2024 onwards – yet to be covered by official population estimates – would be over two thirds lower at around 0.46% per annum, confirming that it is in no way being assumed that the strong growth of the last three reported years continues.

⁹² ONS (July 2025) Estimates of the population for England and Wales

Figure 5.4: Benchmarking Modelled Population Growth



Source: ONS; Edge Analytics

- 5.23 Such growth would be expected to grow each of the age cohorts defined at the earlier Figure 3.6. While it would be the oldest residents – aged 65 and above – growing in number at the fastest rate, the working-age population (16-64) would also be expected to grow at a slightly faster rate than the population at large, consequently accounting for a growing share of the total. Children aged 15 and under would be expected to grow at the slowest rate by far.

Table 5.1: Estimated Effect on Age Profile

	15 and under	16 to 24	25 to 39	40 to 64	65 and over	All ages	16 to 64
2020	52,973	28,719	54,465	78,485	44,224	258,866	161,669
% in 2020	20%	11%	21%	30%	17%	100%	62%
2040	53,530	34,310	60,050	90,040	53,879	291,810	184,401
% change	+1%	+19%	+10%	+15%	+22%	+13%	+14%
% in 2040	18%	12%	21%	31%	18%	100%	63%
2045	54,025	33,377	61,563	94,419	54,572	297,957	189,359
% change	+2%	+16%	+13%	+20%	+23%	+15%	+17%
% in 2045	18%	11%	21%	32%	18%	100%	64%

Source: ONS; Edge Analytics

Potential to support job growth

- 5.24 The standard method has been shown to currently suggest a need for 951 dwellings per annum in Stoke-on-Trent, but the NPPF emphasises that this should be viewed as only *'the minimum number of homes needed'* and proposed revisions would make it even clearer that *'the standard method calculates a **minimum** annual local housing need figure'*⁹³ (our emphasis).
- 5.25 Planmakers are to be seemingly encouraged to set *'housing requirement figures...higher than the overall figure identified in the local housing needs assessment where appropriate'*, including in *'situations...where it reflects growth ambitions linked to economic development or infrastructure investment'*⁹⁴. This closely mirrors the wording of the existing NPPF⁹⁵.
- 5.26 Although the Government is yet to have proposed changes to the PPG, this already does expect authorities to *'consider the merits of planning for higher growth if, for example, this would seek to reflect economic aspirations'*⁹⁶.
- 5.27 Section 4 introduced a range of employment forecasts for Stoke-on-Trent, favouring as a baseline the most optimistic from Experian which envisages the creation of 945 jobs per annum between 2020 and 2040, or 912 per annum over the period to 2045.
- 5.28 The extent to which this can be supported by simply aligning with the outcome of the standard method can be understood using the demographic modelling introduced above, since this can estimate the job growth that can be supported by the population when allowing for:
- **Unemployment**, which has been assumed to remain aligned with the average recorded in Stoke-on-Trent over the last five reported years⁹⁷ (4.7%);
 - **Changing rates of economic participation**, amongst residents aged 16 to 89, with there assumed to be an evolution from the position recorded by the 2021 Census in line with the most recently published national forecast from the Office for Budget Responsibility⁹⁸ (OBR);

⁹³ MHCLG (December 2024) National Planning Policy Framework, paragraph 62; MHCLG (December 2025) National Planning Policy Framework: draft text for consultation, Annex D paragraph 2

⁹⁴ MHCLG (December 2025) National Planning Policy Framework: draft text for consultation, Policy HO2 paragraph 3

⁹⁵ MHCLG (December 2024) National Planning Policy Framework, paragraph 69

⁹⁶ PPG Reference ID 2a-040-20241212

⁹⁷ ONS (2025) Model-based estimates of unemployment

⁹⁸ Office for Budget Responsibility (September 2025) OBR Cohort model outputs, aligned with the March 2025 Economic and fiscal outlook

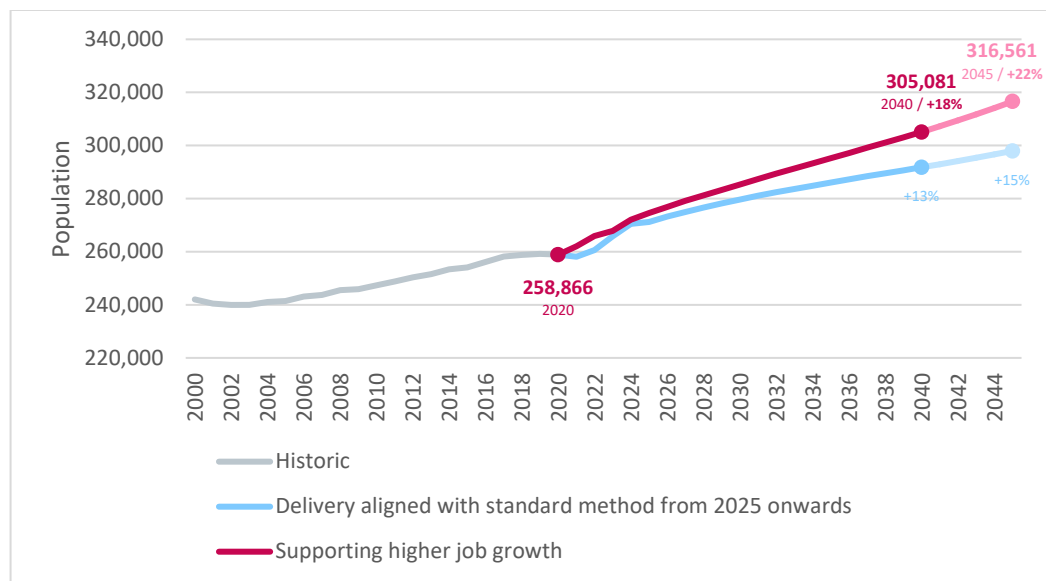
- **Commuting**, specifically the small net in-commute that was recorded by the 2021 Census when Stoke-on-Trent had 0.97 working residents for every person employed in its workplace at that point. While this is likely to have been skewed to an extent by the COVID-19 pandemic, it does closely compare to the ratio of 0.95 that was recorded by the 2011 Census, giving assurance that this is a reasonable assumption for the purposes of this exercise; and
 - **People holding more than one job**, so-called “double jobbing” assumed to continue at the average rate that the Annual Population Survey has recorded in Stoke-on-Trent over the decade to 2024⁹⁹ (2.9%).
- 5.29 The modelling suggests that the creation of 22,098 jobs could be supported in Stoke-on-Trent between 2020 and 2040, if housing delivery aligns with the outcome of the standard method from 2025 onwards, the labour force behaves in this way and jobs known to have been created to 2024 are taken into account¹⁰⁰. This equates to an average of 1,105 jobs per annum, surpassing the baseline forecast from Experian and indeed almost exactly aligning with the long-term trend back to 2009 (1,110pa). The latter would not though be sustained over the period to 2045, in which an average of 1,038 jobs would be supported annually, albeit this would continue to improve upon the baseline forecast from Experian.
- 5.30 Section 4 did also introduce a more optimistic growth scenario, which adjusts the outlook for certain sectors to better align with past performance. Some 1,350 jobs per annum would be created in this scenario between 2020 and 2040, falling slightly to 1,334 jobs per annum over the longer period to 2045. This is in each case beyond what the modelling suggests could be supported by simply meeting the minimum need implied by the standard method.
- 5.31 The scale of housing growth that would need to be planned for to support such levels of job creation can though – as in the original ENA – be estimated through further modelling, which takes an identical approach but this time starts by assuming that Stoke-on-Trent does indeed create this greater number of jobs.
- 5.32 This suggests that the population of Stoke-on-Trent would need to grow by around 18% to increase the size of the labour force and support the creation of an average of 1,350 jobs per annum between 2020 and 2040, or by 22% to 2045. This would represent growth of around 0.8% per annum on average, compared to around 0.6% when aligning with the outcome of the standard method, with both surpassing the trend over two decades prior to the current plan period¹⁰¹ (0.3%).

⁹⁹ ONS (2025) Annual Population Survey, January – December 2024

¹⁰⁰ Based on BRES data introduced at the earlier Figure 3.11

¹⁰¹ ONS (July 2025) Estimates of the population for England and Wales

Figure 5.5: Population Growth Needed to Support Higher Job Growth



Source: ONS; Edge Analytics

- 5.33 This would be expected to grow each age cohort to a greater extent than if simply the minimum need for housing was met, as shown by Table 5.2.

Table 5.2: Comparing Growth of Age Cohorts

	Meeting minimum need, 2020- <u>40</u>	Supporting higher job growth, 2020- <u>40</u>	Meeting minimum need, 2020- <u>45</u>	Supporting higher job growth, 2020- <u>45</u>
15 and under	+1%	+6%	+2%	+8%
16 to 24	+19%	+25%	+16%	+24%
25 to 39	+10%	+17%	+13%	+23%
40 to 64	+15%	+20%	+20%	+28%
65 and over	+22%	+25%	+23%	+27%
All ages	+13%	+18%	+15%	+22%
16 to 64	+14%	+20%	+17%	+25%

Source: ONS; Edge Analytics

- 5.34 When applying the same household formation rates as were applied in the earlier modelling – and described in further detail in **Appendix 1** – it is suggested that **circa 1,227 dwellings per annum** could be needed to accommodate this population growth and support the creation of 1,350 jobs

per annum over the period from 2020 to 2040. This rises slightly to **1,269 dwellings per annum** over the longer period to 2045.

- 5.35 Both surpass the minimum need for 951 dwellings per annum that is suggested by the standard method, indicating that the Council may need to consider planning for a higher level of housing provision – notably beyond what has been delivered in any single year this century – if it is to pursue this level of job growth.

Summary

- 5.36 The NPPF continues to require use of a standard method to determine the minimum number of homes needed in an area, but the method itself has evolved since the HENAU used it to report that a minimum of 679 dwellings per annum were then needed in Stoke-on-Trent.
- 5.37 While previously based on increasingly dated household projections, the standard method is now driven by the existing stock of an area with an adjustment then made in areas where house prices have typically equated to more than five years' earnings, albeit this is not the case in Stoke-on-Trent. The further uplift applied by virtue of its status as one of the country's twenty largest cities and urban centres has also now been removed.
- 5.38 Since May 2025, the new method has indicated that **a minimum of 951 dwellings per annum** are needed in Stoke-on-Trent, itself around twice the long-term rate of provision and more than have been delivered in all but one year this century.
- 5.39 Demographic modelling suggests that such a level of provision, from 2025 onwards, could cause the population to grow by around 13% over the entire period from 2020 to 2040, or by slightly more (15%) when this is extended to 2045. While this would represent a step up from the growth seen over two decades prior to 2020, it would equally not sustain the particularly strong growth that is believed to have occurred over three years since. It would be expected to grow each age group, albeit with the older population growing most in proportionate terms.
- 5.40 The NPPF continues to make clear that the outcome of the standard method should be viewed as only a minimum, allowing authorities to set higher housing requirements linked to economic growth ambitions. It is therefore of note that such a level of provision could combine with changing behaviours – and add to jobs already known to have been created – to grow the labour force and support the creation of some 1,105 jobs per annum over the period from 2020 to 2040, or 1,038 to 2045. This surpasses what is envisaged by the baseline Experian forecast introduced in the previous section (945/912 jobs per annum respectively) but would fall short of the higher growth scenario that was also developed, in which 1,350 jobs would be created annually to 2040 (or 1,334 to 2045). Further modelling suggests that **circa 1,227 dwellings per annum** could

be needed between 2020 and 2040 – or **1,269 to 2045** – if the Council was to pursue this higher level of job growth.

6. Size and Type of Housing Needed

- 6.1 With the NPPF then requiring assessment of the size and type of housing needed, both the original HNA and subsequent HENAU used data from the 2011 Census to establish households' varying tendencies to occupy different sizes of housing in Stoke-on-Trent, subsequently applying these rates to the additional households that were then projected to form¹⁰².
- 6.2 This is still a requirement of the current NPPF¹⁰³ – as well as its emerging replacement¹⁰⁴ – but equivalent data from the 2021 Census is also now available, providing an updated position on households' choices that can once again be combined with the demographic modelling introduced in this report.
- 6.3 This section therefore introduces this newly available evidence and considers its implications for the size and type of housing needed in Stoke-on-Trent.

Updated evidence on occupancy trends

- 6.4 Table 5.1 of the original HNA outlined how five different types of households occupied housing of various sizes in Stoke-on-Trent, showing for instance that people living alone tended to – though did not always – have smaller homes. Households with dependent children and unrelated adults, in house shares for example, were more likely to occupy larger properties.
- 6.5 This drew upon the findings of the 2011 Census but equivalent data from 2021 is now available, as noted above. This does offer a more limited breakdown in terms of household types, complicating attempts to directly compare with the data presented in the original HNA, but this can still be done by considering three broad types rather than the previous five.
- 6.6 Figure 6.1 overleaf shows how the size of housing occupied in Stoke-on-Trent by people living alone, households with children and all other households – including couples without children and other unrelated adults sharing a home – has changed between 2011 and 2021. It confirms that there has been no fundamental change, with the differences instead being relatively subtle. People living alone are still the most inclined to live in smaller homes but they have become slightly less likely to do so, with the proportion having at least three bedrooms slightly rising. Households with children increasingly have at least four bedrooms, although they are still most likely to have three. Other

¹⁰² Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, section 5; Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent, p26- 31

¹⁰³ MHCLG (December 2024) National Planning Policy Framework, paragraph 63

¹⁰⁴ MHCLG (December 2025) National Planning Policy Framework: draft text for consultation, Policy HO1 paragraph 2

households without children have also become more likely to live in larger homes with at least three bedrooms.

Figure 6.1: Number of Bedrooms in Homes Occupied by Different Households in Stoke-on-Trent (2011-21)

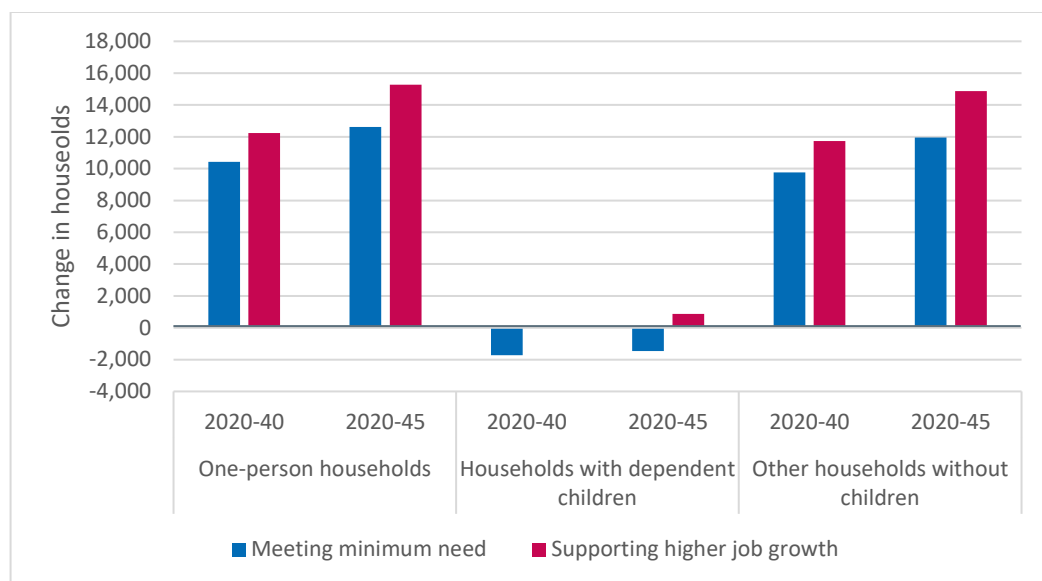


Source: Census 2011; Census 2021

Implications for the size of housing needed

- 6.7 The tendencies summarised above can be applied to the projections introduced in the previous section, which suggest that there will be growth in the number of households without children – including those living alone – regardless of whether only the minimum need for housing is met or more homes are instead provided to support a higher level of job growth. Only in the latter scenario, however, and indeed only over the period to 2045, would there be growth in the number of households with dependent children, since this group would be expected to contract if only the minimum need was met.

Figure 6.2: Projected Change by Household Type



Source: Edge Analytics; Turley analysis

- 6.8 When applying the aforementioned tendencies to these projections, it can be estimated that homes with two bedrooms will most often be needed, in both scenarios across either time period. Properties with three bedrooms will though be needed almost as often, especially in the higher job growth scenario. Differences between the scenarios can be seen to be relatively subtle, and indeed the proportionate split remains very similar to what was previously reported in the HENAU¹⁰⁵.

Table 6.1: Estimated Size of Housing Needed in Stoke-on-Trent

	Meeting minimum need, 2020-40	Meeting minimum need, 2020-45	Supporting higher job growth, 2020-40	Supporting higher job growth, 2020-45
1 bed	14%	13%	13%	12%
2 beds	42%	42%	41%	41%
3 beds	38%	38%	39%	40%
4+ beds	6%	7%	7%	7%
Total	100%	100%	100%	100%

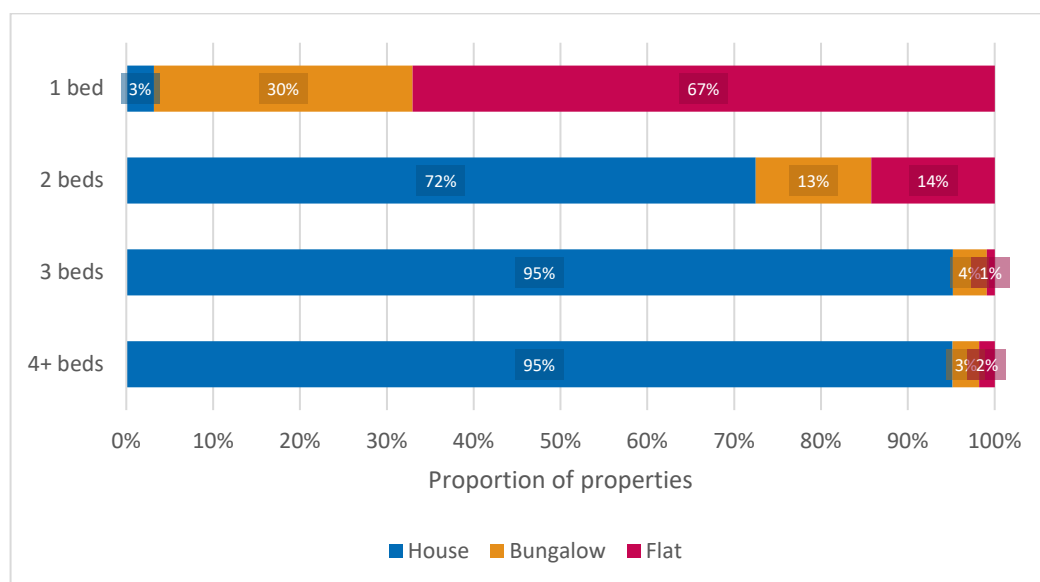
Source: Edge Analytics; Census 2021; Turley analysis

¹⁰⁵ Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent, Table 6.1

Implications for the type of housing needed

- 6.9 Both the original HNA and the HENAU also estimated the *type* of housing that could be needed in Stoke-on-Trent to deliver homes of the requisite size, drawing upon data from the VOA which confirmed how many of its existing homes of each size were houses, bungalows and flats.
- 6.10 This dataset is updated annually, with the most recent release for 2024¹⁰⁶ – already introduced in section 3 – confirming for instance that around two thirds of all one-bed properties in Stoke-on-Trent are flats. This falls to only 14% of homes with two bedrooms, roughly as many as are bungalows, with houses more prevalent and even more so for larger homes with at least three bedrooms.

Figure 6.3: Profile of Different Sized Housing in Stoke-on-Trent (2024)



Source: VOA

- 6.11 Based on this profile of existing homes, it can be reasonably assumed that meeting the need for different property sizes – summarised in the earlier Table 6.1 – could require the majority of new homes to be houses. Fewer would need to be flats and fewer still bungalows. Differences between the scenarios, and over the two different time periods, are once again only modest and there remains close alignment with what was previously reported in the HENAU¹⁰⁷.

¹⁰⁶ VOA (October 2024) Council Tax: stock of properties, 2024

¹⁰⁷ Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent, Table 6.2

Table 6.2: Estimated Type of Housing Needed in Stoke-on-Trent

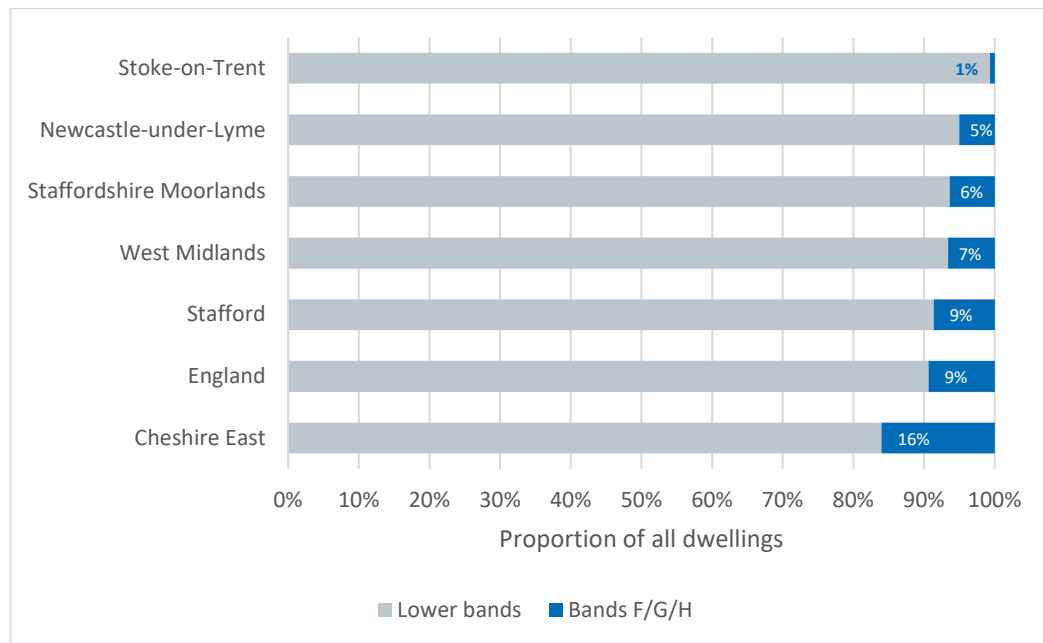
	Meeting minimum need, 2020- <u>40</u>	Meeting minimum need, 2020- <u>45</u>	Supporting higher job growth, 2020- <u>40</u>	Supporting higher job growth, 2020- <u>45</u>
House	73%	73%	74%	75%
Bungalow	11%	11%	11%	11%
Flat	16%	16%	15%	14%
Total	100%	100%	100%	100%

Source: Edge Analytics; Census 2021; Turley analysis

Interpreting the evidence

- 6.12 The above – like the equivalent analysis in both the HENAU and the original HNA – continues to represent only illustrative modelling, using available evidence. The previous reports made clear that it can be used for guidance and monitoring purposes but should not be prescribed as an explicit requirement for all sites, given the need to respond to changing market demands, local context and viability factors.
- 6.13 Consideration can also still be given to other factors in establishing an appropriate mix, such as the Council’s longstanding ambitions to improve the quality of its housing offer through the provision of executive housing as a means of satisfying the higher earners that have historically tended to move elsewhere. Several of the stakeholders engaged as part of this study highlighted the same issue, expressing beliefs that such quality housing, in attractive environments – with access to schools, green spaces and local services – can help to retain those that would otherwise move elsewhere.
- 6.14 This has long been at least partly attributed to the relative lack of higher value housing in Stoke-on-Trent, which is reaffirmed by the latest VOA data confirming – as of 2024 – that only 1% of the city’s homes are in the highest Council Tax bands (F/G/H) compared to 7% across the West Midlands and 9% throughout England as a whole. Only three authorities in the country – in Kingston upon Hull; Sandwell; and Barking and Dagenham – have proportionately fewer such properties and neighbouring areas continue to have considerably more, none themselves ranking even in the lowest 100 of all 296 local authorities.

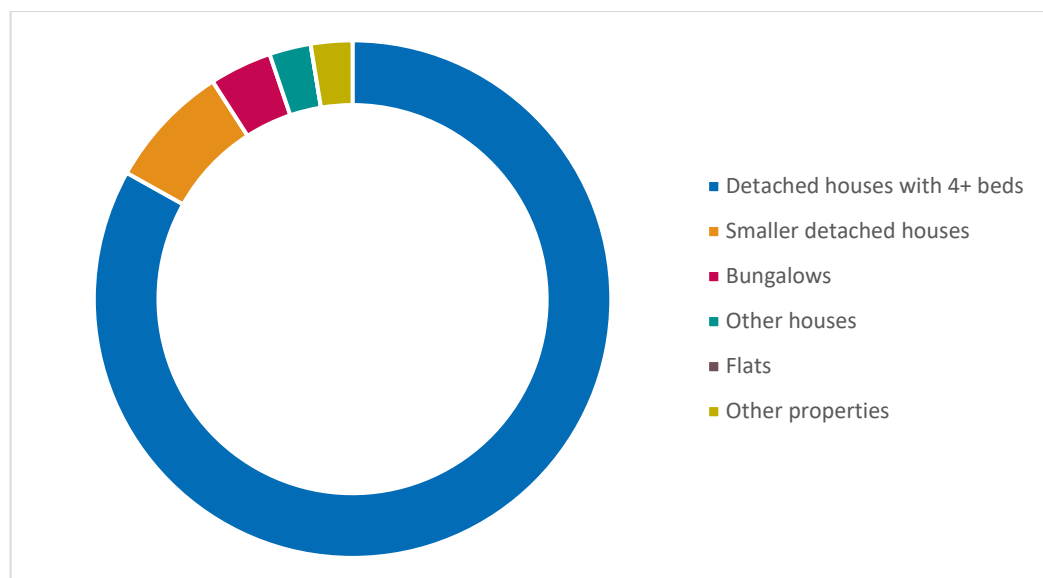
Figure 6.4: Comparing the Proportion of Homes in Highest Council Tax Bands (2024)



Source: VOA; Turley analysis

- 6.15 The same data confirms that the few homes in the highest Council Tax bands in Stoke-on-Trent continue to share a broadly consistent profile, some 83% being detached houses with a minimum of four bedrooms.

Figure 6.5: Profile of Homes in Highest Council Tax Bands in Stoke-on-Trent



Source: VOA; Turley analysis

- 6.16 It follows that the provision of such large detached houses in Stoke-on-Trent is likely to offer the greatest opportunity to increase the presently limited supply of higher value properties, in the highest Council Tax bands.
- 6.17 The NPPF does continue to expect planning policies to seek to address *'inadequate...housing'* wherever this is viewed as a *'potential barrier to investment'*, and this is proposed to remain in the new NPPF in order to *'support business investment and employment'* and create *'the conditions for long term economic growth'*¹⁰⁸.
- 6.18 The Council would consequently be justified in pursuing a policy-led approach that provides a greater number of large homes, with the necessary infrastructure, in order to address deficiencies in the existing stock and support its longstanding economic aspirations.

Summary

- 6.19 Both the original HNA and subsequent HENAU used data from the 2011 Census to establish households' varying tendencies to occupy different sizes of housing in Stoke-on-Trent, subsequently applying these rates to the additional households that were then projected to form.
- 6.20 This can be repeated using newer data that is now available from the 2021 Census, confirming that there has been no fundamental change but still a slight shift towards larger homes.
- 6.21 If existing trends endure amongst the households now projected to form – based on updated modelling linked both to the outcome of the standard method and to a higher level of job growth – then it would still be homes with two bedrooms that are most often needed, due to their profile of these households in each scenario. Homes with three bedrooms would though be needed almost as often, especially in the higher job growth scenario.
- 6.22 Achieving the required mix could in turn require the majority of new homes to be houses, based on the profile of the existing stock. Fewer would need to be flats and fewer still bungalows.
- 6.23 These do though continue to represent only illustrative estimates that can be used for guidance and monitoring, or as a starting point for proposed market housing where affordable housing is considered separately in the next section. They should not be rigidly applied to all sites, given the need to respond to changing market demands, local context, the characteristics of particular locations and viability factors, and there could also be an economic case for targeting a greater number of larger detached homes – with at least four

¹⁰⁸ MHCLG (December 2024) National Planning Policy Framework, paragraph 86d; MHCLG (December 2025) National Planning Policy Framework: draft text for consultation, Policy E1

bedrooms – to address a longstanding deficiency and support the Council’s aim of retaining higher earners that often move elsewhere.

7. Need for Affordable Housing

- 7.1 The NPPF continues to require the needs of *‘those who require affordable housing’* to be assessed and reflected in planning policies, with this also continuing to be specified in the draft text that was recently subject to consultation¹⁰⁹.
- 7.2 The PPG likewise continues to offer guidance on how those needs should be calculated, confirming that the *‘total net need’* should *‘subtract total available stock from total gross need’*, with the outcome then converted into *‘an annual flow based on the plan period’*¹¹⁰. While elements are now open to interpretation, such an approach was previously followed to estimate the need for affordable housing in the original HNA, with the subsequent HENAU making only minor updates in reporting a net need for 124 such homes annually over the period from 2020 to 2040¹¹¹.
- 7.3 While the RMA has since separately estimated that some 539 affordable homes are needed annually¹¹² – over the slightly shorter period from 2024 to 2040 – the Council has requested a further update that is therefore set out within this section, drawing upon information supplied by the Council which has been supplemented as necessary with secondary data.

Current and future gross need

- 7.4 The first part of the calculation identifies both the existing backlog of households in need of affordable housing and the additional need that could be continuously generated in future, as existing households’ circumstances change and new households form but are unable to access the home that they need on the open market.

Current need for affordable housing (A)

- 7.5 The Council’s housing register identifies existing households who report themselves, and it accepts, as being in need of affordable housing. The PPG continues to explicitly acknowledge that housing registers provide *‘relevant information’* for this type of assessment, and while it also identifies other data

¹⁰⁹ MHCLG (December 2024) National Planning Policy Framework, paragraph 63; MHCLG (December 2025) National Planning Policy Framework: draft text for consultation, Policy HO1 paragraph 2a

¹¹⁰ PPG Reference ID 67-08-20190722

¹¹¹ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, section 6; Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent, p31-33

¹¹² ORS (July 2025) Stoke-on-Trent Residential Mix Assessment, paragraph 4.45

sources – seemingly relied upon by the RMA¹¹³ – it rightly warns of the risk of double counting and emphasises that care should be taken to include ‘*only those households who cannot afford to access suitable housing in the market*’¹¹⁴. Given that a household’s ability to do so is comprehensively assessed when applying to join the housing register, it is considered the most suitable and reliable source of information for the purposes of this assessment, as it was in the original HNA and indeed in the earlier studies that it referenced as it introduced its approach¹¹⁵.

- 7.6 The Council shared a snapshot of its housing register in January 2026, confirming that 2,826 households were at that point enrolled in the highest priority bands¹¹⁶. Circa 859 already occupy affordable housing, which is implied to be inadequate, but the majority do not currently live in such a home. Homes with only one bedroom are most often required, followed by those with two, with such a profile of need having been reaffirmed by several of the registered providers engaged as part of this study.

Table 7.1: Current Need for Affordable Housing (A)

	1 bed	2 beds	3 beds	4+ beds	Total
A1 Existing affordable housing tenants in need	345	157	216	141	859
Applications to transfer					
A2 Others on housing register	969	551	328	119	1,967
Applications excluding transfers					
A3 Total housing need currently A1 + A2	1,314	708	544	260	2,826
%	46%	25%	19%	9%	100%

Source: Council records; Turley analysis

¹¹³ Figure 19 of the RMA suggests that a range of secondary datasets have been used to calculate the ‘*current unmet gross need*’ for affordable housing

¹¹⁴ PPG Reference ID 67-006-20190722

¹¹⁵ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, paragraph 6.6

¹¹⁶ Bands 1-3, with the Council agreeing that those in Band 4 should not be included in the calculation

Future need for affordable housing (B)

- 7.7 It remains more challenging to predict the scale of future need, compared to the need outlined above which exists at the current point in time and can therefore be quantified.
- 7.8 The PPG continues to provide less guidance than it has in the past on how to estimate the *‘projected number of households who lack their own housing or who cannot afford to meet their housing needs in the market’*, albeit previous guidance on how to calculate *‘the number of newly arising households likely to be in affordable housing need’* is still in place¹¹⁷. This confirms that this stage of the assessment should *‘reflect new household formation’* and although it does not specify precisely how this should be calculated, older guidance¹¹⁸ – outlining in more detail the approach that is still broadly followed – does continue to assist in this regard. It endorses use of a *gross* annual household formation rate, rather than measuring net additional households, so this has been calculated by Edge Analytics – as it was in the original HNA¹¹⁹ – based on the newly developed scenario which assumes that the minimum need suggested by the standard method is met in full.
- 7.9 The PPG also refers to *‘the proportion of newly forming households unable to buy or rent in the market area’*¹²⁰. This can once again be estimated, as in the original HNA, through an affordability benchmarking exercise which compares the cost of purchasing or privately renting to households’ income. While it is still important to acknowledge that the latter will not be the only factor determining whether a household will be able to access the market – with income type, credit score and savings also crucial – there is generally less robust and consistent data available on these factors at the local level. It is equally still not possible to isolate the income of those requiring different sizes of property, making it necessary to consider costs overall before assuming that households will require comparably sized homes to those currently on the housing register, excluding transfer tenants.
- 7.10 Focusing first on purchase, the Land Registry data introduced at the earlier Figure 3.8 can be used – as it was in the original HNA¹²¹ – to calculate the lower quartile price paid for housing in Stoke-on-Trent, during 2024 as the last calendar year to have been completely reported (£92,000). Assumptions can be made to estimate the associated monthly cost of a mortgage, with it envisaged for the purposes of this assessment that households could access the average

¹¹⁷ PPG Reference ID 67-006-20190722; PPG Reference ID 2a-021-20190220

¹¹⁸ Department for Communities and Local Government (2007) Strategic housing market assessments: practice guidance, Annex B

¹¹⁹ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, paragraph 6.11

¹²⁰ PPG Reference ID 2a-021-20190220

¹²¹ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, paragraph 6.13

five-year fixed rate that is available in March 2026¹²² (4.49%) and repay over 25 years, having put down a 5% deposit. A mortgage for an entry-level property in Stoke-on-Trent would cost an estimated £485 per month on these terms.

- 7.11 This is notably below the mean private rent that is now reported by the ONS, with the earlier Figure 3.10 confirming that this stood at £698 per month as of January 2026¹²³. This is itself higher than the benchmark of £400 per month that was used in the original HNA, and while a directly comparable lower quartile – no longer reported by the ONS – would presumably be lower, it would need to be at least 31% lower to fall below the cost of purchasing at the entry level. This is considered unlikely where the lower quartile, at the time of the original HNA, was only 18% lower than the mean¹²⁴.
- 7.12 The income required to purchase or rent housing in Stoke-on-Trent can both still be estimated based on the above, aligning with a recent report from the English Housing Survey by assuming that no more than 30% of gross household income is spent on housing costs¹²⁵. This is slightly lower than the benchmark of one third used in the original HNA – and indeed earlier studies – but has been preferred where that originated from a study that is now almost twelve years old¹²⁶.
- 7.13 The resulting benchmarks can be compared to the income profile of households in Stoke-on-Trent, as reported in Paycheck data obtained from CACI. This assigns all households to different income bands, thus providing an indication of how many earn less than a certain amount, even if some rounding is required to align with the reported bandings¹²⁷. Such a process indicates that around 28% of households are unable to afford the cost of purchasing an entry-level home, whereas more – circa 42% – are unable to afford the higher mean monthly rent.

¹²² As reported by [Rightmove](#) in early March 2026

¹²³ ONS (February 2026) Price Index of Private Rents, UK: monthly price statistics

¹²⁴ ONS (December 2019) Private Rental Market Statistics, October 2018 to September 2019

¹²⁵ MHCLG (May 2025) English Housing Survey 2023 to 2024: experiences of the 'housing crisis'

¹²⁶ Resolution Foundation (August 2014) Housing pinched: understanding which households spend the most on housing costs

¹²⁷ While this technically requires rounding to the nearest £5,000, it is possible to round to the nearest £2,500 – and so provide more nuanced analysis – by assuming that households are evenly spread within each band, with half earning more than its midpoint and half earning less

Table 7.2: Income Required to Access Entry-Level Market Housing in Stoke-on-Trent

	Annual cost	Income required	Rounded	Able to afford	Unable to afford
Purchase	£5,824	£19,412	£20,000	72%	28%
Private rent	£8,376	£27,920	£27,500	58%	42%

Source: ONS; Land Registry; CACI; Turley analysis

- 7.14 The above is ultimately intended to estimate the proportion of newly forming households that could be unable to access open market housing, like the equivalent analysis in the original HNA¹²⁸. While it has once again used an income profile that captures all households – including recently formed households, working households and older households with pensions – there remains no local evidence showing how income varies between different household types in Stoke-on-Trent. In the absence of more comprehensive data, it is therefore necessary to assume – for the purposes of this calculation – that the income profile of newly forming households aligns with that of all existing households, and that those unable to afford the cost of purchasing at the entry level will require affordable housing. It should though be recognised that some of those households who are technically able to purchase or indeed rent may still require affordable housing, noting the assumed availability of a deposit or the ability to borrow money via a mortgage.
- 7.15 Beyond newly forming households, the PPG also continues to require ‘*an estimate of the number of existing households falling into need*’, when their financial or family circumstances change for example¹²⁹. This can be based on the average number of such households receiving lettings over the last three years, using data supplied by the Council¹³⁰.
- 7.16 When drawing these elements together, Table 7.3 suggests that a new gross need for 999 could arise each year from new and existing households in Stoke-

¹²⁸ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, Table 6.2

¹²⁹ PPG Reference ID 2a-021-20190220

¹³⁰ While this excludes households who joined the housing register but could not be accommodated in the same period, the data shared by the Council does not specify the date on which households joined the housing register, making it impossible to isolate existing households who remain on the housing register having not received a letting

on-Trent. This notably compares to what was reported in the HENAU, after it made minor changes to the calculation presented in the original HNA¹³¹.

Table 7.3: Future Need for Affordable Housing (B)

	1 bed	2 beds	3 beds	4+ beds	Total
B1 New household formation, gross					
Edge Analytics' projection based on outcome of standard method	–	–	–	–	2,715
B2 Proportion of newly forming households unable to purchase					
Derived from ONS and CACI data	–	–	–	–	28%
B3 Newly forming households unable to purchase					
B2 applied to B1 and split based on housing register	377	215	128	46	766
B4 Existing households falling into need					
Households from other tenures annually receiving lettings	108	58	62	5	233
B5 Newly arising need, gross annual B3 + B4	485	273	190	51	999
%	49%	27%	19%	5%	100%

Source: Council records; Turley analysis

Total gross need for affordable housing (C)

- 7.17 When combining the current need with the estimated future need, assumed to arise annually over the remaining 15 years to 2040 – used here for simplicity – it can be estimated that circa 1,187 households throughout Stoke-on-Trent will need affordable housing each year, most often but not exclusively requiring one or two bedrooms. This represents a **gross** figure, taking no account of supply which is incorporated into the next stage of the calculation as required by the PPG.

¹³¹ Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent, Table 6.3

Table 7.4: Total and Annual Gross Need for Affordable Housing (C)

	1 bed	2 beds	3 beds	4+ beds	Total
C1 Total housing need currently ^{A3}	1,314	708	544	260	2,826
C2 Total newly arising need over 15 years ^{B5 x 15}	7,275	4,095	2,850	765	14,985
C3 Total gross need over 15 years ^{C1 + C2}	8,589	4,803	3,394	1,025	17,811
C4 Annual gross need over 15 years ^{C3 / 15}	573	320	226	68	1,187
%	48%	27%	19%	6%	100%

Source: Council records; Turley analysis

Accounting for supply (D)

- 7.18 The PPG continues to recognise that *‘there will be a current supply of housing stock that can be used to accommodate households in affordable housing need...as well as future supply’*¹³². This supply can therefore be assumed to contribute towards meeting the gross need calculated above, at least in a quantitative sense.
- 7.19 Lettings data supplied by the Council confirms the number of affordable homes that have become available to non-transfer tenants over the last three years, on average. This can reasonably inform an assumption on the number of such properties that will become available in future, albeit it is acknowledged that this may be susceptible to change when accounting for losses through Right to Buy and the extent of replacement.
- 7.20 A further source of supply emerges when it is recognised that some of the households currently in need of affordable housing already occupy such homes, which will therefore be vacated when their needs are met. Allowance for these transfers is therefore made within the calculation.
- 7.21 The calculation should also take account of *‘future supply’*, namely affordable homes that are expected to be delivered. The Council has shared details of what it considers to be committed affordable housing schemes, and while unit mixes are not always known assumptions can be reasonably derived from those that are. The Council has not identified any vacant affordable homes that could be

¹³² PPG Reference ID 67-007-20190722

reasonably expected to return to use and thus add to the available supply in the future.

- 7.22 When the above are combined, it is suggested that circa 800 affordable homes could become available every year in Stoke-on-Trent, all but around a fifth containing either one or two bedrooms.

Table 7.5: Assumed Supply to 2040 (D)

	1 bed	2 beds	3 beds	4+ beds	Total
D1 Committed supply of affordable housing Projects identified by the Council	1,017	283	87	0	1,387
D2 Affordable homes occupied but vacated by households in need A1	345	157	216	141	859
D3 Vacant affordable homes returning to use	0	0	0	0	0
D4 Emerging supply over 15 years (D1 + D2 + D3) / 15	91	29	20	9	150
D5 Lettings to new tenants per annum Lettings data supplied by the Council excluding transfers	291	223	128	8	650
D6 Estimated annual supply D4 + D5	382	252	148	17	800
%	48%	32%	19%	2%	100%

Source: Council records; Turley analysis

Net need to 2040

- 7.23 The projected supply of 800 affordable homes per annum is lower than the estimated gross need for 1,187 such homes each year, suggesting that there is a net annual need for circa **387 affordable homes** in Stoke-on-Trent beyond the existing and expected future supply. While there is an implied need for all sizes of affordable housing, the greatest need is suggested as being for properties with one bedroom, followed by those with two, albeit roughly a third of the total net need does relate to larger homes with at least three bedrooms.

Table 7.6: Estimated Net Need for Affordable Housing (2025-40)

	1 bed	2 beds	3 beds	4+ beds	Total
Annual gross need over 15 years ^{C4}	573	320	226	68	1,187
Estimated annual supply ^{D6}	382	252	148	17	800
Net need per annum ^{C4 – D6}	191	68	78	51	387
%	49%	18%	20%	13%	100%

Source: Turley analysis

- 7.24 While the above covers the period to 2040, for simplicity, the net annual need would slightly reduce to **378 per annum** if it was to be instead calculated over the period to 2045. This is primarily due to the backlog being cleared over a longer period of time in such a scenario.
- 7.25 Either figure is more than three times the need for only 124 affordable homes per annum that was previously reported in the HENAU, albeit over a different time period (2020-40). They are though each around a third below the need for 539 affordable homes per annum that was quantified in the RMA, over a more comparable – if still not identical – period from 2024 to 2040. This arguably only reinforces that the need has risen since the original HNA and subsequent HENAU were produced, with this report's variance from the recent RMA due either to the passage of time or – more likely – their application of guidance that requires some individual interpretation. It is important to emphasise that this updated calculation does not invalidate that of the RMA.

Considering likely delivery

- 7.26 The PPG does require this newly calculated need for 378 or 387 affordable homes per annum – depending on the period covered – to be '*considered in the context of its likely delivery as a proportion of mixed market and affordable housing developments*', so that the Council can consider whether there needs to be '*an increase in the total housing requirement...[to] help deliver the required number of affordable homes*'¹³³.
- 7.27 The Council proposed, in last year's Regulation 18 consultation, that 20-35% of the homes provided on larger sites of at least 10 dwellings would be affordable¹³⁴. On a purely numerical basis, this could theoretically require the

¹³³ PPG Reference ID 2a-024-20190220

¹³⁴ Stoke-on-Trent City Council (September 2025) Stoke-on-Trent Draft Local Plan 2020-2040: Regulation 18 Consultation Document, Policy H 3

provision of between 1,080 and 1,935 dwellings per annum to meet the annual need for affordable housing in full, albeit the lower end of this range – which compares to the overall estimates of need presented in section 5 – is likely an underestimate since not all sites will be obliged to provide such housing.

- 7.28 Basic calculations of this kind do though oversimplify what is widely known to be a complex relationship between market and affordable housing. These complexities have previously led the High Court to confirm that neither the NPPF nor the PPG require affordable housing needs to be met in full when determining the overall need for housing, with the Court of Appeal – in upholding this judgment – subsequently confirming that *‘planning judgment’* is required¹³⁵. The Council will therefore need to exercise this in selecting a housing requirement for the new Local Plan, balancing the prospective delivery of affordable housing against other factors.

Role of different affordable housing products

- 7.29 The original HNA highlighted the previous Government’s acknowledgement that housing providers were being increasingly innovative in their efforts to meet the needs of those households who were unable to access market housing. It aimed to facilitate this innovation by amending the NPPF’s definition of affordable housing in 2019¹³⁶.
- 7.30 This definition was effectively retained in the updated NPPF that was published by the current Government in December 2024, as indeed it is proposed to be in the further version that was recently subject to consultation. Annex B of the latter continues to describe affordable housing as *‘housing for sale or rent, for those whose needs are not met by the market’*, confirming that this includes *‘housing that provides a subsidised route to home ownership’* as well as that which is *‘for essential local workers’* or indeed now for *‘national military housing needs’*, the latter being the only addition that is proposed¹³⁷.
- 7.31 The revisions of December 2024 did though place a greater emphasis on social rent, more explicitly distinguishing it from *‘other affordable housing for rent’* –

¹³⁵ Borough Council of Kings Lynn and West Norfolk v Secretary of State for Communities and Local Government, ELM Park Holdings Ltd [2015] EWHC 2464 (Admin); Jelson Ltd v Secretary of State for Communities and Local Government and Hinckley and Bosworth Borough Council [2018] EWCA Civ 24

¹³⁶ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, p78-79

¹³⁷ MHCLG (December 2024) National Planning Policy Framework, Annex 2; MHCLG (December 2025) National Planning Policy Framework: draft text for consultation, Annex B

so as to give ‘*clearer priority*’ to this product¹³⁸ – even if the definitions themselves were, and are proposed to remain, effectively unchanged¹³⁹. The Government has also removed what had become a redundant definition for Starter Homes, with this concept ultimately never taken forward by the previous administration¹⁴⁰.

- 7.32 It is within this context that this section proceeds to reconsider how the products referenced in both the current and emerging NPPF could help to meet the evidenced need for affordable housing in Stoke-on-Trent. It focuses first on affordable home ownership before turning to rental products, evolving the approach of the original HNA by explicitly considering the residual need for social rent.

Affordable routes to home ownership

- 7.33 Both the current and emerging NPPF continue to refer to discounted market sale (DMS) which, as the original HNA explained, must cost at least 20% less than market value¹⁴¹.
- 7.34 A minimum such discount is also expected of any ‘*other low cost homes for sale*’, within the broader category of ‘*other affordable routes to home ownership*’¹⁴².
- 7.35 While numerous stakeholders report having recently experimented with such products in Stoke-on-Trent, at least one observed a general lack of uptake and indeed momentum, which it partly attributed to the availability of low-cost homes for outright purchase as well as restrictive property valuations.
- 7.36 It is though being explored by the Council’s housing team and so the relative affordability of such a product can therefore be estimated – as in the original HNA – by calculating the likely annual cost of purchase with a mortgage, after applying a discount to what would be a newly-built property. The breakdown offered by the aforementioned Land Registry data does confirm – as a stakeholder noted – that such properties are priced at a premium in Stoke-on-Trent, with the lower quartile price paid for a newly-built property in 2024

¹³⁸ MHCLG (February 2025) Government response to the proposed reforms to the National Planning Policy Framework and other changes to the planning system consultation, response for Questions 52 and 53

¹³⁹ Each of the conditions that are currently, and proposed to carry on being, specified for social rent were previously contained in the broader definition for “affordable housing for rent”, with the latter having explicitly referenced social rent at various points

¹⁴⁰ National Audit Office (November 2019) Investigation into Starter Homes

¹⁴¹ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, paragraph 6.39

¹⁴² MHCLG (December 2024) National Planning Policy Framework, Annex 2; MHCLG (December 2025) National Planning Policy Framework: draft text for consultation, Annex B

some 74% higher than when all sales are included (£160,450 vs. £92,000). A similar situation was reported in the original HNA¹⁴³.

- 7.37 It is for this reason that a discount of 40% is implied to be needed simply to make newly-built housing as affordable as the average home sold in Stoke-on-Trent, factoring resales into the latter. With the calculation in this section assuming that only those unable to purchase will need affordable housing, DMS would appear likely to play only a limited role in meeting the need that has been quantified, as was previously concluded by the original HNA¹⁴⁴.

Table 7.7: Benchmarking Cost of Discounted Housing for Sale

	Price of home	Annual cost of mortgage or rent	Income required	Hholds <i>unable</i> to afford	Variance from any purchase
Purchase*	£160,450	£10,157	£33,855	54%	+26%
Market rent	–	£8,376	£27,920	42%	+14%
20% discount*	£128,360	£8,125	£27,084	42%	+14%
30% discount*	£112,315	£7,110	£23,699	33%	+5%
40% discount*	£96,270	£6,094	£20,313	28%	0%
Purchase^	£92,000	£5,824	£19,412	28%	–

Source: ONS; Land Registry; CACI; Turley analysis * new home ^ any home

- 7.38 There does remain the further option of shared ownership, through which households buy a 25-50% share of a new home and pay rent on the remaining share, in addition to their mortgage¹⁴⁵. Stakeholders do again report a lack of uptake, in part due to concerns about staircasing, and one reported its model to be less compatible with markets like Stoke-on-Trent having been found to perform best in higher-density developments in higher-value locations. Another is though considering diversifying into shared ownership, to broaden provision, and the Council's housing team is also known to be exploring the product.
- 7.39 Table 7.8 does though suggest that shared ownership would also be only as affordable as purchasing an entry-level home in Stoke-on-Trent, when factoring

¹⁴³ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, paragraph 6.42

¹⁴⁴ *Ibid*, p82

¹⁴⁵ Rent assumed to be equivalent to 2.75% of the unsold equity, as in the original HNA, to align with the Capital Funding Guide produced by Homes England

in resales, albeit it could still play a particular role due to the smaller deposit that would theoretically be required¹⁴⁶.

Table 7.8: Benchmarking Cost of Shared Ownership

	Annual cost of mortgage	Rent p.a.	Total cost p.a.	Income required	Hholds unable to afford	Variance from any purchase
Purchase*	£10,157	–	£10,157	£33,855	54%	+26%
Market rent	–	£8,376	£8,376	£27,920	42%	+14%
50% share*	£5,078	£2,206	£7,284	£24,281	38%	+10%
25% share*	£2,539	£3,309	£5,848	£19,495	28%	0%
Purchase^	£5,824	–	£5,824	£19,412	28%	–

Source: ONS; Land Registry; CACI; Turley analysis * new home ^ any home

Affordable housing for rent

- 7.40 Both the existing and emerging NPPF also continue to refer to a range of affordable housing products that are offered to rent. Some are expected to be priced relative to the local market – with discounts of at least 20% – and this would clearly offer a more affordable option than the private rental market in Stoke-on-Trent, as would be expected. A discount of 30% would though be needed to bring the average rent close to the cost of a mortgage for any entry-level home – notwithstanding that the latter would require an initial deposit¹⁴⁷ – and a larger discount, for instance of 40%, would be needed for such a product to become *more* affordable than purchasing. Almost a quarter of all households would remain unable to afford even this discounted rent, however, indicating that there will also be a need for lower cost social rent as considered further below.

¹⁴⁶ A 5% deposit when purchasing an entry-level home, at the lower quartile, would equate to circa £4,600 but this could fall to £4,011 when purchasing only a 50% share of a newly-built home, and halve again to only £2,006 when purchasing a 25% share

¹⁴⁷ Assumed to be £4,600 when purchasing a home costing £92,000 with a 5% deposit

Table 7.9: Estimated Annual Cost of Affordable Rent

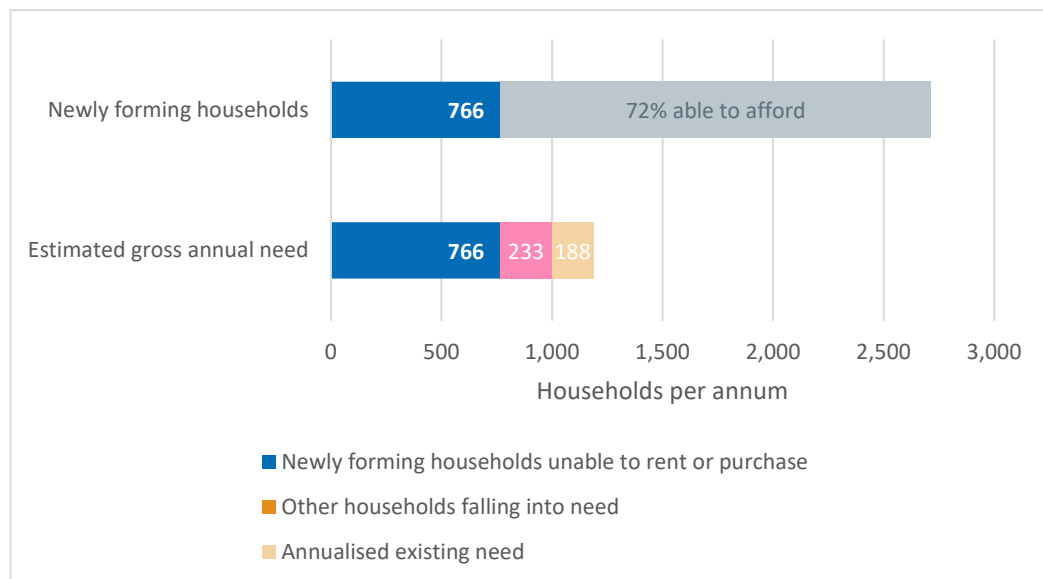
	Annual cost	Income required	Households <i>unable</i> to afford	Variance from any purchase
Market rent	£8,376	£27,920	42%	+14%
80% market rent	£6,701	£22,336	33%	+5%
70% market rent	£5,863	£19,544	28%	0%
Purchase	£5,824	£19,412	28%	–
60% market rent	£5,026	£16,752	23%	-5%

Source: ONS; Land Registry; CACI; Turley analysis

Bringing the analysis together

- 7.41 The calculation presented earlier in this section assumes, at Step B2, that 28% of newly forming households in Stoke-on-Trent will be unable to afford the cost of purchasing an entry-level property and will thus require affordable housing. Such households are responsible for around three quarters (77%) of newly arising need – the residual being existing households falling into need – and for almost two thirds (65%) of the overall gross need calculated at the earlier Table 7.4.

Figure 7.1: Households Unable to Purchase within Affordable Housing Need Calculation

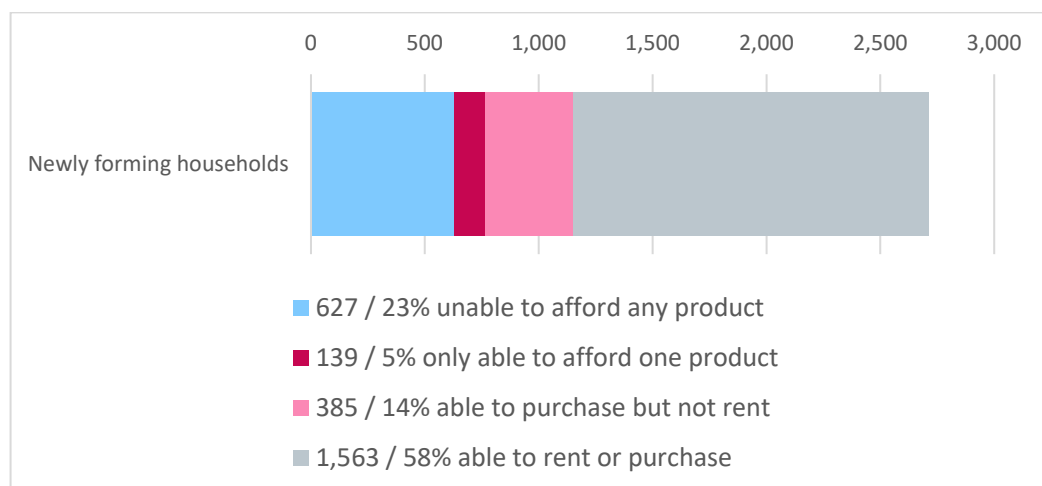


Source: Turley analysis

- 7.42 This section has shown there to be at least one product that could theoretically cost less than purchasing an entry-level home, and so help to meet some of the

need estimated earlier in this section. It is estimated that circa 5% of newly forming households would be unable to purchase but *could* afford rent discounted by 40%. These form around 18% of those newly forming households assumed to be generating a need for affordable housing in Stoke-on-Trent, as illustrated at Figure 7.2.

Figure 7.2: Newly Forming Households by Ability to Access Products



Source: Turley analysis

- 7.43 Households unable to afford any of the products considered in this section are implied to need social rented housing, the importance of which was emphasised by at least one stakeholder as a means of helping tenants to avoid “benefit traps” and offering long-term stability. The NPPF now expects local authorities to specify ‘*the minimum proportion of social rent homes required*’¹⁴⁸ – and it is proposed to carry on doing so¹⁴⁹ – and if this was to be based purely on this calculation of need, taking no account of viability nor the preferences of registered providers, then it could be argued that 82% of households will need social rented housing. This represents the estimated proportion of newly arising need, from newly forming households – as the main driver of need in Stoke-on-Trent – that cannot be met by another product.
- 7.44 While the residual need could ordinarily then be split between products – albeit only indicatively – this is complicated in this case by the suggestion that only one of the products considered, namely affordable rent, would cost less than purchasing an entry-level home on the open market. While this is consistent with the findings of the original HNA, delivering only this product alongside social rented housing would not provide the range of options that the NPPF has arguably long expected, and it would specifically offer no affordable home

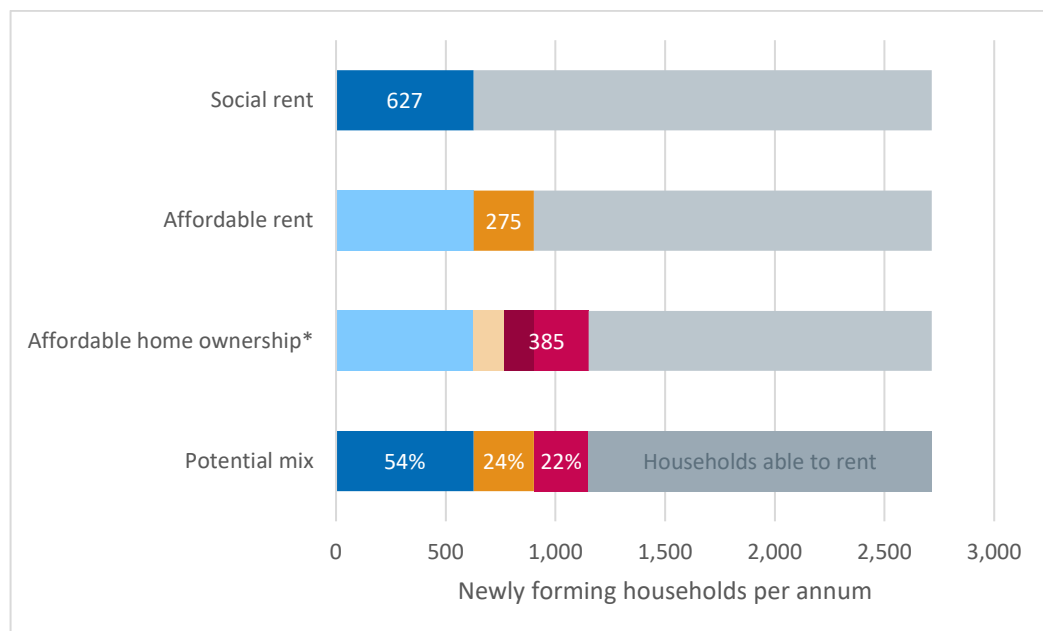
¹⁴⁸ MHCLG (December 2024) National Planning Policy Framework, paragraph 64

¹⁴⁹ MHCLG (December 2025) National Planning Policy Framework: draft text for consultation, Policy HO5 paragraph 1ai

ownership products despite their ability to play a potentially important role, by reducing the size of deposits for example.

- 7.45 If the aim is to therefore include a proportionate amount of such housing within the mix of affordable homes to be provided in Stoke-on-Trent, a solution could be to focus more broadly on the newly forming households that are unable to *rent*, rather than purchase, even if this would technically increase the need quantified earlier in this section. Circa 24% of these households could have their needs met by affordable rent and a further 22% may be able to afford one of the affordable home ownership products considered in this section, namely DMS or shared ownership. The residual 54% are then implied to need social rented housing.

Figure 7.3: Indicative Split of Affordable Housing Need in Stoke-on-Trent



Source: Turley analysis

* overlaps with affordable rent

- 7.46 It should though be emphasised that the above is only **indicative** and although it can arguably be used as a starting point in negotiations – subject to viability testing – such a mix of products should not be expected of every site. Developments providing a greater proportion of social rent, for example, would not only be offset by sites doing the opposite elsewhere in Stoke-on-Trent – by providing a greater amount of affordable home ownership products – but they would also themselves help to meet what is evidently a need for those products alone. A scheme’s individual contribution should therefore be carefully considered within this context.

Summary

- 7.47 This section has once again used the well-established methodology that was outlined in the original HNA to provide an updated position on the need for affordable housing in Stoke-on-Trent.
- 7.48 The first stage of the calculation establishes the scale and profile of affordable housing need in gross terms. It captures 2,826 households that are currently enrolled in priority bands on the Council's housing register and estimates that a further need for 999 affordable homes will arise each year as existing households' circumstances change and others form but are unable to afford market housing. Addressing the latter while clearing the existing backlog, initially to 2040, would result in a gross need for **1,187 affordable homes per annum**. It is estimated that homes with one bedroom will most often be needed, followed by those with two, but roughly a quarter would be expected to need at least three.
- 7.49 The PPG also expects supply to be taken into account, allowing not only for lettings but also projected completions and the release of affordable housing that is currently occupied. Data supplied by the Council suggests that **800 affordable homes** could become available each year, all but a fifth having either one or two bedrooms.
- 7.50 This is evidently lower than the estimated gross need, meaning that there is a **residual net need for 387 affordable homes per annum** over the period from 2025 to 2040, falling slightly to **378 per annum** over the longer period to 2045. Either would more than treble the annual need for only 124 affordable homes that was previously reported in the HENAU, over an admittedly different period, but they are both below the need for 539 affordable homes per annum that has been reported by the RMA in the interim. This updated calculation does not invalidate that assessment, with the variance likely explained by differing interpretations of guidance and potentially also the passage of time.
- 7.51 Meeting this need could require provision of substantially more homes than are implied to be needed even to support future job growth, based on the Council's emerging policies, but there is widespread acknowledgement of the complex relationship between market and affordable housing. It is therefore ultimately for the Council to exercise planning judgment in deciding how delivery could be supported in its choice of housing requirement.
- 7.52 This section has concluded by considering how the identified need for affordable housing could be met through the delivery of social rent, affordable rent, discounted market sale and shared ownership products. It has shown that the latter two ownership products may play only a limited role in meeting the need generated by newly forming households unable to purchase, since they would apply discounts only to new homes that are already priced at a premium,

making them cost more than (or the same as) resales even with discounts applied.

- 7.53 They could though meet the needs of those unable to *rent*, being affordable to at least 22% of households in this category. A further 24% could have their needs met by affordable rent – discounting market rents by 20-40% – but the residual 54% would likely be unable to afford even that and could thus require social rented housing. Such a mix is though reflective only of the calculated need, with the Council advised to seek the views of registered providers and consider viability before deciding on its approach for the emerging Local Plan.

8. Specific Housing Needs

- 8.1 The NPPF continues to require the housing needs of ‘*different groups in the community*’ to be ‘*assessed and reflected in planning policies*’, and while some rewording has been proposed its emerging replacement is set to similarly expect development plans to ‘*take into account an assessment of the size, type and tenure of housing or other accommodation needed for different groups*’¹⁵⁰.
- 8.2 The original HNA considered the specific needs of older and disabled people as well as families with children, privately renting households, students and those looking to build their own homes. This was only partially updated in the subsequent HENAU – to account for its new demographic modelling – but the RMA has since reconsidered the needs of these and other groups. This section draws together all of this analysis, and incorporates newer information wherever available, to set out the current position.

Older people

- 8.3 The original HNA identified how older people were a growing cohort of the population in Stoke-on-Trent that were likely to grow even further into the future¹⁵¹. This was later reaffirmed by the updated modelling presented in the HENAU¹⁵².
- 8.4 The RMA has subsequently confirmed the size and living arrangements of the older population as of the 2021 Census¹⁵³. While this continues to provide the most up-to-date information on the latter, the release of the further population estimates introduced in section 3 does at least confirm that this cohort has continued to grow, up to 2024. The number of residents aged 65 and above has grown by a further 3% since 2021, but it is notable that the number aged 75 and above has grown around three times faster, being the primary driver of growth in this older cohort¹⁵⁴.

¹⁵⁰ MHCLG (December 2024) National Planning Policy Framework, paragraph 63; MHCLG (December 2025) National Planning Policy Framework: draft text for consultation, Policy HO1 paragraph 2

¹⁵¹ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, p89-92

¹⁵² Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent, paragraph 6.30 and Table 6.4

¹⁵³ ORS (July 2025) Stoke-on-Trent Residential Mix Assessment, Figure 42 and Figure 43

¹⁵⁴ ONS (July 2025) Estimates of the population for England and Wales

Table 8.1: Recent Growth of Older Population (2021-24)

	2021	2024	Change	% change
Aged 65+	44,570	46,030	+1,460	+3.3%
Aged 75+	20,239	22,154	+1,915	+9.5%
Aged 85+	5,445	5,720	+275	+5.1%

Source: ONS

- 8.5 The earlier Table 5.2 confirms that the older population would be expected to carry on growing regardless of whether only the minimum need for housing is met or the Council plans for a higher level of job growth, over the period from 2020 either to 2040 or 2045. Table 8.2 shows that it would continue to be the eldest cohorts driving this growth, with the number aged 85 and above growing at the fastest rate.

Table 8.2: Projected Change in Older Population (2020-40/45)

	65+	75+	85+
2020	44,224	20,062	5,368
2040 if minimum need met	53,879	27,310	8,039
% change to 2040 if minimum need met	+22%	+36%	+50%
2045 if minimum need met	54,572	29,353	8,875
% change to 2045 if minimum need met	+23%	+46%	+65%
2040 with higher job growth	55,103	27,923	8,239
% change to 2040 with higher job growth	+25%	+39%	+53%
2045 with higher job growth	56,357	30,295	9,179
% change to 2045 with higher job growth	+27%	+51%	+71%

Source: ONS; Edge Analytics

- 8.6 Both the original HNA and subsequent HENAU noted how their comparable demographic modelling from Edge Analytics made assumptions around the number of people living in a communal establishment such as a care home, rather than a private home. While this aligned in each case with the approach of the 2014-based household projections – allowing for rising demand as the older population grows – the ONS has changed its approach in the latest 2022-based projections and now fixes the number of people living in communal establishments, based on the number recorded by the 2021 Census. Edge Analytics have opted to retain the previous approach in their own modelling,

fixing the *proportion* of those aged 75 and above that were not in private households as of the 2021 Census – while keeping younger cohorts fixed – and so allowing for growth as the older cohort increases in size.

- 8.7 This suggests that the communal population of Stoke-on-Trent could increase by 518 persons between 2020 and 2040, or by 648 persons to 2045 – either equivalent to circa 26 persons per annum – if the minimum need suggested by the standard method is met to either point. This would slightly increase to 556 persons and 707 persons respectively, each equivalent to 28 per annum on average, if a higher level of job growth was to be supported. With this growth continuing to be wholly attributable to those aged 75 and above, as previously, it can again be taken to suggest a need for additional bedspaces in elderly care and nursing homes which continues to be **excluded from and additional to** the reported need for dwellings.

Table 8.3: Projected Change in Communal Population of Stoke-on-Trent

	Total change, 2020- <u>40</u>	Average per annum, 2020- <u>40</u>	Total change, 2020- <u>45</u>	Average per annum, 2020- <u>45</u>
Meeting minimum need	518	26	648	26
Supporting higher job growth	556	28	707	28

Source: Edge Analytics

- 8.8 It should be noted that, as previously, no attempt has been made to consider how other forms of specialist housing – possibly in different use classes – could meet this distinct need for bedspaces¹⁵⁵. This reflects ongoing uncertainty around residents’ requirements and preferences. The extent to which existing residents are suitably accommodated has also not been considered, due to a lack of robust data with which to quantify a further need that will almost certainly exist to at least some extent.
- 8.9 Beyond this distinct need for communal accommodation that is additional to private dwellings, there is also likely to remain a need for other types of specialist housing for older people. The original HNA introduced the Strategic Housing for Older People Analysis (SHOP@) toolkit that was then explicitly referenced in the PPG as ‘*a tool for forecasting the housing and care needs of older people*’, estimating as it did the rate at which those aged 75 and above could require different forms of specialist housing provision¹⁵⁶. It applied these rates to the projected number of such residents, as did the subsequent HENAU

¹⁵⁵ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, paragraph 7.20

¹⁵⁶ *Ibid*, paragraph 7.21

having noted that the tool continued to be '*widely used in similar studies*' and was '*still explicitly referenced in the PPG*'¹⁵⁷.

- 8.10 While this reference remains at the time of writing, the RMA has subsequently outlined some of the limitations of this particular toolkit, while signposting another '*baseline model*' that has been developed by the Sheffield Hallam University Centre for Regional Economic and Social Research¹⁵⁸ (CRESR). It is believed to have opted for an approach that essentially blends such rates with existing trends in Stoke-on-Trent, where they are higher on average¹⁵⁹.
- 8.11 Such an approach cannot be simply replicated, in part due to the overlap between Edge Analytics' in-built assumptions on the number of people needing bedspaces in care homes and the RMA's reporting of a need only for '*housing with support*' and '*housing with care*'¹⁶⁰. It is therefore proposed to revert to the SHOP@ rates for the purposes of this particular assessment, which is not intended to wholly invalidate the RMA.
- 8.12 When applying what are unchanged rates set out in the original HNA, it is estimated that growth in the older population aged 75 and above could generate demand for between 62 and 70 units of specialist accommodation each year, depending on the scenario and period covered. This is below the equivalent range from the HENAU (73-78pa) as well as what was subsequently reported by the RMA¹⁶¹ (80pa) albeit the latter is not directly comparable having seemingly included bedspaces in care homes that are here considered separately.

¹⁵⁷ Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent, paragraph 6.32

¹⁵⁸ ORS (July 2025) Stoke-on-Trent Residential Mix Assessment, p51-52

¹⁵⁹ *Ibid*, paragraph 5.25

¹⁶⁰ *Ibid*, Figure 46

¹⁶¹ *Ibid*, Figure 46. This represents the total need for 1,274 units divided by 16 years (2024-40)

Table 8.4: Projected Demand for Specialist Housing in Stoke-on-Trent

	Rate per 1,000 aged 75+	Min. need, 2020- <u>40</u>	Min. need, 2020- <u>45</u>	Higher job growth, 2020- <u>40</u>	Higher job growth, 2020- <u>45</u>
Extra residents aged 75+	–	7,248	9,291	7,861	10,233
Sheltered housing	125	906	983	1,161	1,279
Enhanced sheltered housing	20	145	157	186	205
Extra care	25	181	197	232	256
Total demand for specialist housing	–	1,232	1,336	1,579	1,740
Average demand per annum	–	62	67	63	70

Source: Edge Analytics; Housing LIN; Turley analysis

- 8.13 As in the HENAU and indeed the original HMA, the above counts individuals who are otherwise assumed to be living in private households, such that they are **included** in any calculated need for dwellings¹⁶². It importantly does not rule out the prospect of the need being even greater if existing older residents are living in unsuitable accommodation and are themselves also in need of this type of housing, even if this is challenging to quantify further.

People with disabilities

- 8.14 The original HNA introduced guidance that continues to feature in the PPG, on how the housing needs of people with disabilities should be assessed¹⁶³.
- 8.15 It confirmed that the Census was identified as one of '*multiple sources of information*' that can be drawn upon¹⁶⁴. While it presented analysis from the 2011 Census, this can now be updated to 2021.
- 8.16 The original HNA reported for instance that around 23% of residents were limited to at least some extent by a long-term illness and/or disability, as of 2011, with just over half (12%) reporting themselves to be limited a lot¹⁶⁵. Both

¹⁶² Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent, paragraph 6.32; Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, paragraph 7.22

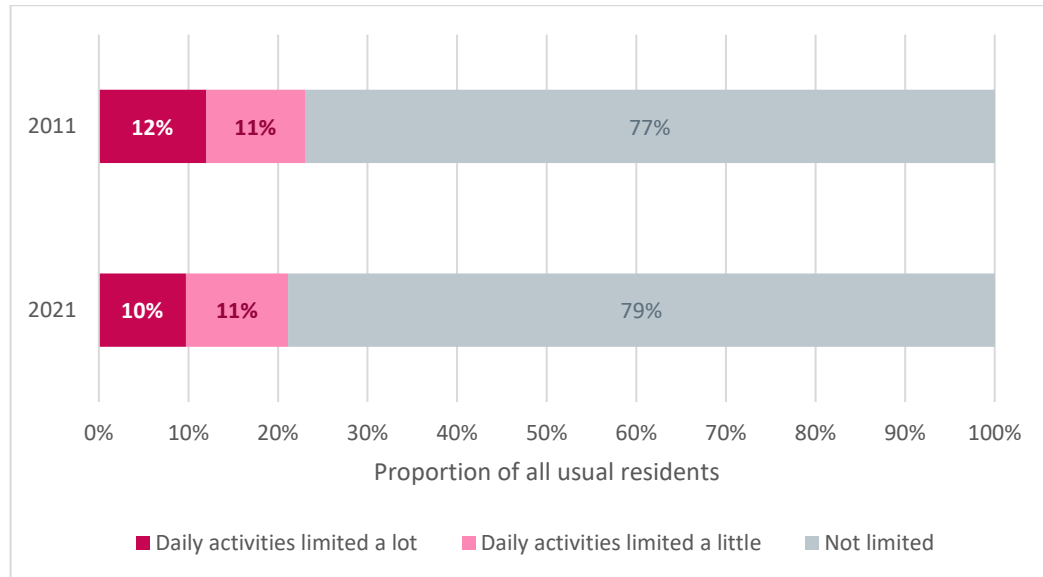
¹⁶³ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, p94-95

¹⁶⁴ PPG Reference ID 63-005-20190626

¹⁶⁵ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, Figure 7.7

of these figures were slightly lower at the 2021 Census, falling to 21% and 10% respectively.

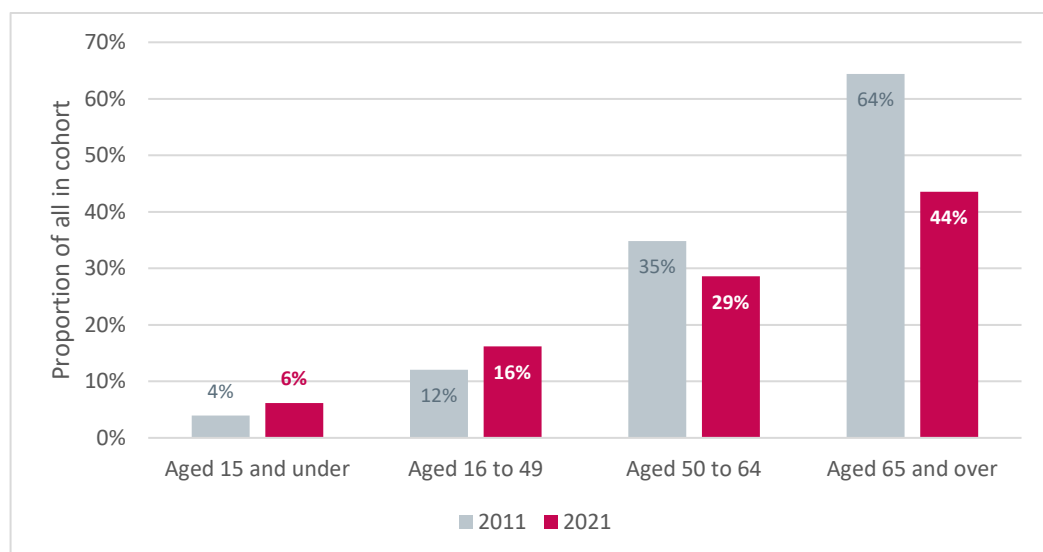
Figure 8.1: Limitation of Daily Activities Amongst Residents of Stoke-on-Trent (2011-21)



Source: Census 2011; Census 2021

- 8.17 This does continue to vary by age, with older people more likely to be limited to some extent in their daily activities, but this is notably becoming true of fewer such individuals aged 50 and over. It is though becoming *more* common, if still much rarer, amongst those under 50.

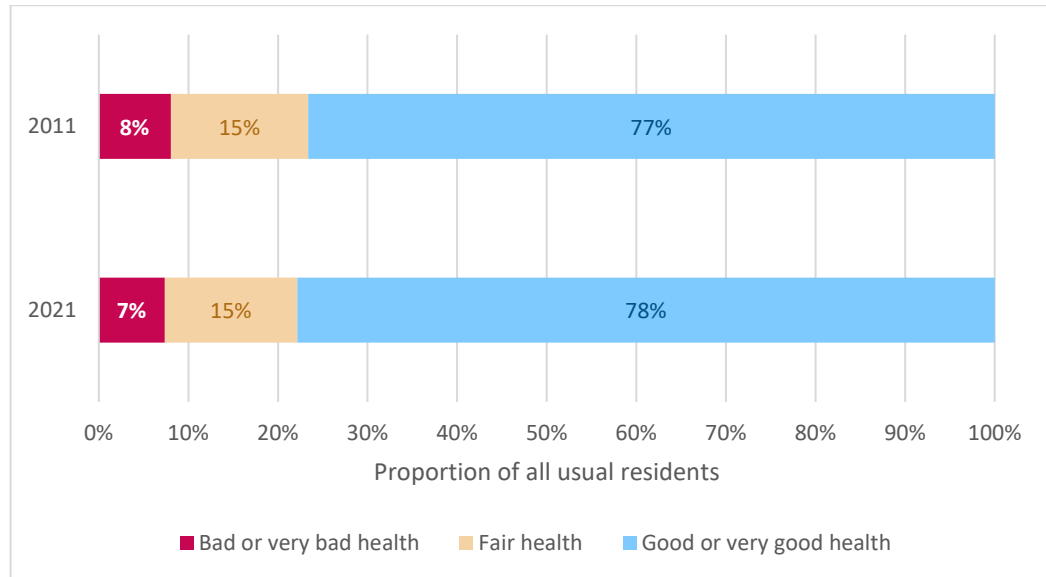
Figure 8.2: Limitation of Daily Activities by Age (2011-21)



Source: Census 2011; Census 2021

- 8.18 Individuals responding to the Census also continue to self-report on their general health, with this similarly showing a slight fall in the proportion describing themselves as in bad or very bad health.

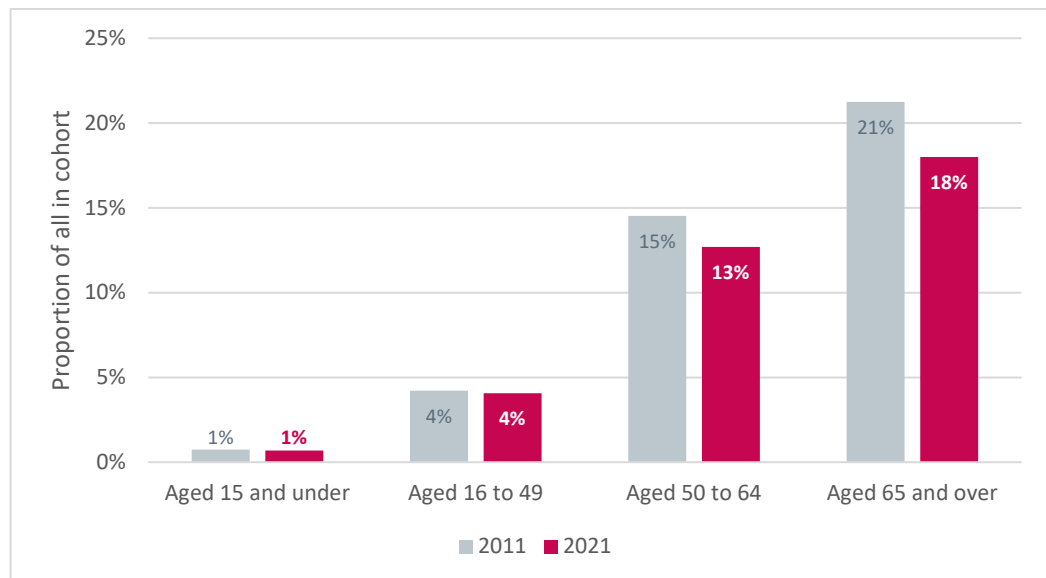
Figure 8.3: Self-Reported General Health (2011-21)



Source: Census 2011; Census 2021

- 8.19 This also varies by age, albeit here there has been a less pronounced improvement amongst older people, and less of a worsening amongst those under 50 years old.

Figure 8.4: Residents in Bad or Very Bad Health by Age (2011-21)



Source: Census 2011; Census 2021

- 8.20 The PPG continues to state that data sources like the Census ‘*can provide an indication of the number of disabled people*’ but it also emphasises that ‘*not all of the people included within these counts will require adaptations in the home*’¹⁶⁶. Some are definitively known to have not even been living in private homes, as there were reported to have been circa 1,814 people living in medical and care establishments as of the 2021 Census. This is around 4% fewer than were doing likewise a decade earlier, albeit within this group it is notable that the number living in a care home without nursing actually increased by some 13%.

Table 8.5: Change in Population of Medical and Care Establishments (2011-21)

	2011	2021	Change
Care home without nursing	891	1,008	+13%
Care home with nursing	772	682	-12%
Other hospital or establishment	59	58	-2%
Local authority setting	103	24	-77%
RSL setting	42	22	-48%
NHS setting	17	11	-35%
Children's home	10	9	-10%
Total	1,894	1,814	-4%

Source: Census 2011; Census 2021

- 8.21 While the age of those residing in such settings is not reported, it is known that around 39% of those living in some form of communal establishment in Stoke-on-Trent as of the 2021 Census were aged 65 or above, with 31% being at least 75 years old.
- 8.22 From a technical perspective, it is important to recognise that the modelling introduced in this report assumes that most people will continue to require private housing, rather than communal accommodation. A fixed number of those aged under 75 are though assumed to require the latter – based on these findings of the 2021 Census – as are a *proportion* of the growing number aged 75 or above. This results in the additional need quantified at the earlier Table 8.3, aside from which there is no implicit need for further specialist accommodation targeted at those aged 74 and under. There are equally no publicly available toolkits that provide alternative means of estimating the demand for such accommodation from people with disabilities.

¹⁶⁶ PPG Reference ID 63-005-20190626

- 8.23 The majority of residents – and by extension those with disabilities – are therefore assumed to carry on living in private dwellings, some of which are likely to require adaptations. Several stakeholders reported a shortage of adapted homes, described as both persistent and growing, so the Council should take this into account as it continues to develop its new Local Plan.

Families with children

- 8.24 Although not explicitly considered by the RMA, the original HNA explored the specific needs of families with children, largely by drawing upon data from the 2011 Census as well as its demographic modelling¹⁶⁷.
- 8.25 The 2021 Census has now confirmed that there was a 6% decline in the number of households with dependent children that were living in Stoke-on-Trent, over the period since 2011. Other types of households have simultaneously grown by 6% such that the proportion of all to contain children has fallen from 41% to 36%.

Table 8.6: Change in Households with Dependent Children (2011-21)

	2011	2021	Change
Households with dependent children	31,265	29,506	-6%
Households without dependent children	76,310	80,894	+6%
All households	107,575	110,400	+3%
% with dependent children	41%	36%	–

Source: Census 2011; Census 2021

- 8.26 The Census does though also record families as well as households, with the number containing dependent children – on this measure – notably reported as having *increased* by around 2%. This suggests that there has been a rise in the number of families that have not formed their own households, living instead with others. These families continue to be mainly led by individuals aged 25 to 49, as was the case in 2011, but there has been a near halving in the number led by someone younger and also a rise in the number led by a person aged 50 and above.

¹⁶⁷ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, p103-105

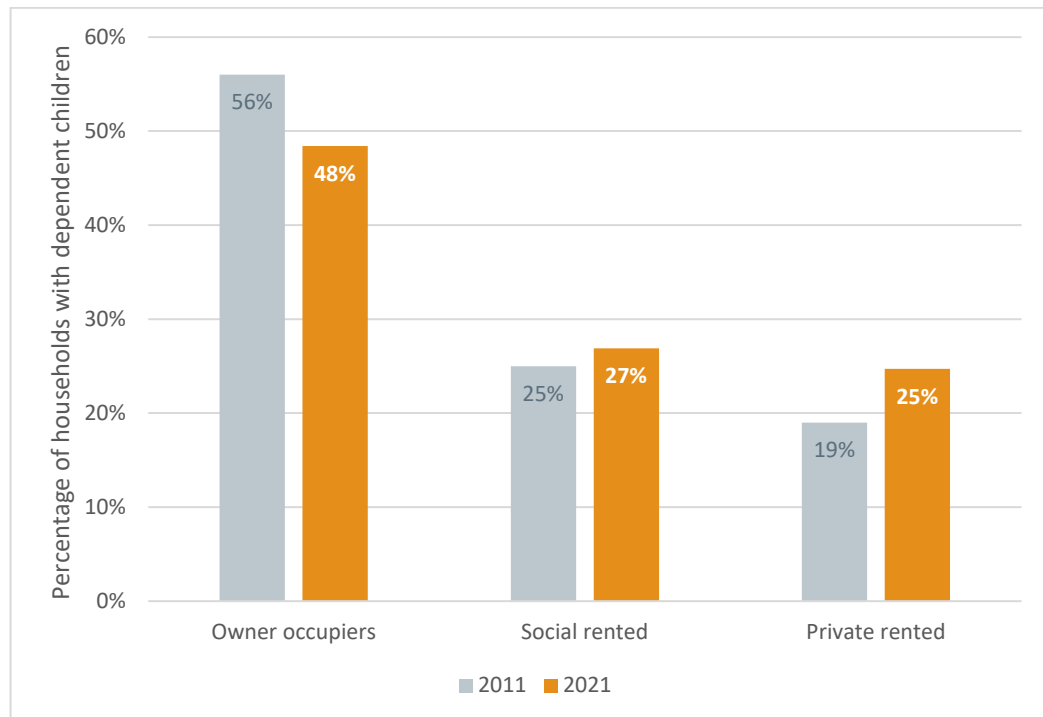
Table 8.7: Change in Families by Age of Reference Person (2011-21)

	24 and under	25 to 49	50 and over	Total
2011	2,377	25,408	3,402	31,187
2021	1,308	26,086	4,563	31,957
Change	-45%	+3%	+34%	+2%

Source: Census 2011; Census 2021

- 8.27 While the living arrangements of such families cannot be investigated further, it can at least be noted that a growing proportion of the *households* with dependent children live in the private rented sector. The original HNA reported that 19% were doing so as of 2011, but this rose to 25% in 2021. While it continues to dominate, the proportion that were owner occupiers has simultaneously fallen from 56% to under half¹⁶⁸ (48%).

Figure 8.5: Tenure of Households with Dependent Children (2011-21)



Source: Census 2011; Census 2021

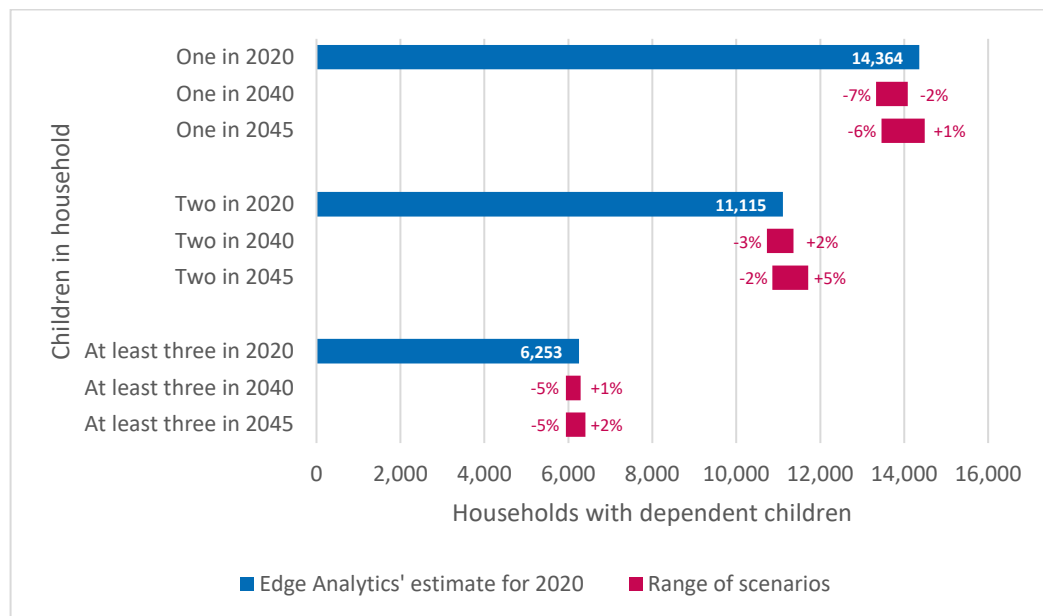
- 8.28 The earlier Figure 6.1 confirmed that homes with three bedrooms continue to be most often occupied by households containing dependent children, as of 2021, albeit this has become slightly less common since 2011 with a growing

¹⁶⁸ *Ibid*, Figure 8.1

proportion choosing larger homes. Around twice as many had only two bedrooms as had at least four, however.

- 8.29 It is these trends that are assumed, in section 6, to be sustained as the household profile changes while either the minimum need for housing is met or a higher level of job growth is supported. It has though already been observed that the former scenario is unlikely to grow the number of households with children, according to the modelling presented at Figure 6.2, while even the latter would only be expected to bring meaningful growth over the extended period to 2045. At least one stakeholder did though express a belief that the demand for family housing would remain strong even as local demographics change.
- 8.30 The further breakdown offered by the modelling confirms that such households would be expected to carry on most often containing only one child, even if this particular group is projected to shrink most in a proportionate sense. It is interestingly only this group that would be expected to reduce in size – at least to 2040 – if the higher level of job growth was to be supported, as the number of households containing multiple children is contrastingly projected to grow. This suggests that it will remain important to make sufficient provision for families, in line with the conclusions of the original HNA¹⁶⁹.

Figure 8.6: Modelled Change in Households with Children (2020-40/45)



Source: Edge Analytics; Turley analysis

¹⁶⁹ *Ibid*, paragraph 8.7

Looked after children

- 8.31 Revisions to the NPPF in December 2024 added ‘*looked after children*’ to the list of groups whose needs should be ‘*assessed and reflected in planning policies*’¹⁷⁰. It confirms, like the version recently subject to consultation, that evidence of such needs ‘*can be found in the relevant local authority’s Children’s Social Care Sufficiency Strategy*’¹⁷¹.
- 8.32 The RMA highlighted this addition and noted that the latest such document for Stoke-on-Trent was produced for the period from 2023 to 2028¹⁷². It is reported as having confirmed that the proportion of children in care was over twice the national average, with the vast majority living with foster parents as opposed to in residential homes or supported accommodation¹⁷³.
- 8.33 The RMA also refers to direct engagement with a relevant stakeholder in the Council’s children’s care services team. This highlighted its prioritisation of foster care and utilisation of Special Guardianship Orders – including funding home extensions – to keep children in familiar environments, allowing residential care to be reserved for complex or permanent safeguarding needs. Securing local accommodation for sibling groups and complex cases was identified as a particular challenge, with high costs and a lack of local residential placements frequently forcing children elsewhere. Funded supported accommodation for 16- and 17-year-olds is reported to be functioning well, with flexible support hours that are enhanced by various initiatives and targeted tenancy projects that are constrained only by a lack of housing stock. The management of care leavers is though reported to be hindered by a shortage of affordable flats with one bedroom, as well as their lacking of tenancy readiness, and this can lead to a reliance on benefit-funded spot purchases and shared housing solutions.

Privately renting households

- 8.34 While again not explicitly considered by the RMA, the original HNA presented analysis of the types of households living in the private rented sector, largely drawing upon the 2011 Census¹⁷⁴.
- 8.35 The 2021 Census has now confirmed that more households are privately renting in Stoke-on-Trent, with the number doing so rising by almost a third (32%) since

¹⁷⁰ MHCLG (December 2024) National Planning Policy Framework, paragraph 63

¹⁷¹ *Ibid*, footnote 26; MHCLG (December 2025) National Planning Policy Framework: draft text for consultation, Policy HO2 paragraph 2f

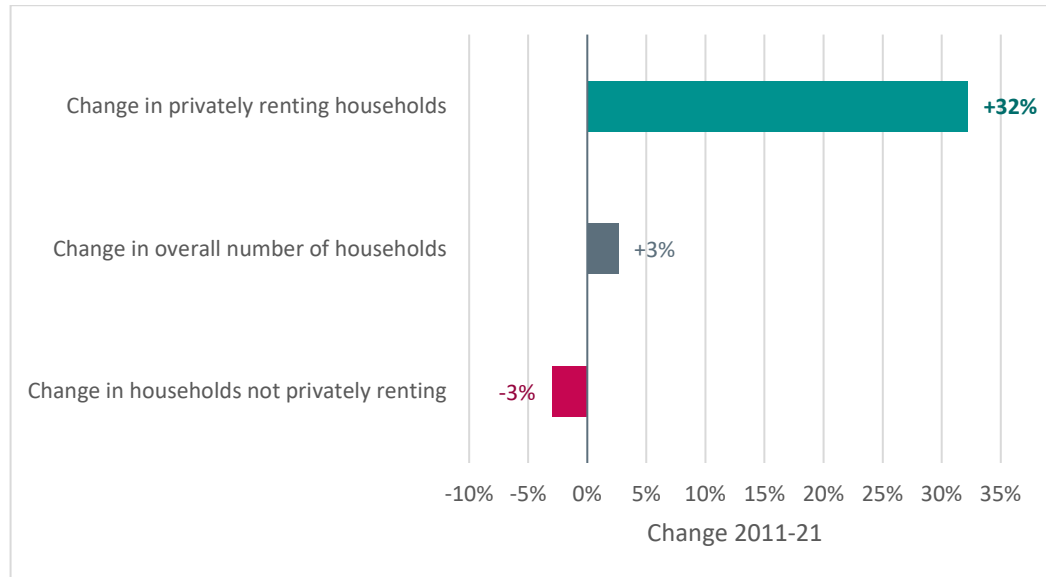
¹⁷² Stoke-on-Trent City Council (September 2023) Sufficiency Needs Assessment and Strategy, September 2023 – March 2028

¹⁷³ ORS (July 2025) Stoke-on-Trent Residential Mix Assessment, paragraph 5.64

¹⁷⁴ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, p105-111

2011. This is around ten times the rate of growth in the overall number of households (3%) with the number opting for other tenures having notably shrunk by around 3%.

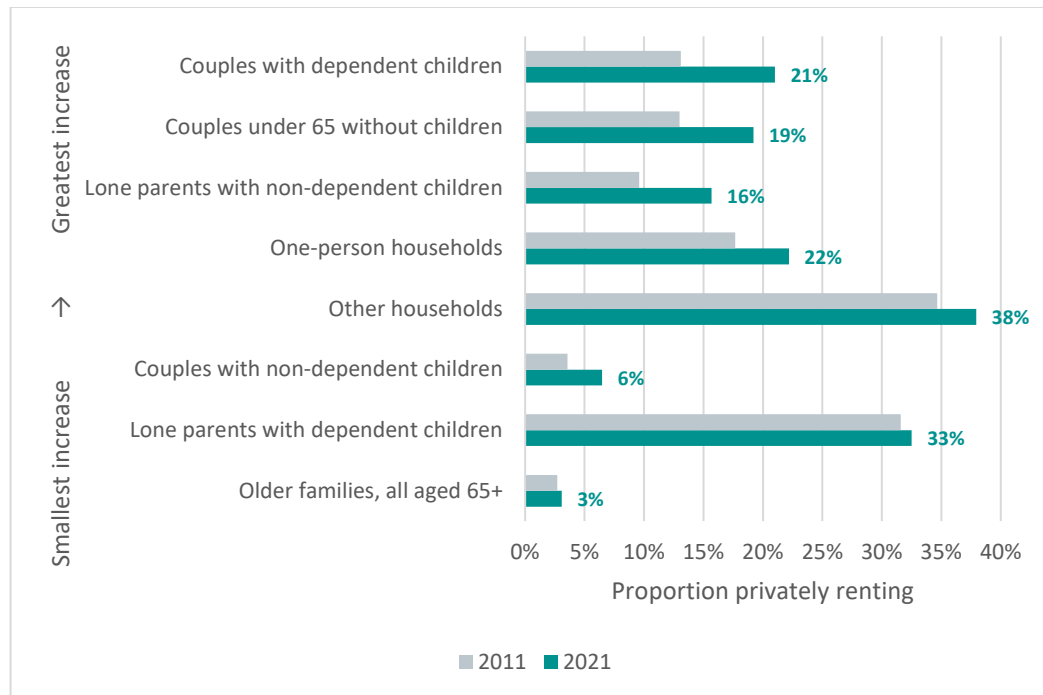
Figure 8.7: Benchmarking Growth of Private Rented Sector (2011-21)



Source: Census 2011; Census 2021

- 8.36 Over a fifth (21%) of all households in Stoke-on-Trent were therefore privately renting as of the 2021 Census, rising from closer to one in six (16%) in 2011. The tendency to rent has likewise increased amongst different types of households, with the sharpest rise seen for couples with dependent children, followed by couples without children and lone parents with non-dependents. It is still though “other households” – who include full-time students and other unrelated sharing adults – that are most inclined to rent, followed by lone parents with dependent children.

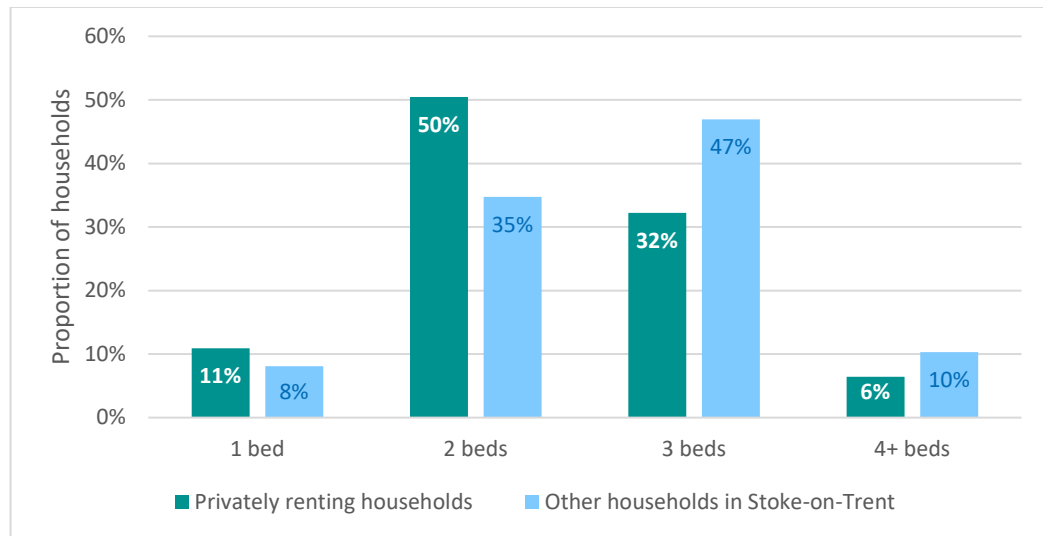
Figure 8.8: Change in Tendency to Privately Rent by Household Type (2011-21)



Source: Census 2011; Census 2021

- 8.37 Privately renting households have also become larger over the decade to the 2021 Census, at that point containing an average of 2.32 people compared to 2.24 in 2011.
- 8.38 Although not reported in 2011, it is known from at least the 2021 Census that privately renting households most often had two bedrooms in their homes, whereas those in other tenures most commonly had three. While 57% of other households had at least three bedrooms, this was true of only 38% of private renters.

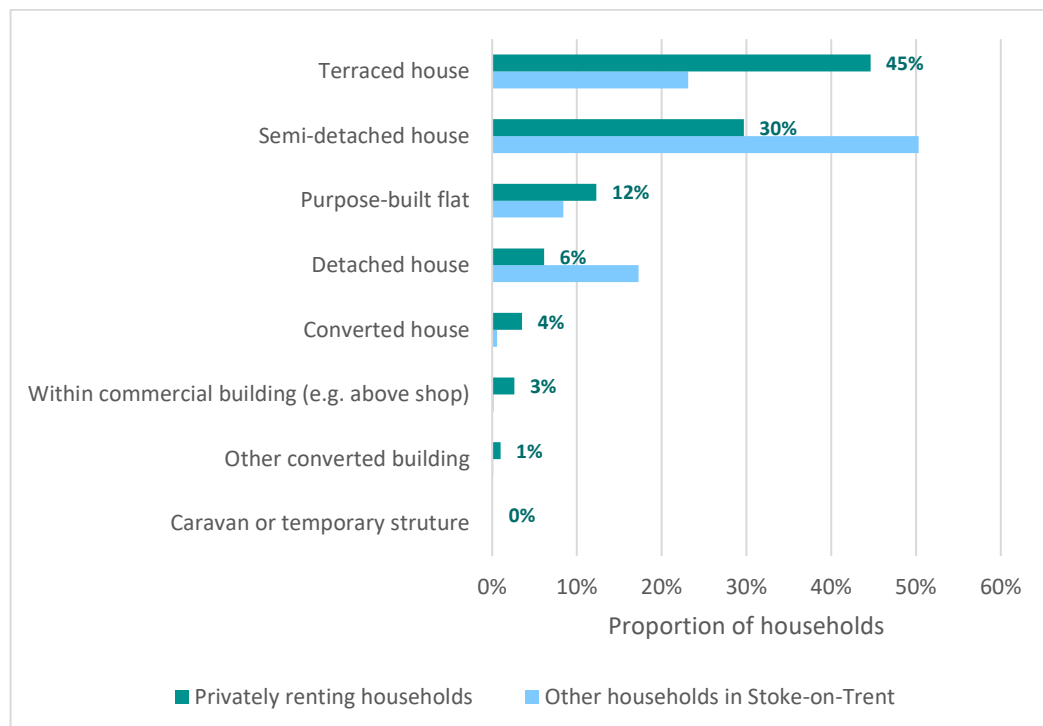
Figure 8.9: Size of Homes Privately Rented in Stoke-on-Trent (2021)



Source: Census 2021

- 8.39 The Census also confirms that private renters are almost twice as likely to be living in terraced houses than those in other tenures. Purpose-built flats and converted houses are also more often occupied, as well as spaces within commercial buildings such as shops. Renters are less likely to be living in semi-detached or particularly detached houses.

Figure 8.10: Type of Homes Privately Rented in Stoke-on-Trent (2021)

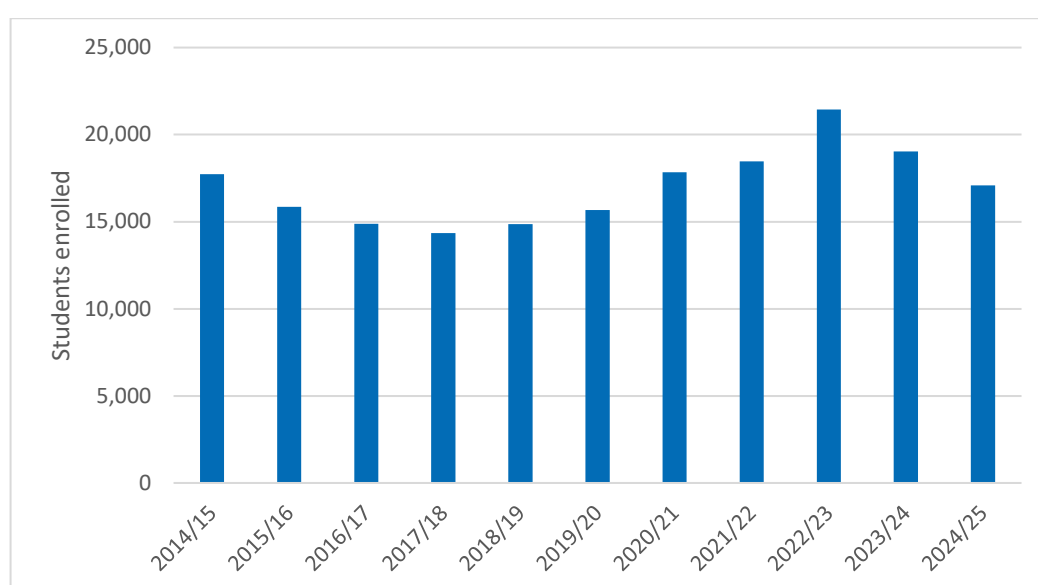


Source: Census 2011; Census 2021

Students

- 8.40 The original HNA noted how student numbers had historically fluctuated at the University of Staffordshire, leading it to consolidate at its Stoke-on-Trent campus in 2016, but the HENAU later observed that numbers were rising at a rate of around 5% per annum over the two years prior to the pandemic¹⁷⁵. The RMA presented further data from the same source, which showed that the average rate of growth more than doubled to 11% per annum over the subsequent three years to 2023, but newly available data confirms that this has reversed at the same rate over the following two¹⁷⁶.

Figure 8.11: Students Enrolled at the University of Staffordshire (2014-25)



Source: HESA

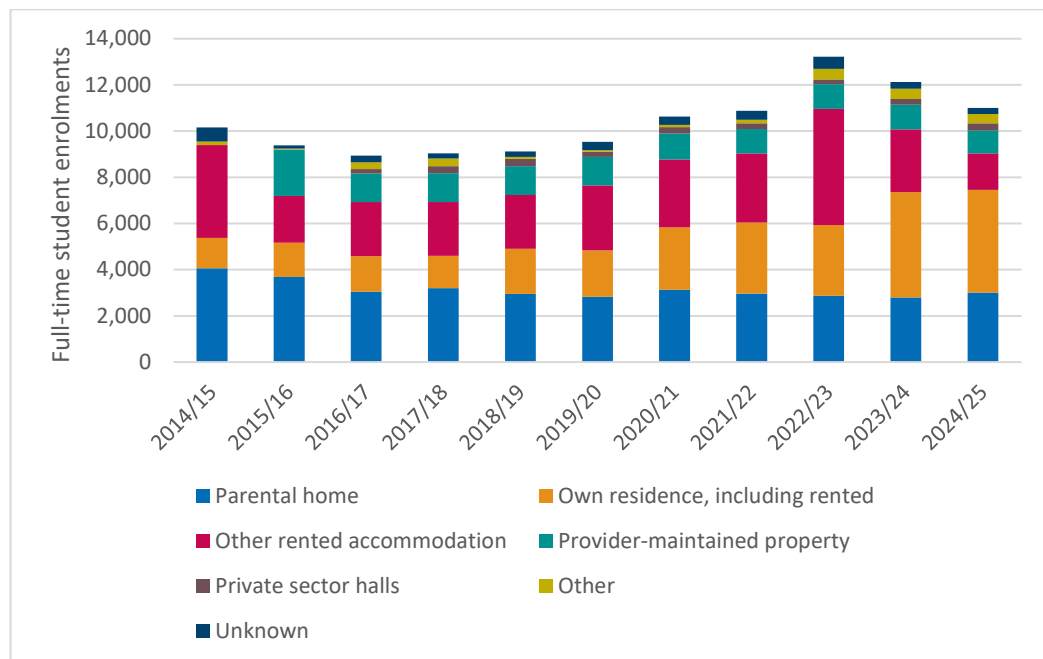
- 8.41 Discussions with the University suggest that this is at least partly due to growing competition, as the recruitment of international students has become harder for all but the most selective higher-tariff institutions, in turn drawing others to universities that may have previously not had spaces. Such dynamics have been observed as having complicated the long-term forecasting of student numbers, with few institutions expecting to significantly grow their intake.
- 8.42 The University noted that it continues to serve as a primary choice for both younger and more mature students from the local area, many of whom prefer to commute from their existing homes. This is supported by further data from the Higher Education Statistics Agency (HESA) which confirms that most full-

¹⁷⁵ Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent, paragraph 6.33; Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, paragraph 8.54

¹⁷⁶ Higher Education Statistics Agency (January 2026) HE student enrolments by HE provider, academic years 2014/15 to 2024/25

time students live either with parents or in their own residencies, as distinct from other forms of rented accommodation or halls. As many as 68% were doing so in the last reported year, rising from 61% in the previous year and from an average of 52% over the nine prior¹⁷⁷.

Figure 8.12: Accommodation of Full-Time Students at the University of Staffordshire (2014-25)



Source: HESA

- 8.43 The University did though consider there to be some demand for purpose-built accommodation in the vicinity, albeit it did not necessarily expect this to grow if student numbers were to rise again. Indeed, the Council's housing team report the market for student accommodation to be weakening, as numbers fall and operators face difficulties filling existing spaces.
- 8.44 The University itself is aiming to expand its overall footprint and is investing in support of this strategic objective, but its plans to deliver 1,000 beds of student accommodation on campus represent a replacement of existing provision rather than an overall increase of its capacity. It is also expected to have a relatively high price point.
- 8.45 As previously noted, the modelling introduced in this report assumes that there will be no change in the number of younger people living in communal establishments, which could include halls of residence that provide '*managed*

¹⁷⁷ Higher Education Statistics Agency (January 2026) Table 57 – Full-time HE student enrolments by HE provider and term-time accommodation 2014/15 to 2024/25

*full-time or part-time supervision of residential accommodation'*¹⁷⁸. Its provision, when not replacing existing spaces, would therefore meet a need that has been assumed to require the provision of dwellings.

Self-builders

- 8.46 The NPPF continues to require local authorities to maintain an understanding of the number of residents wishing to build their own home, and this is not proposed to change¹⁷⁹.
- 8.47 The PPG continues to state that local authorities should '*assess and review the data held*' on their self-build registers as a means of obtaining '*a robust assessment of demand for this type of housing in their area*', as it did when the original HNA was produced¹⁸⁰.
- 8.48 It reported there as being only 182 households enrolled on the Council's self-build register, as of February 2020¹⁸¹.
- 8.49 The Council has confirmed that this has now increased to 253 households, as of January 2026, representing growth of around 39%. Many are reported as having applied in 2021, with over twice as many doing so in that year compared to the average over the prior three, but this has not been sustained and indeed there have been fewer applications in the last three years than in any year since the register was started.

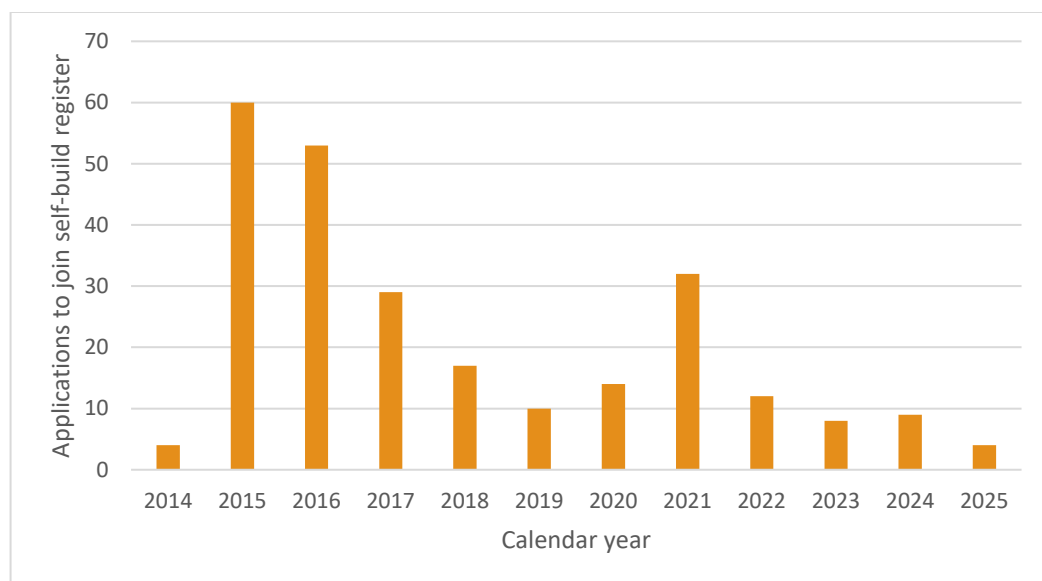
¹⁷⁸ Communal establishment management and type variable: Census 2021 - Office for National Statistics

¹⁷⁹ MHCLG (December 2024) National Planning Policy Framework, paragraph 63; MHCLG (December 2025) National Planning Policy Framework: draft text for consultation, Policy HO1 paragraph 2j

¹⁸⁰ PPG Reference ID 67-003-20190722

¹⁸¹ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, paragraph 8.51

Figure 8.13: Applications to Join Self-Build Register in Stoke-on-Trent



Source: Council records; Turley analysis

- 8.50 At least 43% of the households now on the register have no self-build experience, with at least one in six (17%) saying that they do. This information is not recorded for the residual 40% of applicants.
- 8.51 While a comparable proportion of records are missing (41%) it is known that at least 43% of those on the register are currently owner occupiers, with over half of the residual (9%) living in the private rented sector and seemingly thus seeing self-build as an opportunity to own their own home.
- 8.52 When asked what type of custom build was of interest, being given the option to state more than one, the vast majority of applicants (92%) indicated an interest in individual custom build, with two thirds (64%) giving only this answer. Around one in four (27%) expressed an interest in custom building as a group, albeit this was exclusively favoured by only 3% of households on the register. Slightly more (4%) were interested only in developer-led custom build but this would only be considered by around 23% of all households on the register, suggesting that this is generally the least favoured option.

Table 8.8: Preferred Method of Self-Build

	Amongst preferences	Sole preference
Individual custom build	92%	64%
Group custom build	27%	3%
Developer-led custom build	23%	4%

Source: Council records; Turley analysis

Summary

8.53 With the NPPF continuing to require the housing needs of specific groups to be assessed and reflected in planning policies, this section has shown that:

- The population of **older people** has carried on growing up to 2024, largely driven by those aged 75 and above, with this likely to continue regardless of whether only the minimum need for housing is met or a higher level of job growth is supported. The modelling itself assumes that such growth will generate a need for 26-27 bedspaces in care homes each year, that would be *additional* to the reported need for dwellings, but there could also be further demand for 62-70 units of sheltered or extra care housing that is already included.
- A smaller proportion of residents, particularly those over 50, have limiting **disabilities** with fewer also being in bad health. While there has been growth in the number living in care homes that do not offer nursing, there are generally fewer living in medical and care establishments, which the modelling assumes will not change for all but the oldest residents, such that most will be living in private dwellings that might require adaptation.
- There are increasingly few households with dependent children in Stoke-on-Trent, albeit the number of **families** – reported separately – has actually increased in a sign that not all have formed their own households. Those that did are increasingly living in the private rented sector but continue to most often own their homes, which frequently have three bedrooms but increasingly have more. The modelling only expects the number of such households to grow if a higher level of job growth was supported, and even then only to 2045, but there could be growth in the number of larger families sooner in such a scenario.
- Stoke-on-Trent has a relatively large proportion of **looked after children**, whose needs are primarily met through foster care and adaptations, with there being a shortage of local residential placements and affordable housing for care leavers.
- The number of **privately renting households** has increased by almost a third since 2011, with the tendency to rent rising amongst all types of households. Renting households are becoming larger but continue to most often have two bedrooms, typically in terraced houses.
- The number of **students** enrolled at the University of Staffordshire has recently fallen after a period of growth, largely due to increased competition and new restrictions on international students. It remains a primary choice for both younger and more mature students from the local area, many of whom commute from their existing homes. There is though some demand for purpose-built accommodation, not that this would necessarily be expected to rise if student numbers were to grow again.

- There has been growth in the number of households looking to **build their own homes**, but this has recently been slowing. Applicants tend not to have prior experience of self-build and often already own their own home, but some are notably renting. There is a general preference to build individually but some are also open to group and developer-led options.

9. Need for Employment Land

- 9.1 The original ENA presented estimates of the need for additional employment land in Stoke-on-Trent, which were reviewed in the HENAU to cover an extended period and take new information into account¹⁸². This suggested that at least 85.6ha of employment land could be needed over the period to 2040, rising to circa 118.4ha under a higher job growth scenario and to 281.8ha if recent development trends were to continue. Only this latter scenario would surpass what was then reported to be the supply, with a shortfall of circa 53.1ha.
- 9.2 With take-up having naturally continued, and section 4 reconsidering economic forecasts to arrive at an updated position on future job growth in Stoke-on-Trent, this section presents an updated calculation of the need for employment land which can be benchmarked against the current supply, introduced at the earlier Table 3.2.

Estimating the future need

- 9.3 The PPG continues to state that authorities will need to use '*a range of data*' to develop '*an idea of future needs*'¹⁸³.
- 9.4 It advocates, amongst other things, '*analysis based on the past take-up of employment land and/or property*'¹⁸⁴. This would traditionally be based – as it was in the HENAU¹⁸⁵ – on the Council's own monitoring of commercial development, introduced at the earlier Figure 3.16. Such an approach can logically estimate need over to the period from 2020 to either 2040 or 2045 by allowing for known development – to 2024 – and then extrapolating the prior trend, from the twelve years monitored (2012-24). Such an approach would suggest that circa 975,251sqm of space is needed between 2020 and 2040, rising to circa 1,221,162sqm over the longer period to 2045. These figures would though increase if losses were to continue at the recent rate – and were largely replaced¹⁸⁶ – and it also remains justified and consistent with best practice to provide choice and flexibility by applying a buffer, equivalent to another five years' development. When making such allowances and also converting into land – by applying the plot ratios used in both the HENAU and

¹⁸² Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, section 8; Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent, section 7

¹⁸³ PPG Reference ID 2a-027-20190220

¹⁸⁴ *Ibid*, Table 7.5

¹⁸⁵ Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent

¹⁸⁶ It has been assumed that the trend seen since 2016 continues, with 75% of lost space replaced

the original ENA¹⁸⁷ – it is estimated that circa 305.4ha of land could be needed between 2020 and 2040, rising to 368.4ha over the period to 2045. The greatest need is in each case for warehousing land, followed by sites suited to industrial use.

Table 9.1: Past Development Scenario

	Office	Industrial	Warehouse	Total
Trend 2012-24	4,767sqm	16,019sqm	28,396sqm	49,182sqm
Completions 2020-24	981sqm	78,041sqm	109,314sqm	188,335sqm
Projection, 2024- 40	76,275sqm	256,303sqm	454,338sqm	786,916sqm
Five-year buffer	23,836sqm	80,095sqm	141,981sqm	245,911sqm
Replaced losses, '24- 40	7,920sqm	40,692sqm	31,944sqm	80,556sqm
Floorspace needed, 2020- 40	109,012sqm	455,131sqm	737,576sqm	1,301,718sqm
Land needed, 2020-40	7.3ha	113.8ha	184.4ha	305.4ha
Projection, 2024- 45	100,111sqm	336,398sqm	596,319sqm	1,032,827sqm
Five-year buffer	23,836sqm	80,095sqm	141,981sqm	245,911sqm
Replaced losses, '24- 45	10,395sqm	53,408sqm	41,927sqm	105,730sqm
Floorspace needed, 2020- 45	135,322sqm	547,942sqm	889,539sqm	1,572,803sqm
Land needed, 2020-45	9.0ha	137.0ha	222.4ha	368.4ha

Source: Council monitoring; Turley analysis

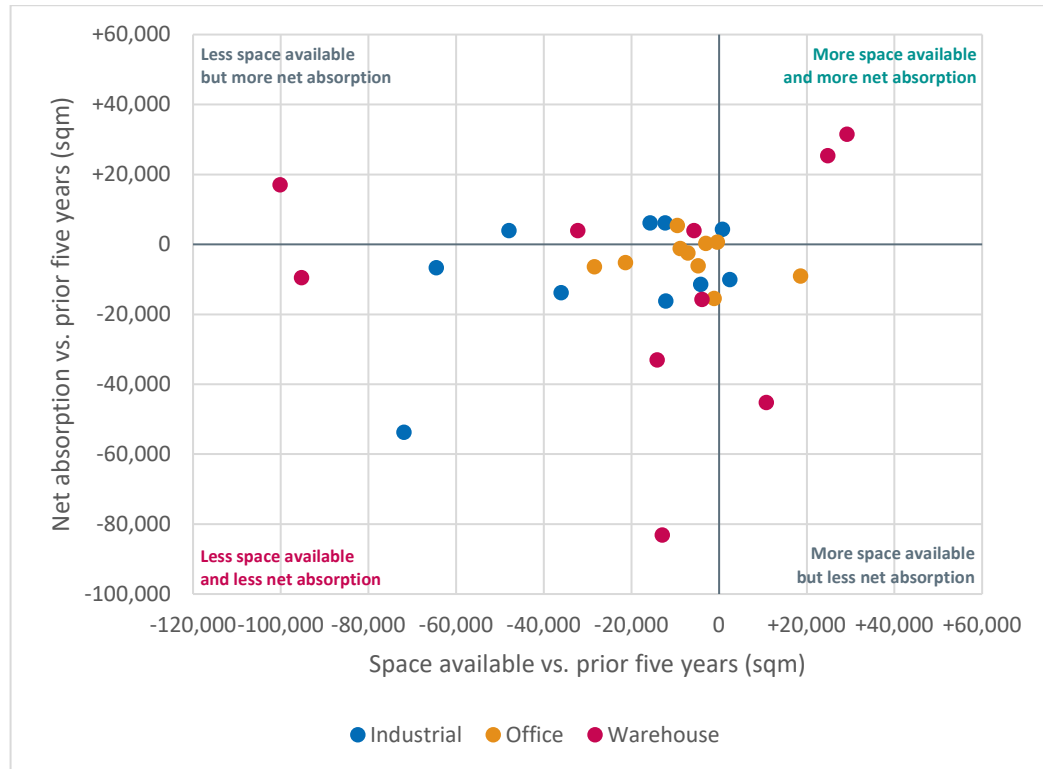
- 9.5 While the above offers an accurate reflection of the development that has recently taken place in Stoke-on-Trent, it will not reflect the full extent of the additional demand for space that has arisen in the past, since many businesses will have occupied existing rather than newly built premises, even if some will have been offset by move-outs. This is though all captured in net absorption data, introduced at the earlier Figure 3.20, and this can therefore reasonably form the basis for a further scenario that extrapolates the '*past take-up of...property*' as is encouraged by the PPG¹⁸⁸.
- 9.6 Any such scenario must though allow for the prospect of demand having been historically suppressed by the limited availability highlighted at Figure 3.21. Indeed, further analysis reveals that net absorption has often – though has not

¹⁸⁷ *Ibid*, paragraph 7.13; Turley (June 2020) Economic Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, paragraph 8.54 – 8.55

¹⁸⁸ PPG Reference ID 2a-027-20190220

always – been lower in those years of the last decade that began with a relatively small amount of space being available, in each case relative to the prior five years.

Figure 9.1: Exploring Effect of Low Availability on Net Absorption (2016-25)

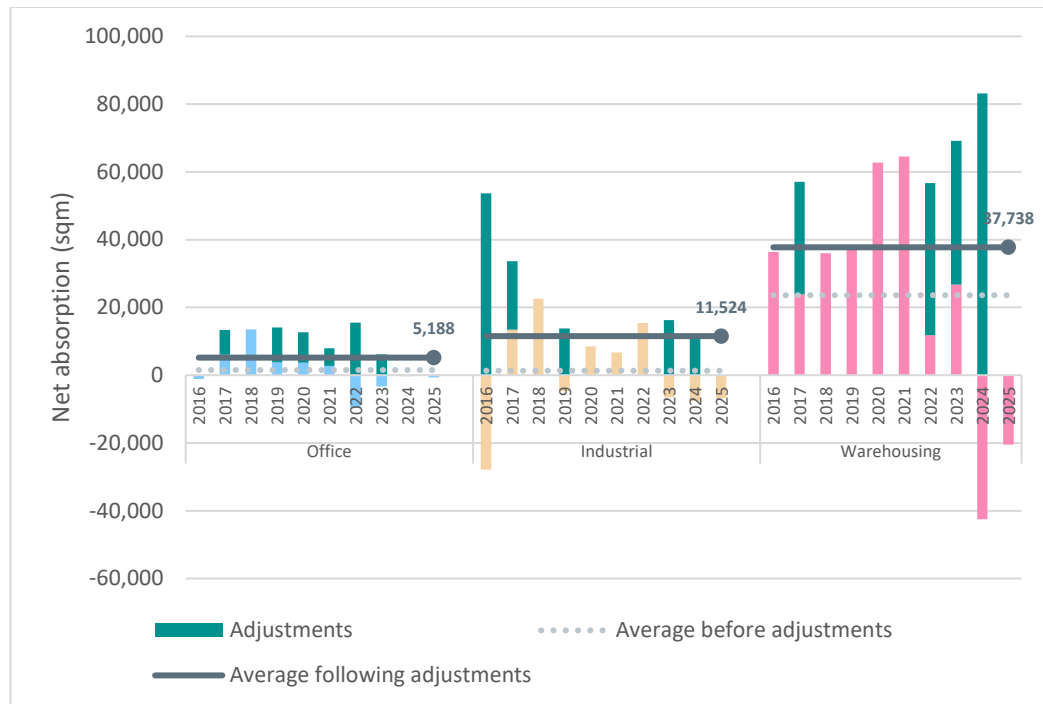


Source: CoStar; Turley analysis

- 9.7 Allowance can be made for demand that has been suppressed by limited availability, with the British Property Federation¹⁸⁹ (BPF) amongst those encouraging consideration of what has become known as “suppressed demand”. This has been done, in this instance, by reverting to the prior five-year trend whenever net absorption has been lower and the year began with less space than had typically been available, again compared to the previous five years. This effectively uplifts net absorption in the years that lie within the lower-left quadrant of the chart above, increasing the annual averages that would have been calculated for offices, industrial premises and warehouses over the last decade as can be seen from Figure 9.2.

¹⁸⁹ Savills on behalf of the BPF (2022) Levelling Up – The Logic of Logistics

Figure 9.2: Impact of Allowing for Suppressed Demand (2016-25)



Source: CoStar; Turley analysis

- 9.8 Allowing for such levels of net additional demand over a 20-year plan period – again with a five-year buffer – could require the provision of some 316.5ha of employment land in total, when applying the same plot ratios as above. This rises to circa 379.8ha over a 25-year period, to 2045. Both are again underpinned by a particular need for warehousing land.

Table 9.2: Past Demand Scenario

	Office	Industrial	Warehouse	Total
Unadjusted past demand	1,492sqm	1,331sqm	23,602sqm	26,425sqm
Adjusted past demand	5,188sqm	11,524sqm	37,738sqm	54,450sqm
Projected over 20+5 years	129,691sqm	288,106sqm	943,446sqm	1,361,244sqm
Land needed, 2020-40	8.6ha	72.0ha	235.9ha	316.5ha
Projected over 25+5 years	155,630sqm	345,727sqm	1,132,135sqm	1,633,492sqm
Land needed, 2020-45	10.4ha	86.4ha	283.0ha	379.8ha

Source: CoStar; Turley analysis

- 9.9 Each of the above scenarios, based on past take-up, suggest a greater need than is implied by simply converting employment forecasts – introduced in section 4 – into land through the process that was outlined in both the original

ENA and the HENAU. Table 9.3 outlines – and **Appendix 2** further explains – how this would now suggest a need for up to 145.5ha of land over the period to 2040, rising to 161.8ha over the period to 2045. The PPG does still refer to such ‘labour demand’ scenarios, based on ‘sectoral and employment forecasts’, and it accepts that they too can provide ‘an idea of future needs’¹⁹⁰. It also refers to ‘demographically derived assessments of current and future local labour supply’ that can in this case be tied to the outcome of the standard method, albeit this does here suggest only a slightly greater need than the baseline forecast as is further explained in **Appendix 2**.

Table 9.3: Labour Supply and Demand Scenarios

	Experian baseline, 2020- 40	Experian baseline, 2020- 45	Labour supply, 2020- 40	Labour supply, 2020- 45	Higher growth, 2020- 40	Higher growth, 2020- 45
Office	5.6ha	6.2ha	6.1ha	6.7ha	8.0ha	9.4ha
Industrial	14.6ha	10.6ha	14.6ha	10.6ha	32.7ha	32.7ha
Warehouse	66.1ha	67.4ha	69.7ha	70.5ha	104.8ha	119.7ha
Total	86.4ha	84.2ha	90.4ha	87.8ha	145.5ha	161.8ha

Source: Turley analysis

Reconsidering the balance between supply and demand

- 9.10 The above estimates of need – covering the period from 2020 onwards – can be benchmarked against the supply of circa 122.4ha that was introduced at the earlier Table 3.2, albeit with the latter being based to April 2025 the development of an estimated 42.0ha of land over the intervening five years can also be taken into account¹⁹¹.
- 9.11 This suggests that there could be a surplus of employment land based on the lower estimates of need, introduced at Table 9.3. This would though transform into a shortfall, of around 141-152ha to 2040 – or 204-215ha by 2045 – based on the upper estimates that respectively extrapolate past development and demand.

¹⁹⁰ PPG Reference ID 2a-027-20190220

¹⁹¹ This incorporates net completions to 2024 – consistent with the *gross* estimates presented at Figure 3.16 – but also accounts for the intervening year (2024/25) that became available late in the reporting process. While the Council reports completions on the basis of floorspace, this has been converted into land by applying the plot ratios used earlier in this section

Table 9.4: Establishing the Supply-Demand Balance

	Supply	Need 2020- <u>40</u>	Surplus/ shortfall	Need 2020- <u>45</u>	Surplus/ shortfall
Experian baseline	164.4	86.4	+78.1	84.2	+80.2
Labour supply	164.4	90.4	+74.0	87.8	+76.6
Higher growth	164.4	145.5	+18.9	161.8	+2.6
Past development	164.4	305.4	-141.0	368.4	-204.0
Past demand	164.4	316.5	-152.1	379.8	-215.4

Source: Turley analysis

- 9.12 With the earlier Table 3.3 having introduced the views of Aspinall Verdi on the type of development that individual sites within the supply could accommodate – and recent completions similarly broken down by the Council – it is possible to also evaluate the balance for different types of employment land.
- 9.13 Table 9.5 overleaf shows that the most pronounced shortfall would be for industrial and warehousing land, under the scenarios that extrapolate past development and demand. While there is also implied to be a shortfall of land suited to offices, across all five scenarios, this could be resolved through the separate supply of sites suited to a mix of uses, if they are attractive to the market. Any residual shortfall could likely be addressed through the redevelopment and regeneration of central areas.

Table 9.5: Supply-Demand Balance by Type of Employment Land

	Completions plus supply	Experian baseline	Labour supply	Higher growth	Past development	Past demand
2020-40						
Office	3.2	-2.4	-2.9	-4.8	-4.1	-5.4
Industrial and warehousing*	153.5	+72.8	+69.3	+16.0	-144.7	-154.4
Mixed use or other	7.7	–	–	–	–	–
2020-45						
Office	3.2	-3.0	-3.5	-6.2	-5.8	-7.2
Industrial and warehousing*	153.5	+75.5	+72.5	+1.1	-205.9	-215.9
Mixed use or other	7.7	–	–	–	–	–

Source: Aspinall Verdi; Turley analysis

* includes R&D and light industrial

Assessing the quality of the employment land supply

- 9.14 While the above represents a simple comparison between the total supply and the calculated need, it is important to also consider the quality of the sites that form part of the supply.
- 9.15 As in the original ENA, all of these sites – introduced at the earlier Table 3.2 and discussed in more detail at **Appendix 3** – have been inspected by Aspinall Verdi and assessed through a scoring framework, based on criteria agreed with the Council but applying some professional judgement to reflect their individual characteristics. Each site has again been scored against 12 indicators, grouped into the following:
- **Market signals** – this considers the scale of the development opportunity, evidence of current market appeal to national and international companies or perceived future appeal to such occupiers, the potential for a clustering effect (or existing evidence thereof) and an indicator of current demand with regards occupancy levels or perceived market demand judged by Aspinall Verdi;
 - **Physical signals** – this considers the prominence of the site based on its accessibility via the road network, as well as the existing condition and quality of the site / buildings taking into account the age of development and the condition of premises or ground conditions as appropriate.

Consideration was also given to the quality of the external environment of the site with regards its setting; and

- **Sustainability signals** – this considers the site’s strategic access as judged by its proximity to a strategic road junction and/or more local road junction and the nature of access accounting for congestion. Consideration is also given to walkability to public transport and services, the proximity to urban areas and access to labour and services.

- 9.16 While sites were scored on the basis of the Council’s framework, with some professional judgement in the process to reflect specific site characteristics, Aspinall Verdi have also provided a more qualitative assessment of their suitability for employment use. This has drawn upon the input information, their market knowledge, compliance with the NPPF and additional qualitative information, some gathered through site visits.
- 9.17 Sites have been categorised, as previously, as ‘very good’, ‘good’, ‘average’, ‘poor’ or ‘very poor’¹⁹². This is again intended to provide a broad indication of the overall quality of employment land supply, rather than comparing sites against each other.
- 9.18 Greater weight has been given to sites which are considered to respond positively to market needs and where it is understood that existing constraints can be more readily overcome. Sites understood to face significant impediments to development – such as contamination, or a specific policy designation¹⁹³ – have been downgraded. This is because the assessment takes a ‘policy-on’ perspective of the current employment sites, assessing sites as they would be considered for a planning application for their (re)development if one was to come forward today, albeit with this assessment necessarily made at a strategic level. If any site constraints were to be removed in the future, including policy constraints, the scoring of a site would likely improve.
- 9.19 In broad terms, the scoring process enables the quantification of the supply of:
- **Very good or good sites**, of high quality, which should therefore be retained and protected;
 - **Average sites** which play an adequate employment function and should be retained and monitored; and

¹⁹² While such categorisation of sites has ultimately been a judgement by Aspinall Verdi, they have broadly aligned with the scoring of sites where those scoring 45+ were ‘very good’; 34 – 44 ‘good’; 25 – 33 ‘average’; 21 – 25 ‘poor’; and 20 and below ‘very poor’

¹⁹³ The Council has confirmed that none of the sites included in the current supply are in the Green Belt, although Aspinall Verdi have also applied the scoring criteria to the future sites of which some are

- **Poor or very poor sites**, of lower quality, including those where employment uses are likely to no longer represent an efficient use of land and where reallocation or removal from the supply could be considered.

9.20 It is important to acknowledge that the assessment is based on a consideration of current conditions and the intrinsic qualities of each site. The scoring of sites would be subject to change in the future reflecting the evolution of the market and/or other factors. It should also be noted that scoring of the sites is not intended to represent a Sustainability Appraisal, and also that no detailed viability work has been undertaken to inform the assessment.

9.21 Table 9.6 confirms that all but three of the 35 sites assessed through this process have been classed as at least ‘average’, with 11 – offering almost 43ha combined – classed as ‘good’ or ‘very good’.

Table 9.6: Assessed Quality of Sites in the Supply

Classification	Number of sites	Developable area (ha)
Very good	4	10.1
Good	7	32.6
Average	21	78.6
Poor	2	1.0
Very poor	1	0.0
Total	35	122.4

Source: Aspinall Verdi

9.22 Notwithstanding, it is apparent that around two thirds of the land offered by the available sites is classed as no better than average. With a quantitative shortfall having already been identified in two of the five scenarios, themselves considered to be more representative of future needs – where they reflect historic evidence of delivery and, in the case of the uppermost, the potential implications of suppressed demand – the modest supply of quality land represents a potential risk in attracting business investment and sustaining local economic growth.

9.23 This continues to reflect a similar conclusion reached in the HENAU, particularly in the context of a consideration of the requirements for different types of premises. Consideration is given to this in more detail in the following section.

Meeting the needs of the modern economy

9.24 The NPPF includes a requirement to plan for development that meet the needs of a ‘modern economy’. It states that planning policies should:

“...pay particular regard to facilitating development to meet the needs of a modern economy, including by identifying suitable locations for uses such as laboratories, gigafactories, data centres, digital infrastructure, freight and logistics”¹⁹⁴

- 9.25 Consideration is therefore given below to those sectors of the modern economy which are of most relevance to Stoke-on-Trent. This accounts for the review of the Council’s economic strategies as well as the work undertaken to forecast future employment growth. Although specific sectors are discussed, this is not intended to preclude the potential advancement of other parts of the modern economy in Stoke-on-Trent and it will be important for the Council to monitor its local economy to understand other investment interest and opportunities and consider its supply of employment land to accommodate emerging needs.

Advanced manufacturing

- 9.26 The analysis in the preceding sections has highlighted the ongoing significance of the manufacturing sector to Stoke-on-Trent’s economy. Where the sector has faced challenges and seen the total number of jobs reduced, there is a documented commitment within local economic strategies to supporting business investment and retaining and attracting higher value employment opportunities. As referenced in section 4, the EDS describes Stoke-on-Trent as being *‘at the heart of the UK’s largest advanced manufacturing cluster’* which is *‘particularly strong in ceramics, materials and metals’¹⁹⁵*. It is noted as being home to *‘one of the most successful and rapidly growing enterprise zones anywhere in the UK’*, in Ceramic Valley, which is observed as having driven *‘the development of affordable and accessible commercial and employment space’*, with the city’s share of its sites – the others being in Newcastle-under-Lyme – reported to be either *‘occupied, being developed or in the planning process’¹⁹⁶*.
- 9.27 The success of advanced manufacturing was factored into the proposed adjustment to potential future job prospects for the sector within the presented economic forecasts in section 4.
- 9.28 With regards to their market view, Aspinall Verdi consider that the demand for industrial floorspace in Stoke-on-Trent continues to remain resilient, underpinned by continued occupier demand for both modern manufacturing premises and established industrial estates.
- 9.29 The analysis of changing commercial floorspace in section 3 revealed a notable increase in the amount of industrial floorspace, with Figure 3.18 showing a re-orientation of space across the city such that it has become the most significant in scale. Within the same section it was also noted that there have been some

¹⁹⁴ MHCLG (December 2024) National Planning Policy Framework, paragraph 86c

¹⁹⁵ *Ibid*, p4

¹⁹⁶ Stoke-on-Trent City Council (December 2024) Economic Development Strategy 2024-28

losses of industrial space, likely at least partly reflecting the evolving requirements of occupiers of manufacturing and wider industrial floorspace.

- 9.30 Similarly, noting comparatively low availability rates of industrial space documented in section 3, it will be important that the Council continues to assess the extent to which the land and premises available allow for the continued development of new manufacturing floorspace. The site assessment has identified few that are high-scoring and capable of meeting the needs of modern manufacturers, and Aspinall Verdi have acknowledged that market delivery constraints persist on those sites yet to have been delivered. It will therefore be important for the Council to consider opportunities to identify additional sites that can meet occupier needs, in terms of their location and the types of space required.
- 9.31 Particular consideration will need to be given to opportunities to accommodate a blending of floorspaces where it is recognised that the advanced manufacturing sector requires facilities which can accommodate R&D and laboratory space as well as more traditional industrial units. Opportunities to facilitate agglomeration of businesses is an important consideration as is the proximity and accessibility to appropriate academic institutions within the area, where there are important relationships in encouraging start-up and expansion floorspace.
- 9.32 Where appropriate this could include the identification of sites able to accommodate a campus style development, integrating industrial manufacturing space along with office-based flexible workspaces in a high-quality environment that would be attractive to new business investment as well as providing grow on space for existing businesses in Stoke-on-Trent.

Logistics

- 9.33 The growing demand for logistics floorspace has been well-documented and has manifested physically across England in the growth of large-scale logistic hubs along the strategic road network. In the context of the modern economy, it is understood that the Government sees a continued and evolving demand for warehouses which increasingly integrate advanced robotics and AI.
- 9.34 The original ENA considered in some detail the logistics sector in the context of the potential need for strategic employment sites across Stoke-on-Trent and Newcastle-under-Lyme. This included reference to sub-regional strategic work in the form of the West Midlands Employment Sites Study (2015). A more recent iteration of this study was published in 2024¹⁹⁷.
- 9.35 This study evidently extends across a much larger geography, noting that it covers a large part of the West Midlands (noting South Worcestershire, Herefordshire, Shropshire and Telford and Wrekin fell outside of the study area

¹⁹⁷ West Midlands Strategic Employment Sites Study 2023/24: Final Report (2024)
Mace Ltd with Iceni Project Ltd, Knight Frank and MDS Transmodal

for demand and supply). It is though pertinent to observe that in reviewing market evidence it concludes that there is a strong need for additional investment sites to be brought forward across this area to support growth. At Table 1.1 of the study a shortfall of land to accommodate so-called 'strategic needs' is identified of between 615 and 977 ha. It proceeds to estimate that around 30% of land supply will be required by manufacturing and 70% by logistics.

- 9.36 The latest study defines nine road based 'Opportunity Areas', one of which is located along the northern part of the M6 and includes Stoke-on-Trent and Stafford (labelled Area 1). These are introduced as '*optimum locations*' for future (road based) strategic employment sites.

- 9.37 In describing Area 1 the Study states the following:

*"This is a strong market sitting equidistant between Manchester & Birmingham on the M6 corridor and is well established in the big box market. The market has seen a significant amount of take up on sites in recent years and there is currently a scarcity of pipeline sites in the market. St Modwen Park Stoke Central has been particularly active and St Modwen Park Meaford forms a major part of supply"*¹⁹⁸

- 9.38 In comparing the market strength of the different Opportunity Areas, Area 1 is assigned a market rank of 'B' which means it is not considered to have the highest rank of market strength, with these areas primarily ringed around Birmingham. The potential need for two strategic sites to accommodate B8/mixed uses, albeit with the phasing of these noted as being required later in the study period in the context of current identified supply. It also identifies a potential need for up to one strategic site to accommodate E(g)/B2 uses, with this affirming the analysis above which highlights the potential demand from more traditional industrial or manufacturing businesses. It is separately noted that the study also identifies Stoke-Stafford as one of four broad areas of search where it may be appropriate to provide for rail-based requirements of the sector over the long term.
- 9.39 As with the advanced manufacturing sector, at a local level the forecasts introduced in section 4 of this report make positive adjustments for the transport and storage sector in the presented forecasts. This served to increase the forecast need for warehousing space, with this also reflected in an identified significant need for floorspace within the past take-up scenarios reflecting the recent demand for such space.
- 9.40 This is validated by Aspinall Verdi's market view that demand remains strong for logistics floorspace in Stoke-on-Trent, noting that this is driven by relative affordability when compared to most locations in the West Midlands. They observe that the final phase of Indurent's Stoke Central development at Etruria

¹⁹⁸ *Ibid*, paragraph 12.26

Valley is progressing following the successful delivery of almost 500,000 sqft of industrial and logistics accommodation in previous phases. The decision to proceed with a further 70,000 sqft of multi-let industrial space reflects developer confidence in the depth of occupier demand and the performance of earlier phases¹⁹⁹.

- 9.41 The analysis of existing supply, considered in **Appendix 3**, reveals that the trend recognised within the HENAU of strong take-up of land close to the A500 has been sustained with continued take-up in recent years. The result is an increasingly limited number of larger sites which are also close to and accessible from the motorway network. Indeed, in reviewing the change in employment sites it is noted that the higher scoring sites – such as Etruria Valley – have very limited supply remaining and Trentham has built out. Land remains at Chatterley Valley, and Aspinall Verdi have outlined the recent planning approval for nearly 780,000 sqft of warehouse accommodation as illustrating demand, albeit they separately observed that potential deliverability challenges could impact on the comparative market appeal and timescales for delivery.
- 9.42 Where the aforementioned subregional study distinguished ‘strategic’ needs, it identified that such sites would be required to be 25ha or larger. It is of note that none of the sites considered by Aspinall Verdi are of this scale. The largest is Fenton Quarry (S28) which is just in excess of 15ha.
- 9.43 It is recommended, in this context, that the Council considers the opportunity to identify new sites which can respond to the strong demand from this sector within the local economy. It is noted that the requirements of this sector are broad and not limited to large footprints and it is therefore important that sufficient choice and flexibility is also ensured for the full range of operator requirements.
- 9.44 It is appreciated in considering the potential to identify new land that can accommodate future logistics occupiers that the Council will need to collaborate with Newcastle-under-Lyme, where its own emerging Local Plan identifies a strategic scale employment site which is intended to accommodate larger format buildings (as part of a potential mix). This recognises the important functional relationships between the two authorities as reconsidered in section 2 of this report.

Data centres / digital infrastructure / giga factories

- 9.45 It is acknowledged that this is a rapidly evolving sector of the economy and therefore the demand and requirements of the sector will continue to evolve.
- 9.46 It is understood that Stoke-on-Trent is not currently home to any data centres²⁰⁰, albeit an application is believed to have been submitted for a facility

¹⁹⁹ Mounsey Chartered Surveyors Instructed on Final Phase of Indurent’s Stoke Central Scheme - Mounsey Chartered Surveyors

²⁰⁰ United Kingdom Data Centers - Providers Map in United Kingdom

within Spode Works. This suggests there is potential demand for facilities, particularly so called ‘edge’ facilities that are ‘located close to the end users to minimise latency’, which observers expect to become more important with the adoption of AI²⁰¹.

- 9.47 This also aligns with research published by the Productivity Institute and Staffordshire University titled ‘*Digital Stoke*’: a new opportunity for a second-order post-industrial city²⁰² (2025). This identified a growing digital sector in Stoke-on-Trent and, more widely, in North Staffordshire. This advocates for policy to support the inclusive development of this growing sector, ensuring that there is a business-friendly culture and streamlined investment procedures.
- 9.48 It is recommended that the Council continues to appraise specific land and floorspace requirements arising from the growth of this sector, recognising specific locational expectations and potential agglomeration benefits.
- 9.49 Gigafactories represent a distinct property typology within this broad sector. It is important to note that there is only one currently operational throughout the entirety of England in Sunderland. There are three further gigafactories known to be in the pipeline, these being located in Sunderland (a second battery plant adjacent to the existing facility), Somerset (Agratas are under construction with a 40 GWh gigafactory) and Coventry (planning permission secured for the West Midlands Gigafactory)²⁰³. The demand for gigafactories has often been aligned with the acceleration of the electrification of transport, with this representing an important determining factor behind this pipeline of schemes. Moving forward and recognising the wider application of related technologies and growing demand it is reasonable to assume that proximity to the automotive industry may not be an exclusive locational requirement. This recognises relationships to the renewables sector as well as potentially data centres. At this point in time, however, there is no specific locational demand identified as driving a requirement for such a facility in Stoke-on-Trent. That is not to preclude a future need being identified.

A changing office market

- 9.50 The original HNA and subsequent HENAU recognised the evolving requirements of the office market, and it has been widely reported that the office market across the UK has experienced considerable change over recent years. The evolution of workspace strategies of businesses is being shaped by the

²⁰¹ House of Commons Library (August 2025) Data centres: planning policy, sustainability, and resilience, p10-11

²⁰² ‘*Digital Stoke*’: a new opportunity for a second-order post-industrial city (2025), The Productivity Institute and Staffordshire University

²⁰³ UK electric vehicle and battery production potential to 2040 – Faraday Report UK Gigafactory Outlook 2024

acceleration and sustaining of hybrid-working as well as new disrupters including, but not limited to, the rise of AI.

- 9.51 Where there are important distinctions between the office markets of large cities and economies and smaller towns, such as the main office location within Stoke-on-Trent in Hanley, there are general trends of relevance which include a move away from a desire for rigid office leases and a growing requirement for flexible space that better aligns with workforce requirements²⁰⁴. There has similarly been an elevation in the expectations of businesses and their employees as to the experience that being in the office provides, with this an important consideration in attracting talent and improving productivity in a hybrid working model.
- 9.52 The modelling introduced above indicates a quantitative shortfall of office floorspace over the plan period. In the context of comparatively modest level of demand for office floorspace this primarily reflects a limited supply of land which Aspinall Verdi have specifically identified as being most suited to this type of floorspace. It is noted that where sites classified as potentially suitable for mixed uses, including for example the Central Business District (Smithfield) (S4) and East and West Precincts Hanley (S7) are included there is a more significant potential supply, albeit it is recognised that the employment component of these sites may be under pressure from residential provision.
- 9.53 As part of the research a discussion was held with Genr8 who worked in partnership with the Council in the delivery of Smithfield. This highlighted that where new office floorspace had been delivered the developer had had to orient towards a more residential-led development to respond to market demand factors. It was suggested that whilst the market for office space continues to be relatively modest there was a continued role for the provision of flexible office provision within mixed-use schemes.
- 9.54 This aligns with Aspinall Verdi's market view that the Stoke-on-Trent office market is primarily local in nature, with demand driven by locally based businesses and public sector or local administrative uses, rather than wider regional or national office occupiers. They identify, further to the above, in terms of market activity that a 4,320 sqft office building, Signal Box, is currently under construction and due for completion in 2026, highlighting that selective development activity continues where confidence exists in occupier demand.
- 9.55 It is recommended that the Council continues to monitor demand for land that can accommodate office floorspace in the context of the above, whilst recognising ongoing uncertainties and the market challenges to deliver.

²⁰⁴ A range of publications by leading commercial agents were available at the time of writing document changing requirements and expectations. One such example includes: The Evolving Landscape of the UK Office Market: Navigating a New Era

Summary

- 9.56 The original ENA presented estimates of the need for additional employment land that were later updated in the HENAU, but these were based only on outdated forecasts or past take-up – which has inevitably continued – so it is necessary to revisit these calculations.
- 9.57 The updated forecasts, introduced in section 4, have once again been converted into land and complemented by another scenario that accounts for the labour supply that could result from meeting the minimum need for housing. Past development has again been also extrapolated, this time based on the period from 2012 to 2024, but this has now been supplemented by a further scenario that allows for a continuation of past *demand* for space, allowing for any suppression caused by limited availability.
- 9.58 These scenarios suggest a need for between 86.4ha and 316.5ha over the period from 2020 to 2040, or for between 84.2ha and 379.8ha over the longer period to 2045. It is the scenarios based on past development and demand that consistently imply the greatest need, for in excess of 305.4ha of land, and it is only these that imply a shortfall – ranging from 141.0ha to 215.4ha depending on the period covered – when accounting for reported completions and the residual supply as of April 2025.
- 9.59 The scenarios can also be broken down by use class, in each case suggesting that the greatest need is for land suited to warehousing, albeit there is also at least some need for offices and industrial premises in every one. When accounting for the type of development that is most likely to come forward on each of the sites in the identified supply – as indicatively assessed by Aspinall Verdi – the greatest shortfall would be for industrial and warehousing land, under the scenarios that extrapolate past development and demand. While there is also implied to be a shortfall of land suited to offices, across all of the scenarios, this is much smaller and could be conceivably resolved through the separate supply of sites suited to a mix of uses, provided they are attractive to the market.
- 9.60 It is also important to consider the quality of sites that form part of the supply, and this has once again been assessed by Aspinall Verdi based on a scoring framework agreed with the Council. This has found all but three of the 35 identified sites to be at least ‘average’, with 11 – offering almost 43ha combined – classed as ‘good’ or ‘very good’. This does though mean that around two thirds of the existing land supply is no better than ‘average’ and given that a quantitative shortfall could already arise in certain scenarios – deemed the most representative – such a modest supply of quality land could ultimately deter investment and constrain local economic growth.
- 9.61 Consideration has finally been given to the need for development to support the ‘*modern economy*’, with it specifically noted that:

- **Manufacturing** continues to form an important part of the local economy, the growth and resilience of which is a key consideration for the Council, and as such it is anticipated that there will continue to be a sustained demand for new modern industrial floorspace. This recognises the evolving requirements of businesses operating in the **advanced manufacturing** sector as well as more traditional parts of the sector. In providing for this floorspace and with reference to the quality of many of the employment sites within or adjacent to existing employment estates it is recommended that the Council considers the opportunity to identify additional sites that meet occupiers' evolving needs, which may include new campus style developments within appropriately sized sites that can benefit from agglomeration benefits and proximity to appropriate academic institutions.
- Stoke-on-Trent has proven a strong market location for **logistics** occupiers over recent years. This recognises its proximity to the strategic road network, with this affirmed through sub-regional studies, such as the most recent WMSESS. This has manifested in strong take-up of more attractive sites in recent years and Aspinall Verdi anticipate that demand will be sustained. There are currently no 'strategic' sized sites (larger than 25ha) within the supply and other sites which are identified by Aspinall Verdi as having greater market appeal have become limited. It is therefore recommended the Council considers the opportunity to identify new sites which can respond to this need and demand. It is appreciated that such consideration should include collaboration with Newcastle-under-Lyme Borough Council recognising their shared functional linkages and the inclusion of a strategic employment site within the emerging Newcastle-under-Lyme Local Plan.
- There is evidence of a growing **digital** economy, including an application for the first **data centre** in Stoke-on-Trent. It is recommended that the Council continues to appraise specific land and floorspace requirements arising from the growth of this sector, recognising specific locational expectations and potential agglomeration benefits.
- The implications of a changing **office** market have been highlighted through the previous studies. There remains a degree of uncertainty in this regard but where there is comparatively modest quantified demand and potential sites suitable for office uses and mixed-use development it is recommended the Council monitors requirements in appraising the extent to which additional land is required to accommodate demands from the sector.

10. Summary and Conclusions

- 10.1 This report has built upon earlier studies and reassessed the future need for housing and employment land in Stoke-on-Trent, over a plan period that is proposed to run from 2020 to 2040, albeit with modelling also presented to 2045.

Setting the scene

- 10.2 The report has confirmed that there has been no significant shift in the functional relationships that Stoke-on-Trent shares with other areas, since it was found to have the strongest links with Newcastle-under-Lyme in 2015. It advises the Council to remain mindful of this relationship as it further develops its new Local Plan, as well as its enduring if lesser links with other neighbours.
- 10.3 It has proceeded to outline how the population, housing market, economy and commercial property market in Stoke-on-Trent have continued to evolve since they were last profiled in 2020, observing that:
- **The rate of new housing delivery has slowed**, with the stock still oriented towards terraced and semi-detached houses that most often have three bedrooms but frequently also have two;
 - **Population growth has accelerated**, having previously been underestimated, with this growth seemingly increasing the number of families and offsetting the steadier growth of the older population, aged 65 and above;
 - **Both rents and house prices have risen**, particularly at higher levels of the latter market which continue to be dominated by detached, and to a lesser extent semi-detached, houses;
 - **Job growth has slowed over the last six reported years**, to 2024, albeit only due to initial underperformance with an improvement having actually been seen since 2020. The health and social work sector has created the most jobs since 2009, and has been outperformed only by transportation and storage since 2018, but manufacturing, wholesale and retail also remain prominent despite recent job losses;
 - **Unemployment remains relatively low** and a growing proportion of residents are qualified to the equivalent of at least the first year of a bachelor's degree, with fewer having no qualifications at all; and
 - **Warehouses and industrial premises have mainly been developed in recent years**, and have less frequently been lost to other uses. While the latter are becoming increasingly large, the former tend to be smaller than was previously reported in 2020. Demand for both, as well as offices, has

eased over recent years – with more space vacated than occupied – but this will have likely been influenced by limited availability of industrial space especially.

Future employment growth

- 10.4 While it has been previously envisaged that an average of around 570 jobs would be created annually in Stoke-on-Trent between 2020 and 2040 – at least as a baseline position – this is based on an increasingly dated forecast that was produced by Experian in March 2020. More up-to-date forecasts are considerably more positive with the latest from Experian envisaging some **945 jobs per annum over the same period, or 912 per annum to 2045**, and another from Oxford Economics only slightly less positive (906/798pa) having previously envisaged job losses. A third forecast, from Cambridge Econometrics, anticipates only 517 jobs being created each year to 2040, rising to 536 per annum to 2045.
- 10.5 All of these forecasts would slow the recent trend that has seen Stoke-on-Trent create an average of 1,110 jobs per annum between 2009 and 2024, rising to 1,643 jobs per annum since 2020. It is reasonable to favour the most optimistic – from Experian – for this reason alone, especially with the National Planning Policy Framework (NPPF) explicitly promoting economic growth.
- 10.6 There do though remain grounds for developing a more optimistic growth scenario, as previously when even the most optimistic baseline forecast was positively adjusted to better reflect past trends. There remain several sectors that are forecast to create fewer jobs than in the past, including some that the Council views as ‘key’ or ‘important’ such as information and communications; manufacturing; and transport and storage. If such sectors instead sustain their past performance, back to 2009, then around **1,350 jobs could conceivably be created annually over the period to 2040, or 1,334 jobs per annum to 2045**. This could be viewed as a more optimistic growth scenario that supplements the baseline, like its earlier counterpart.

Future need for housing

- 10.7 The NPPF continues to require use of a standard method to determine the minimum number of homes needed in an area, but the method itself has evolved since it was previously reported that a minimum of 679 dwellings per annum would be needed in Stoke-on-Trent.
- 10.8 While previously based on increasingly dated household projections, the standard method is now driven by the existing stock of an area with an adjustment then made in areas where house prices have typically equated to more than five years’ earnings, albeit this is not the case in Stoke-on-Trent. The further uplift applied by virtue of its status as one of the country’s twenty largest cities and urban centres has also now been removed.

- 10.9 Since May 2025, the new method has indicated that **a minimum of 951 dwellings per annum** are needed in Stoke-on-Trent, itself around twice the long-term rate of provision and more than have been delivered in all but one year this century.
- 10.10 Demographic modelling suggests that such a level of provision, from 2025 onwards, could cause the population to grow by around 13% over the entire period from 2020 to 2040, or by slightly more (15%) when this is extended to 2045. While this would represent a step up from the growth seen over two decades prior to 2020, it would equally not sustain the particularly strong growth that is believed to have occurred over three years since. It would be expected to grow each age group, albeit with the older population growing most in proportionate terms.
- 10.11 The NPPF continues to make clear that the outcome of the standard method should be viewed as only a minimum, allowing authorities to set higher housing requirements linked to economic growth ambitions. It is therefore of note that such a level of provision could combine with changing behaviours – and add to jobs already known to have been created – to grow the labour force and support the creation of some **1,105 jobs per annum over the period from 2020 to 2040, or 1,038 to 2045**. This surpasses what is envisaged by Experian, as a baseline, but would fall short of the higher growth scenario in which 1,350 jobs would be created annually to 2040 (or 1,334 to 2045). Further modelling suggests that **circa 1,227 dwellings per annum** could be needed between 2020 and 2040 – or **1,269 to 2045** – if the Council was to pursue this higher level of job growth.

Size, type and tenure of housing needed

- 10.12 Based on the types of households projected to form in these scenarios, and the size of homes occupied by their existing counterparts in Stoke-on-Trent, it has been estimated that properties with two bedrooms will most often be needed, closely followed by those with three. Securing such a mix would in turn require the majority of new homes (c.75%) to be houses, based on the profile of the existing stock, although there would also remain a need for some flats (c.15%) and bungalows (c.10%).
- 10.13 This does though continue to represent only illustrative analysis that can be used for guidance and monitoring, or as a starting point for discussion. Such a mix should not be rigidly expected of all sites, given the need to respond to changing market demands, local context, the characteristics of particular locations and viability factors. There could also be an economic case for targeting a greater number of larger detached homes – with at least four bedrooms – to address a longstanding deficiency and support the Council's aim of retaining higher earners that often move elsewhere.

10.14 The report has proceeded to use the well-established methodology through which the need for affordable housing can be separately estimated, updating but not necessarily replacing a separate assessment undertaken last year. It confirms that 2,826 households are currently enrolled in priority bands on the Council's housing register and estimates that a further need for 999 affordable homes will arise each year, as existing households' circumstances change and others form but are unable to afford market housing. While this could generate a gross need for 1,187 affordable homes per annum, various sources of supply should also be taken into account, with the projected availability of 800 affordable homes per annum leaving a net need for **387 such homes every year** to 2040, dropping slightly to **378** over the longer period to 2045. The greatest shortfall is for properties with one bedroom, followed by those with two, but roughly a third does relate to larger homes with at least three bedrooms. While substantially more homes would be needed to deliver such a number of affordable homes, based on the Council's emerging policies, there has long been acknowledgement of the complex relationship between market and affordable housing, so it is ultimately for the Council to exercise planning judgment in deciding how delivery of the latter could be supported through its choice of housing requirement.

10.15 Consideration has also been given to how the identified need for affordable housing could be met through the delivery of social rent, affordable rent, discounted market sale and shared ownership products. The report has shown that the latter two ownership products may play only a limited role in meeting the need generated by newly forming households unable to purchase, since they apply discounts only to new homes that are already priced at a premium, making them cost more than (or the same as) resales even with discounts applied. They could though meet the needs of those unable to *rent*, being affordable to at least 22% of such households. A further 24% could have their needs met by affordable rent – discounting market rents by 20-40% – but the residual 54% would likely be unable to afford even that and could thus require social rented housing. Such a mix is though reflective only of the calculated need, with the Council advised to seek the views of registered providers and also consider viability before deciding on its approach for the emerging Local Plan.

10.16 With the NPPF continuing to require the housing needs of specific groups to be assessed and reflected in planning policies, the report has also established that:

- Growth of the **older population** will likely continue, generating an estimated need for 26-27 bedspaces in care homes each year that is *additional* to the reported need for dwellings, although there could also be further demand for 62-70 units of sheltered or extra care housing that is contrastingly included.
- A shrinking proportion of residents have limiting **disabilities**, with fewer also in bad health, and although there has been growth in the number of

people living in care homes that do not offer nursing there are otherwise fewer living in medical or care establishments;

- Increasingly few households contain dependent children, although the separately reported number of **families** has actually increased in a sign that not all have formed their own households. Those that do are privately renting more often but continue to generally own their own homes, frequently having three bedrooms but increasingly having more;
- Stoke-on-Trent has a relatively large proportion of **looked after children**, whose needs are primarily met through foster care and adaptations, with there being a shortage of local residential placements and affordable housing for care leavers;
- The number of **privately renting households** has increased by almost a third since 2011, with the tendency to rent rising amongst all types of households. Renting households are becoming larger but continue to most often have two bedrooms, typically in terraced houses;
- The number of **students** enrolled at the University of Staffordshire has recently fallen after a period of growth, largely due to increased competition and new restrictions on international students. It remains a primary choice for both younger and more mature students from the local area, many of whom commute from their existing homes. There is though some demand for purpose-built accommodation, not that this would necessarily be expected to rise if student numbers were to grow again.
- Growth in the number of households looking to **build their own homes** has recently slowed. Applicants tend not to have prior experience of self-build and often already own their own home, but some are notably renting. There is a general preference to build individually but some are also open to group and developer-led options.

Future need for employment land

- 10.17 Earlier studies have estimated the need for additional employment land in Stoke-on-Trent but these were based only on outdated forecasts or past take-up – which has inevitably continued – so it has been necessary for this report to revisit these calculations.
- 10.18 The preferred economic forecasts have once again been converted into land and complemented by another scenario which accounts for the labour supply that could result from meeting the minimum need for housing. Past development has again been also extrapolated, this time based on the period from 2012 to 2024, but this has now been supplemented by a further scenario that allows for a continuation of past *demand* for space, allowing for any suppression caused by limited availability.

- 10.19 These scenarios suggest a need for between **86.4ha and 316.5ha** of employment land over the period from 2020 to 2040, or for between **84.2ha and 379.8ha** over the longer period to 2045. It is the scenarios based on past development and demand that consistently imply the greatest need, for in excess of 305.4ha of land, and it is only these that imply a shortfall – ranging from **141.0ha to 215.4ha** depending on the period covered – when accounting for reported completions and the residual supply as of April 2025.
- 10.20 The scenarios can also be broken down by use class, in each case suggesting that the greatest need is for land suited to warehousing, albeit there is also at least some need for offices and industrial premises in every one. When accounting for the type of development that is most likely to come forward on each of the sites in the identified supply – as indicatively assessed by Aspinall Verdi – the greatest shortfall would be for industrial and warehousing land, under the scenarios that extrapolate past development and demand. While there is also implied to be a shortfall of land suited to offices, across all of the scenarios, this is much smaller and could be conceivably resolved through the separate supply of sites suited to a mix of uses, provided they are attractive to the market.
- 10.21 It is also important to consider the quality of sites that form part of the supply, and this has once again been assessed by Aspinall Verdi based on a scoring framework agreed with the Council. This has found all but three of the 35 identified sites to be at least ‘average’, with 11 – offering almost 43ha combined – classed as ‘good’ or ‘very good’. This does though mean that around two thirds of the existing land supply is no better than ‘average’ and given that a quantitative shortfall could already arise in certain scenarios – deemed the most representative – such a modest supply of quality land could ultimately deter investment and constrain local economic growth.
- 10.22 Consideration has finally been given to the need for development to support the ‘*modern economy*’, with it specifically noted that:
- **Manufacturing** continues to form an important part of the local economy, the growth and resilience of which is a key consideration for the Council, and as such it is anticipated that there will continue to be a sustained demand for new modern industrial floorspace. This recognises the evolving requirements of businesses operating in the **advanced manufacturing** sector as well as more traditional parts of the sector. In providing for this floorspace and with reference to the quality of many of the employment sites within or adjacent to existing employment estates it is recommended that the Council considers the opportunity to identify additional sites that meet occupiers’ evolving needs, which may include new campus style developments within appropriately sized sites that can benefit from agglomeration benefits and proximity to appropriate academic institutions.

- Stoke-on-Trent has proven a strong market location for **logistics** occupiers over recent years. This recognises its proximity to the strategic road network, affirmed through sub-regional studies. This has manifested in strong take-up of more attractive sites in recent years and Aspinall Verdi anticipate that demand will be sustained. There are currently no 'strategic' sized sites (larger than 25ha) within the supply and other sites which are identified by Aspinall Verdi as having greater market appeal have become limited. It is therefore recommended the Council considers the opportunity to identify new sites which can respond to this need and demand. It is appreciated that such consideration should include collaboration with Newcastle-under-Lyme Borough Council recognising their shared functional linkages and the inclusion of a strategic employment site within the emerging Newcastle-under-Lyme Local Plan.
- There is evidence of a growing **digital** economy, including an application for the first **data centre** in Stoke-on-Trent. It is recommended that the Council continues to appraise specific land and floorspace requirements arising from the growth of this sector, recognising specific locational expectations and potential agglomeration benefits.
- The implications of a changing **office** market have been highlighted through the previous studies. There remains a degree of uncertainty in this regard but where there is comparatively modest quantified demand and potential sites suitable for office uses and mixed-use development it is recommended the Council monitors requirements in appraising the extent to which additional land is required to accommodate demands from the sector.

Appendix 1: Demographic Modelling Assumptions

STOKE-ON-TRENT DEMOGRAPHIC SCENARIOS

Assumptions Note

June 2026

EDGE
ANALYTICS

ACKNOWLEDGMENTS

Demographic statistics used in this report have been derived from data from the Office for National Statistics licensed under the Open Government Licence v.3.0.

The authors of this report do not accept liability for any costs or consequential loss involved following the use of the data and analysis referred to here; this is entirely the responsibility of the users of the information presented in this report.

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I METHODOLOGY

- 1.1 Demographic scenarios have been developed for Stoke-on-Trent using Edge Analytics in-house forecasting models, VICUS.
- 1.2 The main VICUS model is a 'cohort component' model, which enables the development of population forecasts by single year of age and sex using assumptions related to fertility, mortality and migration (internal and international in and out flows), in line with the methodology used by the Office for National Statistics (ONS) and other statistical agencies.
- 1.3 Alongside this is the VICUS-DF ('derived forecast') model, providing a headship/membership rate model for household and dwelling projections and an economic activity rate model for labour force and employment projections (Figure 1).

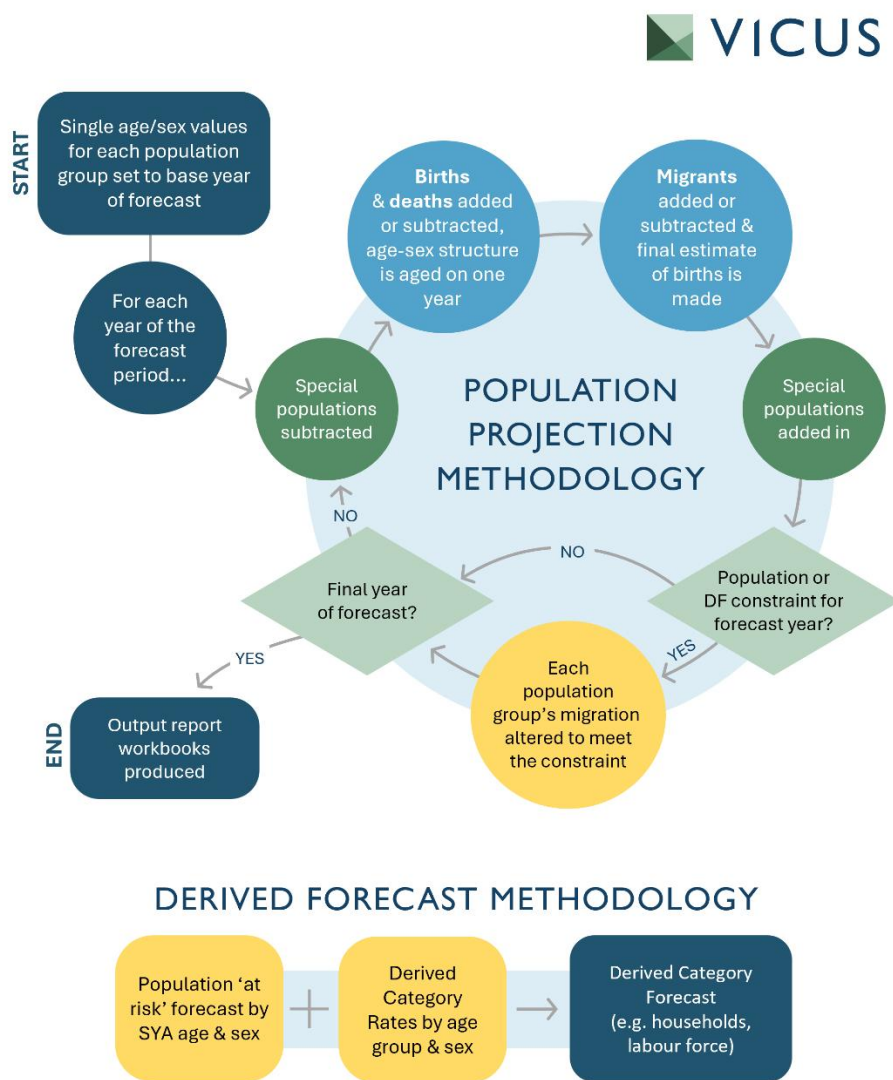


Figure 1: VICUS modelling methodology

2 DEMOGRAPHIC SCENARIOS

Introduction

- 2.1
- Three scenarios have been developed for Stoke-on-Trent using VICUS to a 2045 horizon. In all scenarios, future fertility, mortality and migration assumptions have been derived from the historical mid-year estimate (MYE) time series from ONS and the latest available subnational population projections (SNPP) from ONS. Assumptions relating to household formation have been derived from the 2022-based ONS household projection for Stoke-on-Trent. Labour force growth assumptions have been derived from ONS data.
- 2.2
- Details on the scenario definitions, inputs and assumptions are provided below.

Scenario Definitions

- 2.3
- Edge Analytics has developed one **Dwelling-led** and two **Employment-led** scenarios for Stoke-on-Trent (Table 1).

Table 1: Scenario definitions

Dwelling-led LHN	Dwelling-led local housing need (LHN) scenario with a dwelling growth constraint of +493 in 2024/25 and +951 per year from 2025/26 to 2044/45.
Employment-led Baseline	Employment-led scenario with an employment constraint based on the Baseline jobs forecast for Stoke-on-Trent with a double-jobbing adjustment derived from Annual Population Survey (APS) data applied, resulting in average employment growth of +882 over the forecast period (2020–2045).
Employment-led Higher Growth	Employment-led scenario with an employment constraint based on the Higher Growth jobs forecast for Stoke-on-Trent with a double-jobbing adjustment derived from Annual Population Survey (APS) data applied, resulting in average employment growth of +1,312 over the forecast period (2020–2045).

- 2.4
- In a **dwelling-led** scenario, the scale of population growth is determined by the annual growth in the number of dwellings, with the labour force and employment derived from the resulting population. In an **employment-led** scenario, population growth is determined by the defined employment growth trajectory, with household and dwelling outcomes derived from the population. In both types of scenario, net internal migration is used to balance between population and dwellings/employment: higher levels of net

internal migration will occur where the resident population is insufficient in size and structure to support the defined dwelling/employment growth.

Scenario Assumptions

Population

- 2.5 In the **Dwelling-led LHN** scenario, the forecast base year is provided by the 2024 ONS MYE, disaggregated by single year of age and sex; in the **employment-led** scenarios, the forecast base year is the 2020 ONS MYE. From the base year onwards, future population counts are estimated by single year of age and sex, using the defined assumptions on fertility, mortality, migration outlined below.

Births & Fertility

- 2.6 In the **employment-led** scenarios, historical births estimates for 2020/21–2023/24 have been drawn from the ONS MYE.
- 2.7 An area-specific and age-specific fertility rate (ASFR) schedule is derived from a five-year history of historical births data (2019/20–2023/24). In combination with the ‘population at risk’ (i.e. all women between the age of 15–49), the ASFR assumptions provide the basis for the calculation of births in each year from 2024/25 onwards in all scenarios. Over the forecast period, the ASFR is adjusted to reflect the annual rate of change in the long-term fertility assumptions of the 2022-based SNPP.

Deaths & Mortality

- 2.8 In the **employment-led** scenarios, historical deaths estimates for 2020/21–2023/24 have been drawn from the ONS MYE.
- 2.9 An area-specific and age-specific mortality rate (ASMR) schedule is derived from a five-year history of historical deaths data by sex (2019/20–2023/24). In combination with the ‘population at risk’ (i.e. the total population), these ASMR assumptions provide the basis for the calculation of deaths in each year from 2023/24 onwards in all scenarios. Over the forecast period, the ASMR is adjusted to reflect the annual rate of change in the long-term mortality assumptions of the 2022-based SNPP.

Internal Migration

- 2.10 In the **employment-led** scenarios, the age/sex profile of internal in- and out- migrants have been drawn from the historical internal migration estimates for 2020/21–2023/24

from the ONS MYE. The scale of internal migration is altered by the model to meet annual employment targets.

- 2.11 An area and age-specific migration rate (ASMigR) schedule is derived from the latest five years of historical data (2019/20–2023/24), which determines the age/sex distribution of internal in- and out-migrants from 2024/25 onwards.
- 2.12 In all scenarios, the level of internal migration is altered by the model to meet defined annual dwelling/employment targets.

International Migration

- 2.13 In the **employment-led** scenarios, historical international migration estimates for 2020/21–2023/24 have been drawn from the ONS MYE.
- 2.14 Future counts of international in- and out-migration are derived from the latest five years of historical data (2019/20–2023/24). An ASMigR schedule of rates is derived from the relevant migration history and used to distribute the future counts by single year of age.
- 2.15 Within the historical rebased MYEs, which were released in November 2023 to better align the population estimates between the 2011 Census and 2021 Census, is an unattributable population change (UPC) component. ONS considers it likely that UPC is associated with migration, either internal and/or international, although it does not assign it to any flow in particular. Within the scenarios presented here, UPC is included within the historical international migration flows as this has historically been the most difficult component to estimate.

Households & Dwellings

- 2.16 The Census defines a household as, *“one person living alone, or a group of people (not necessarily related) living at the same address who share cooking facilities and share a living room or sitting room or dining area”*.
- 2.17 In the modelling, a dwelling is defined as a unit of accommodation which can either be occupied by one household or can be vacant.
- 2.18 In the **dwelling-led** scenario, these assumptions are used to derive the level of population growth required to meet the defined dwelling-growth target.

Household Headship Rates

- 2.19 A household headship rate is defined as the *“proportion of individuals in a specific group considered the head of household.”*

2.20 The household headship rates used in the VICUS modelling have been taken from the ONS 2022-based household projection model, which is underpinned by the ONS 2022-based SNPP. The ONS household projections are derived through the application of projected headship rates to a projection of the private household population (i.e. the total population *minus* the communal population). The methodology used by ONS in its household projection models consists of two stages:

- **Stage One** produces the national and local authority projections for the total number of households by sex, age-group and relationship-status.
- **Stage Two** provides the detailed ‘household-type’ projection by age-group, controlled to the previous Stage One totals (Table).

Table 8: ONS 2022-based Stage Two household type classification

ONS Category	Description
One person male	One person households: Male
One person female	One person: Female
One child	Households with one dependent child
Two children	Households with two dependent children
Three+ children	Households with three or more dependent children
Other households	Other households with two or more adults

2.21 In each scenario, the Stage Two headship rates have been applied.

2.22 The rates for the 25–34 age groups are ‘returned’ over the ONS household projection forecast period (2022–2047) to the higher levels of household formation experienced in 2001. All other age-groups remain unadjusted.

Communal Population Statistics

2.23 Household projections in VICUS exclude the population ‘not-in-households’ (i.e. the communal/institutional population). These data are drawn from 2021 Census. Examples of communal establishments include prisons, residential care homes, student hall of residence, and certain armed forces accommodation.

2.24 For ages 0–74, the number of people in each age-group ‘not-in-households’ is fixed throughout the forecast period. For ages 75–85+, the percentage of population ‘not-in-households’ is fixed throughout the forecast period.

2.25 The communal population statistics are therefore used to derive the size of the household population in both scenarios.

Household to Dwelling Conversion Factor

- 2.26 The relationship between households and dwellings is modelled using a conversion factor, sourced from MHCLG Council Tax data. Under both scenarios, a household to dwelling conversion factor of 97.8% for Stoke-on-Trent has been applied and fixed throughout the forecast period.

Labour Force & Employment

- 2.27 The labour force and employment growth implications of the scenarios are estimated through the application of economic activity rates, commuting ratios and unemployment rates. In the **employment-led** scenarios, these assumptions are used to determine the size of the labour force and population growth required to support the defined level of employment.

Economic Activity Rates

- 2.28 Economic activity rates are the proportions of the population that are actively involved in the labour force, either employed or unemployed and looking for work. In all scenarios, economic activity rates by five-year age group (16–89) and sex have been derived from 2021 Census statistics for Stoke-on-Trent. Adjustments have been made in line with the Office for Budget Responsibility's (OBR) Participation Rate Cohort Model Outputs Forecast published in 2025.¹

Commuting Ratios

- 2.29 The difference between the level of employment in an area and the size of the resident workforce (i.e. residents in employment) can be used to infer a 'commuting ratio'. A ratio higher than 1.00 indicates a net out-commute (the number of residents exceeds the level of employment in an area). A commuting ratio lower than 1.00 indicates the reverse: a net in-commute (the level of employment in the area exceeds the size of the resident workforce). The closer the ratio is to 1.00, the greater the balance between the size of the resident workforce and the level of employment.
- 2.30 According to the 2021 Census, the number of resident workers in Stoke-on-Trent was approximately 112,596, with the number of people employed in the area at 116,591. This results in a commuting ratio of 0.97, indicating a net in-commute. The 2021 Census commuting ratios has been applied and fixed throughout the forecast period in each scenario.

¹ OBR [Participation Rate Cohort Model Outputs](#)

Unemployment Rate

2.31 Unemployment rates measure the proportion of unemployed people within the economically active population. In all scenarios, an unemployment rate of 4.7% for Stoke-on-Trent has been applied and fixed throughout the forecast. This has been sourced from the ONS model-based estimates of unemployment.



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Appendix 2: Converting Employment Forecasts into Land

Table 9.3 estimated the amount of employment land that could be needed in Stoke-on-Trent to:

- Support the **preferred baseline forecast, from Experian**, in which circa 945 jobs would be created annually between 2020 and 2040, falling slightly to 912 per annum over the extended period to 2045;
- Support a **higher level of job growth**, where an average of 1,350 jobs would be created annually to 2040 and circa 1,334 would be created each year to 2045; or
- Align with the **supply of labour** that could result from meeting the minimum need for housing, derived from the standard method, where the modelling of this report suggests that this could support the creation of 1,105 jobs per annum to 2040 or 1,038 per annum to 2045. While this offers no breakdown by sector, assumptions can be reasonably drawn from the baseline Experian forecast – as previously²⁰⁵ – to effectively allow for the prospect of there being slightly more labour than it otherwise assumes.

This appendix provides further detail on how these land requirements have been estimated, using the following process that was introduced in the original ENA and continues to feature in the PPG²⁰⁶:

- **Assigning jobs in different sectors to use classes**, effectively isolating those requiring conventional employment land as distinct from other premises like shops and surgeries;
- **Allocating sectors to different types of property**, estimating the proportion of jobs that are each likely to require offices, industrial premises and warehouses;
- **Converting employment into floorspace**, based on employment densities that estimate the amount of floorspace needed by each additional employee; and
- **Converting floorspace into a site area**, using a plot ratio to calculate the amount of land that could be required.

²⁰⁵ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, paragraph 8.38

²⁰⁶ *Ibid*, paragraph 8.39; PPG Reference ID 2a-030-20190220

Assignment to use classes

The jobs envisaged in each of the economic growth scenarios have initially been assigned to use classes, using assumptions set out at Appendix 3 of the original ENA that were used again by the HENAU²⁰⁷.

This alone removes between 55% and 70% of the jobs envisaged by each scenario, on the basis that they are unlikely to require the offices, industrial premises and warehouses that remain the focus of this assessment. The Council is though advised to consider how forecast change in sectors like healthcare and hospitality can be accommodated through policies on site allocations that meet this implied need.

Table 1.1: Job Growth Accommodated in “Non-B” Use Classes (2020-40/45)

	Total jobs, 2020- 40	Non-B jobs, 2020- 40	% of jobs non-B	Total jobs, 2020- 45	Non-B jobs, 2020- 45	% of jobs non-B
Experian baseline	18,900	13,220	70%	22,800	15,680	69%
Labour supply	22,098	15,241	69%	25,955	17,652	68%
Higher growth	27,000	15,018	56%	33,350	18,457	55%

Source: Experian; Edge Analytics; Turley analysis

Allocation to property types

The remaining jobs have then been assigned to property types using the assumptions outlined at Appendix 3 of the original ENA, which are considered to remain reasonable in the absence of any further official guidance. This suggests that there could be particular growth in sectors requiring office space, as well as warehouses, whereas the number of jobs requiring industrial premises is forecast either to decline or remain stable.

²⁰⁷ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, Appendix 3; Turley (November 2021) Housing and Employment Needs Assessment Update: City of Stoke-on-Trent, paragraph 7.10

Table 1.2: Job Growth by Property Type (2020-40/45)

	Experian baseline, 2020- <u>40</u>	Labour supply, 2020- <u>40</u>	Higher growth, 2020- <u>40</u>	Experian baseline, 2020- <u>45</u>	Labour supply, 2020- <u>45</u>	Higher growth, 2020- <u>45</u>
Office	5,515	6,343	7,982	6,890	7,739	9,883
Industrial	-1,890	-1,890	0	-2,160	-2,160	0
Warehouse	2,055	2,404	4,000	2,390	2,724	5,010
Total	5,680	6,857	11,982	7,120	8,303	14,893

Source: Experian; Edge Analytics; Turley analysis

Converting to floorspace

The above can then be translated into floorspace by applying the employment densities summarised at Table 8.2 of the original ENA. While these were based on national research from 2015 and thus take no account of subsequent changes – accelerated by the pandemic – there is no similarly comprehensive nor reliable analysis of how recent events have affected businesses’ use of space, such that these assumptions are considered to remain justified. They do though remain based on full-time equivalent (FTE) jobs, which are reported in the baseline Experian forecast in a way that can also be used to convert the other scenarios as in the original ENA²⁰⁸.

²⁰⁸ By averaging the ratio between workforce and FTE jobs in 2020 and 2040, then applying this to the workforce jobs envisaged in the labour supply and higher growth scenarios

Table 1.3: Implied Need for Employment Space (2020-40/45)

	FTE jobs in Experian baseline scenario		FTE jobs in labour supply scenario		FTE jobs in higher growth scenario	
		Space, sqm		Space, sqm		Space, sqm
2020-40						
Office	3,785	50,341	4,345	57,786	6,462	85,941
Industrial	-1,620	-72,576	-1,620	-72,576	0	0
Warehouse	1,125	82,688	1,318	96,874	3,227	237,190
Total	3,290	60,452	4,043	82,085	9,689	323,131
2020-45						
Office	4,480	59,584	5,011	66,651	8,011	106,547
Industrial	-1,980	-88,704	-1,980	-88,704	0	0
Warehouse	1,195	87,833	1,363	100,168	4,040	296,922
Total	3,695	58,713	4,394	78,115	12,051	403,469

Source: Experian; Edge Analytics; Turley analysis

Converting to land

The land needed to accommodate such amounts of floorspace can finally be estimated, using the plot ratios introduced in the original ENA which are considered to remain valid²⁰⁹.

²⁰⁹ Turley (June 2020) Housing Needs Assessment: Newcastle-under-Lyme and Stoke-on-Trent, paragraphs 8.54 and 8.55

Table 1.4: Implied Need for Employment Land (2020-40/45)

	Experian baseline, 2020- <u>40</u>	Labour supply, 2020- <u>40</u>	Higher growth, 2020- <u>40</u>	Experian baseline, 2020- <u>45</u>	Labour supply, 2020- <u>45</u>	Higher growth, 2020- <u>45</u>
Office	3.4ha	3.9ha	5.7ha	4.0ha	4.4ha	7.1ha
Industrial	-18.1ha	-18.1ha	0.0ha	-22.2ha	-22.2ha	0.0ha
Warehouse	20.7ha	24.2ha	59.3ha	22.0ha	25.0ha	74.2ha
Total	5.9ha	9.9ha	65.0ha	3.8ha	7.3ha	81.3ha

Source: Turley analysis

With the above continuing to represent only net estimates, it is reasonable to once again allow for the replacement of most losses, aligning with the first of the scenarios introduced in section 9 by assuming a continuation of the annual trend since 2016. A buffer equivalent to five years' past development can also be applied.

Table 1.4: Allowing for Losses and Applying a Buffer (2020-40/45)

	Experian baseline, 2020- <u>40</u>	Labour supply, 2020- <u>40</u>	Higher growth, 2020- <u>40</u>	Experian baseline, 2020- <u>45</u>	Labour supply, 2020- <u>45</u>	Higher growth, 2020- <u>45</u>
Office	5.6ha	6.1ha	8.0ha	6.2ha	6.7ha	9.4ha
Industrial	14.6ha	14.6ha	32.7ha	10.6ha	10.6ha	32.7ha
Warehouse	66.1ha	69.7ha	104.8ha	67.4ha	70.5ha	119.7ha
Total	86.4ha	90.4ha	145.5ha	84.2ha	87.8ha	161.8ha

Source: Turley analysis

Appendix 3: Employment Land Supply

The HENAU presented the last published position as to the supply of employment land available to meet needs. A comprehensive update has been undertaken by Aspinall Verdi, considering an updated list of sites supplied by the Council. Aspinall Verdi have undertaken selected site visits to develop proformas for new sites and update the developable position of all sites within the supply.

In headline terms the HENAU identified a total developable area of 206.38ha across a committed supply which was comprised of:

- **Vacant land within existing employment areas** – employment sites incorporating underutilised land. It is noted for the purpose of this assessment following the Council’s methodology this includes vacant buildings. It also includes vacant land / premises adjacent to existing employment areas and vacant land / premises within previously developed sites that include non-employment uses which they consider appropriate for employment uses
- **Extant planning permissions** – other sites with extant planning permission (i.e. permissions that have not yet expired and could be implemented) for employment development.

In reassessing the supply, a similar approach has been undertaken. With regards extant planning permissions, the Council has sought to capture up-to-date information at the time of the assessment in February / March 2026 whilst retaining an appreciation of the position at the start of the monitoring year in April 2025. The Council has also sought to only identify developable space on vacant sites where there are not active uses. It is appreciated that additional land for development may become available on some sites if uses are non-permanent or are subsequently vacated and made available for re-development.

The supply has also been augmented through a consideration of several additional sites which had been included by the Council within the Regulation 18 draft of the Local Plan and were, subject to consultation responses, considered to represent a reasonable contribution to future supply.

Table 3.1 Committed Supply – Developable Area

	Developable area (ha)
Extant planning permission	4.8
Vacant land	89.4
Other / Call for Sites	28.1
Total	122.4

Source: Turley/ Aspinall Verdi, 2026

The changing supply of employment land

Appendix 2 of the HENAU included a table setting out the changes to the employment land supply when compared against the original ENA. This showed that the supply had reduced in the space of a year, due to a combination of the take-up of land as well as amendments made to the assessed developable area of sites.

A comparable table is included overleaf, albeit this time with the updated 2025 position included. It is noted, as explained in the main body of the report, that the Council has included several additional sites within the most recent supply, primarily proposed draft allocations within the Regulation 18 version of its Local Plan. It is noted that this table only includes sites which have seen a change between the HENAU (April 2021 base date) and this study (April 2025).

Site 2020-	Name	Developable area as of...		
		April 2020	April 2021	April 2025*
S69	Former Johnson Matthey, Whittle Road, Meir	8.19	2.80	0.00
S10	Etruria Valley Phase 3a and 3b, Forge Land Etruria	20.50	17.70	2.80
S9	Etruria Valley Phase 2a, Forge Lane Etruria	3.05	0.86	0.00
S8	Wades, Trade Park 4, Hanley Economic & Festival Court	1.70	0.30	0.00
S43	Diamond Gimson Works, King Street, Fenton	2.68	1.40	0.00
S60	Trentham Lakes North	5.92	5.92	0.00
S54	Riverside Park off Campbell Road	0.85	0.85	0.00
S35	Former Brownhill Tileries, Harewood Street, Tunstall	8.58	8.58	0.00
S38	Land off High St, Tunstall	1.14	1.14	0.00
S21	Holdcroft Honda, Sneyd Street, Cobridge	0.22	0.22	0.00
S40	North of Carlich Street	8.94	8.94	0.00
S55	Site off Wheldon Road	3.70	3.70	1.63
S29	Garth Street, Hanley	1.43	1.43	0.00
	Wilson Road, Hanford	52.49	52.49	0.00
S65	Mossfield Road	7.48	7.48	5.61
S64	Land at Mossfield Road / Mossfield Ind Estate	1.55	1.55	0.85
S27	Cockshot Sidings, Shelton New Road	2.85	2.85	2.86
S70	Land at Junc. Of Park Hall Rd / Anchor Road	1.40	1.40	0.00
S15	Land at Century Street / Waterloo Road	6.55	6.55	0.00
S37	Land between Huntlee Road / Scotia Road	9.19	9.19	0.00
S78	Bellerton Lane, Norton	0.30	0.30	0.00
S81	Former Pets at Home, Trentham Lakes	–	–	4.94
S82	Land East of Brocksford Street, Fenton	–	–	0.63
S83	Botteslow Street, Hanley	–	–	0.98
S84	Colbridge Road (West), Hanley	–	–	1.02
S85	Former Greenhouse 2000 site, Festival Way	–	–	1.30
S86	Land east of Scott Lidgett Road, Middleport	–	–	0.34
–	Other sites, unchanged	169.34	169.34	99.42
–	Total	228.74	206.38	122.37

** As set out in the main report, while this assessment has primarily sought to use an April 2025 date, a number of sites had updated positions factored in beyond this point*

It is evident, as would be expected over a longer period of time, that there are many more sites that have seen a change in their developable area. This is primarily the result of sites being taken up or in a number of cases lost as result of being developed for other uses. The likelihood of this occurring was identified within the HENAU (section 7, paragraph 7.22), where it was observed that the supply could fall to 128.7ha based on information at the time.

Positively, several of the sites which have seen developable areas reduce in the above table have seen land taken up for employment uses. This includes S10 (Etruria Valley), which has seen a significant amount of land taken up, reflecting the high demand for employment land on this site. Other sites which have seen strong take-up include S60 (Trentham Lakes), which has seen almost 6ha of land taken up and S35 (Former Brownhill Tileries) which has seen over 8ha of land taken up for logistics development. These have contributed to the increase in industrial and warehouse floorspace referenced within section 3 of the main report and played an important role in related job growth.

As anticipated in the HENAU, however, there have also been some sites where the demand for employment has been low and they have progressed for residential. The most significant is the Wilson Road site, the loss of which was anticipated in the original ENA and subsequent HENAU and which has a permission in place for residential homes and no commercial floorspace (reducing supply by over 50ha). Another large site where this has occurred is S37 (Land Between Huntilee Road) where just over 9ha of employment land supply was lost to residential, with the same also true of S15 (Land at Century Road) where permission was granted for residential.

Considering the quality of supply

Table 9.6 of the main report identifies that all but three of the 35 sites assessed through this process have been classed as at least 'average', with 11 – offering almost 43ha combined – classed as 'good' or 'very good'. The table overleaf provides site-by-site information of the scoring assigned by Aspinall Verdi.

Ref 2020-	Name	Net area (ha)	Rank
S81	Former Pets at Home unit Trentham Lakes	4.94	Very good
S7	East and West Precincts, Hanley	3.75	Very good
S4	Central Business District (Smithfield)	1.08	Very good
S2	Broad Street Area	0.37	Very good
S28	Fenton Quarry	15.04	Good
S57	Newstead Trading Estate	9.71	Good
S10	Etruria Valley Phase 3a & 3b, Forge Lane Etruria	2.80	Good
S80	South of Trentham Golf course	2.5	Good
S85	Former Greenhouse 2000 site, Festival Way, Etruria	1.30	Good
S84	Cobridge Road (West), Hanley	1.02	Good
S19	Trinity St/Marsh St North, Hanley	0.24	Good
S5	Cliffe Vale/Caradon Twyfords Excelsior Wks/Former Slimma	11.77	Average
S34	Chatterley Valley (Area 6): Tunstall Sewage Works - CFS 20	10.69	Average
S42	Berryhill Pottery	10.10	Average
S49	Staffordshire House/Fenton 25	8.10	Average
S36	Former Ravensdale Sportsfield, Land off Chemical Lane, Tunstall - CFS 4	6.53	Average
S65	Mossfield Road - New 8	5.61	Average
S32	Chatterley Valley (Area 2)	3.11	Average
S31	Chatterley Valley (Area 1)	3.07	Average
S52	Land at Whielden Rd - CFS 5	2.97	Average
S27	Cockshot Sidings, Shelton New Rd, Shelton	2.86	Average
S16	Land at Clough Street (Including CFS 12)	2.80	Average
S47	Hewitts, Victoria Rd, Fenton	2.06	Average
S71	Meir Depot, Uttoxeter Road, Meir - CFS 21	1.76	Average
S55	Site off Whieldon Road	1.63	Average

Ref 2020-	Name	Net area (ha)	Rank
S39	Land off Scotia Road	1.52	Average
S83	Botteslow Street, Hanley	0.98	Average
S76	Chatterley Road, Tunstall	0.85	Average
S64	Land at Mossfield Road/ Mossfield Industrial Estate	0.85	Average
S77	Newcastle Street, Middlesport	0.70	Average
S11	Former Clarence Primary School, Sampson St	0.43	Average
S6	College (Snow Hill Building)	0.23	Average
S82	Land East of Brocksford Street, Fenton	0.63	Poor
S86	Land east of Scott Lidgett Road, Middleport	0.34	Poor
S79	Gower Street	0.04	Very poor

Looking at the 11 sites classified as ‘good’ or ‘very good’ shows a mix of larger and smaller sites, as well as those suitable for a range of uses. However, it is important to acknowledge that at 43ha this is a relatively small quantum in the context of average take-up reported in the analysis in the main report and the overall need for land. It is also pertinent to observe that a larger amount of land is only classified as ‘average’.

The implications of this are illustrated, in part at least, with the comparatively slow progress of a number of sites, including some larger ones. This includes S34 (Chatterley Valley Area 6), where it is noted that there continue to minerals / waste operations along with potential viability challenges that mean its potential to contribute meaningfully over the developable plan period is reduced. S36 (Former Ravensdale Sportsfield) which represents some 6.5ha of supply is considered to be similarly constrained.

Aspinall Verdi have also through their latest detailed review of sites identified several other sites which have not seen delivery, noting it is assumed where there remain relatively favourable market conditions and the sites have a degree of potential market appeal that this is potentially related to ongoing viability challenges. These include:

- S49 (Staffordshire House) just over 8ha
- S5 (Cliffe Vale/ Caradon Twyford) almost 12ha
- S42 (Berryhill Pottery) circa 10ha
- S28 (Fenton Quarry) just over 15ha, albeit it is noted that this is identified by Aspinall Verdi as having a more positive scoring than the others.

It is recommended that the Council continues to monitor the challenges impacting on delivery of these sites. Where they continue to present delivery challenges it is important that additional land is identified which can respond to the needs identified within this report for new space.

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