UnderstandingPerceptions inthe ManchesterSalford HousingMarket Renewal Pathfinder

Research, Intelligence and Foresight Programme

Ian Cole, Rosaline Goudie,
Sue Beattie, Chris Allen and Paul Hickman (CRESR)

With Joe Clark (ECOTEC) and Nigel Sprigings (SURF)

Centre for Regional Economic and Social Research
Sheffield Hallam University

i.d.cole@shu.ac.uk
0114 225 4529

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CRESR
Centre for Regional Economic and Social Research

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A. INTRODUCTION

In the ODPM advice to Pathfinders on the submission of the scheme updates, one of the six key areas identified for the revised framework for market renewal was *'Influencing Trends and Meeting Aspirations'*. It is therefore vital to review the potential impact of proposed MSP Pathfinder interventions in creating sustainable housing markets, through intelligent assessment of future trends in demand. In this context it should be noted that:

- the previous information base for MSP was patchy, with relatively little attention given to *potential* household mobility and in consequence it has not been completely fit for purpose;

- at least as much attention now needs to be given to what might attract new kinds of 'pioneer' households into well established, homogenous but declining 'traditional' neighbourhoods in HMR as to retaining existing households by reducing turnover and out-migration;

- it is therefore important to identify: i) the aspirations of existing households in key neighbourhoods in the HMR area; ii) the aspirations of potential households who might be attracted to move into the HMR area once market restructuring is under way;

- preliminary RFI work identified dominant perceptions, and preconceptions, about the different areas in the HMR. This in turn has implications for the scale, focus and timing of programmes of neighbourhood remodelling – 'changing the image' of an area that is currently regarded as beyond the pale by certain social, economic and demographic groups will prove more demanding than trying to nudge expectations about 'marginal' areas in a more positive direction;

- it needs to be acknowledged that the interpretation of perceptions, and their translation into subsequent actions, is more of an art than a science - perceptions are fluid, intentions and priorities shift, and attitudes change as market pressure points move.

The underlying aim is therefore to inform the wider discussion on desired market structures and future neighbourhood typologies for MSP that is a crucial underpinning to the scheme update. The analysis of residents' perceptions complements the other work of RFI, based on 'harder' data and mapping trends. The underpinning rationale for this strand of work is the observation first made by the early 20th century American philosopher William James - that whether or not something is real, if it is *perceived* as real, it will be real in its consequences. In other words, whether or not Area A has a high crime rate, if this is the general perception of the area, it will have an effect on behaviour (reducing external demand, increasing turnover etc.) It therefore has to be acknowledged that whether perceptions of neighbourhoods are 'accurate' or not is less important than the influence they may have on mobility, aspirations and satisfaction.

The analysis in this report also complements the MSP Household Survey undertaken by ECOTEC and presented as an Annex to the scheme update. A succinct summary has also been provided, drawing together these different sources of research. It is therefore important to build up a picture of household perceptions and aspirations and identify:

- those issues and attitudes where there is a consistent response, regardless of location and timing/focus of the survey;

- those issues and attitudes where responses appear to be heavily influenced by area, socio-economic status, household characteristics, BME background etc.

- those issues where there are conflicting or contradictory responses: survey respondents are under no obligation to make internally consistent replies to questions - there may indeed be several different images jostling for their attention when asked their views about another area, for example;

- issues and attitudes where it is difficult to discern any pattern in the responses and where recourse to other data sources and material may be necessary to build a narrative.

The analysis in this report has been based on the following sources:

i) *Focus groups.* These groups were selected following consultation with MSP to present a range of locations and socio-economic groupings. Focus groups allow questions more 'time to breathe'; for the respondents to think through their responses and assess the reasons for them. Part of the rationale for this exercise was to identify the 'conventional wisdom' held about different places, so that any barriers against mobility into and out of neighbourhoods could be more readily assessed. In terms of areas, focus groups were held in Levenshulme, Wythenshawe, Weaste, Worsley, Cheetham Hill, Beswick and Harpurhey. In terms of socio-economic groupings, focus group discussions were held with middle managers, students/recent graduates and emerging households. The discussions were run by ECOTEC and in one case SURF. All group discussions, apart from that at Weaste, were recorded. The analysis of the material was undertaken by CRESR.

ii) *Integrative Analysis of Existing Household Survey Findings*. Some areas in the HMR have already been the subject of extensive surveys, albeit at different times using different questions and with different purposes. Nevertheless, this data can be interrogated to provide an underlying narrative about residents' perceptions and, especially, their patterns of mobility. There is a potentially vast range of information of this kind. This has been summarised on the basis of the main and most consistent messages to emerge from various sources.

iii) *Analysis of Survey results from the NDC National Evaluation* CRESR is leading the consortium that has been evaluating the first phase of the

NDC programme. Separate analysis has been undertaken of the 2004 Household Survey undertaken by MORI as part of this programme, with particular reference to the East Manchester and Salford NDCs. Clearly, this only covers two sub-areas areas within the Manchester Salford HMR but the survey is of special interest because it provides:

- results from a large scale, well resourced survey with good response rates;
- comparison with other NDCs in the North West region to provide some insight into how the dynamics of the housing market in East Manchester and Salford may differ from those elsewhere;
- comparison with a specially selected 'national comparator' sample drawn from deprived neighbourhoods near to (but not adjacent to) NDCs across the country, to assess whether there is an independent 'NDC effect'. Specific attention within the survey analysis is given to perceptions, attitudes and trends in residential mobility - both recent patterns in mobility, planned and aspirational mobility.

These different sources have been brought together in this report to provide a detailed account of how recent changes in the sub-regional housing market have been perceived, to identify the main problems and concerns among residents of different areas and to assess the ‘push’ and ‘pull’ factors driving patterns of actual and potential household mobility.

B. FOCUS GROUP ANALYSIS

EXECUTIVE SUMMARY

Perceptions of Neighbourhood Change and Regeneration in Manchester and Salford

- *There were mixed views about how areas had changed in recent years and about the impact of recent investment and regeneration activity.*
- *There was widespread agreement that Manchester city centre was now cosmopolitan, 'classy', 'much nicer' and made residents 'proud' of their city. It was thought to have attracted new businesses, better shops, more money and nicer places to live*
- *Many respondents pointed to improvements, particularly to the physical appearance of areas such as East Manchester and Hulme and in the development of shops, bars, leisure facilities and new housing close to the centre.*
- *However, respondents felt that many of the improvements that had been undertaken were distant from the problems of their own daily lives, where they faced issues such as disrepair in older housing, intimidating youth behaviour, a persistent drug culture and a lack of local amenities. They also questioned whether improvements and new housing developments were being undertaken with the needs of local people in mind and they felt that they rarely benefited from new investment.*
- *Focus groups involving longer standing residents also expressed concern that the consequence of developing new shopping and leisure facilities was that more local, and hence convenient, shops and businesses were closing down.*
- *The primary concern of respondents across all groups was for concerted efforts to be made to tackle crime and anti-social behaviour, with many reporting an increase in gang culture, drug-related crime and a high incidence of street crime. Respondents felt that many of the physical improvements made in recent years were superficial and that areas would not truly change for the better unless and until crime and anti-social behaviour were tackled more effectively.*

Regeneration and Social Mix

- *With some exceptions, respondents were generally in favour of greater social mix and diversity in their area.*
- *While many residents did not like the idea of any kind of interventionist policy to encourage forcible integration of different cultures, many were in favour of increased ethnic mix and were keen to live in more multi-cultural communities.*

Attitudes, Intentions and Aspirations: Household Mobility

- *The most common reason given by respondents for moving to particular areas concerned the ties they had - either in terms of members of family or friends who currently lived there, or links with the areas from the past.*

- *Affordability and accessibility to the city centre were also factors which had attracted people to the areas where they were currently living.*

- *However, a high proportion of focus group participants wanted to move away from their area, primarily in order to escape 'yobbish culture' and anti-social behaviour.*

- *There were variations between neighbourhoods in terms of the main reason for wanting to move. To the West of the HMR area, for example, affordability was raised as a key issue, while some respondents from Levenshulme, by contrast, required larger properties which were unavailable in the locality.*

- *Safety, an absence of boarded up properties, affordability, imaginatively designed properties, good transport links, proximity to friends and family and good local facilities were all cited as important factors influencing respondents' decisions to move into an area.*

- *Some home owners were unable to move because of the low current value of their properties but reported that if house prices increased they would move away from the areas in response: of course, price trends elsewhere may well affect their ability to act on this preference.*

B1 Perceptions of Neighbourhood Change

Focus group discussions about how areas have changed in recent years invariably provoke more negative than positive responses and this should be borne in mind in the ensuing analysis. The point here is not to provide a precise balance sheet between approving and more critical views, but to identify the main sources of approbation, discontent and uncertainty as one way of tapping into dominant perceptions, reactions and, in the absence of any direct experience, conventional wisdom about the way areas in the Manchester-Salford city region are changing.

In the focus group discussions, residents from East Manchester made unprompted reference to visual improvements in the area, but they also felt there had been too much concentration on new development - and many of the improvements seemed distant from the problems of their own daily lives where they faced issues such as disrepair in older housing, intimidating youth behaviour, a drug culture and a lack of local shops. The main physical change noted by residents in Beswick was the demolition of flats. Along with the growth in housing, all participants felt that there had been a parallel increase in the number of pubs and restaurants one member of the Beswick focus group believed that the introduction of NDC had triggered positive change, but felt that this often brought other problems, due to the transient nature of the incoming population. The new Asda and Sportscity had brought more people into the area, but this had also caused problems, especially on match days, such as fights in pubs and increased bus fares. Most of this focus group felt that local improvements were a mixed blessing, although one young male saw the change as wholly positive.

Levenshulme focus group participants agreed that the area had changed dramatically, but not all felt the changes were positive. On the one hand, several cited Levenshulme as a more cosmopolitan area, which was busier and had later opening hours for businesses. On the other hand, some felt that too many local shops had closed and crime was rising in the area.

In Worsley, new housing developments had been undertaken, as the old factories and mills in the surrounding areas had been converted. In this focus group, the development of new shopping centres and a 24 hour Tesco was seen as contributing to the closure of local shops, including the delicatessen and Post Office, although the fact that the shops in Manchester city centre were only a 10-15 minute drive away also played its part. Those in the ‘middle managers’ focus group also picked up on this point. All Worsley participants had noted an increase in the number of gangs hanging around the new centres, with the most acute problems apparently around the Ellenbrook shopping centre.

Indeed, anti-social behaviour and crime, particularly by young people, were recurring themes in all the focus groups. In Worsley "a *community centre was built and has now been wrecked"* and "*bus shelters are getting broken every weekend*". One participant noted that "*people pay an arm and a leg for houses in the area [Ellenbrook] and don't expect the youth problems*". The middle managers also noted that new houses were being built close to ‘bad’ areas. Furthermore, they described the difficulties in some areas in maintaining businesses, illustrating with an extreme example where crime was so bad that it was not financially viable to run a shop.

"The council gave them the property for nothing, to get them to open it, they won't charge any rent for four years ... they lost more money in twelve months with stock being stolen than they would have paid in rent for four years."

Various triggers of change were mentioned by focus group participants. Some of the older residents in Weaste mentioned that in the 1960s all the council housing had been cleared and flats and other housing were built to replace it. They felt that "communities were mixed-up" and that a sense of community spirit had never been re-established since.

Focus group members from Harpurhey were unhappy about the increased threats to safety in their area, and a fear of crime among residents, with many feeling unable to report crime in case they were victimised for being a "grass". They were concerned that they would become influenced by the drink, vandalism and drug culture within Harpurhey if they remained in the area.

In Cheetham Hill, one participant identified the three big issues as [youth] unemployment, crime and litter. The Cash 'n' Carry was thought to be responsible for a lot of the rubbish and residents felt it gave the wrong image to the area. Again, the parents all agreed that they did not want their kids to grow up "hanging round on street corners". Weaste residents told a similar story and in East Manchester residents said there was a lack of policing and a lack of lighting in the local park. However they also noted that ‘kids’ did not even need the cover of darkness to use pellet guns on residents.

Members of the Wythenshawe focus group felt that crime had increased, as there was now a high incidence of street crime involving guns, knives and car thefts, apparently fuelled by a drug culture. In the past there had been a network of small police stations with a policeman permanently in residence who knew the area well. This has now been replaced by a large new police station, but it is only open from 9am to 5pm, and the police were not thought to have much of a presence on the streets. These residents felt the area had very poor transport links with the city centre, its neighbouring areas and the airport. Places that were easy to get to by car took a double bus or train journey, which, together with the fact that parking in the city centre was too expensive, meant that significant improvements to transport were needed. The Civic Centre was popular with all participants, and was felt to have a good range of shops, as well as a pool, gym and, in the past, a theatre. However, the centre was perceived as dated and in need of further investment. None of the participants were previously aware of the large new sports centre development at the venue site and questioned its viability given that similar amenities existed close by at the Civic Centre.

Although steps have been taken in recent years to diversify property designs, types and tenure, Wythenshawe was still described as "just one big housing estate" built after the last war to house homeless people and migrants from subsequent clearance programmes such as Longsight. All participants believed that the area had deteriorated visually and socially. The primary cause was given as local authority lettings policies, and new incomers were thought to comprise predominantly young single mothers who were allocated houses and 'young lads of sixteen', who were housed in the flats because the "council won't put children in flats anymore". Residents felt that this had skewed the composition of the resident population, resulting in neglected properties and an increase in crime. Older residents and families, 'the decent people', were thought to have moved out or 'died off'. Nevertheless, these criticisms were mitigated by defensiveness, as some felt that Wythenshawe's bad name as a place to be housed was undeserved. All participants agreed that a shortage of jobs was not the problem:

"there are big employers ... it is not that, it is the people you put in".

Household turnover in some properties was important, "*there is never the same person in the house for more than two or three years*", and the upkeep of properties often suffered as a result. The moves to diversify tenure patterns on the estate had not gone unnoticed, and participants felt that increased home ownership would help:

"I think when people buy into a house they look after it better."

"they have brought a lot of new houses in, like these housing association ones where you can part own them, so that is probably better."

Members of the middle managers focus group and those in East Manchester were also critical of allocations policies changing the balance of households in the Salford and East Manchester areas, but in the latter case, although 'bad' families had been moved out, participants claimed that those who had moved in were 'no better'. Cheetham Hill focus group participants had more mixed views about the changes in their area. One focus group member acknowledged that a lot of money had been invested in the structure of the area but it had not provided sufficient activities for youths, especially young women, although there were some Asian Women projects. One resident believed that the youths had low self-esteem and needed positive role models to speak to, "*they [youths] need people to nourish them*".

Members of the Beswick group felt that the presence of community wardens in the area had helped in preventing younger children from partaking in anti-social behaviour. The wardens have no special powers, but acted as a front-line agency, with just a hand radio set to call for police support if required. However, one resident spoke about children stealing these sets and smashing them up.

In Worsley a curfew had been introduced as a means of controlling the number of youngsters gathering in the area. Focus group participants were aware of the potential development of a race track in Worsley, and they were concerned about the added pressure this would place on the roads. Generally, it was felt that transport links with the centre of Manchester could be better, especially buses, although one participant used the park and ride and the tram system to commute to work. The extension of the metro to Worsley would have helped ease these problems still further.

In Weaste, by contrast, residents agreed that public transport was relatively good, although: "… *some buses don't run at night, or they don't turn up…but you never find out why…it's 'cos they're scared'*. Getting a taxi from the city centre to Weaste in the evening was dubbed 'mission impossible'. Taxi drivers decline the fare: '*they think they 'av to wear bullet proof vests to come 'ere*" [a comment prompting laughter and nodding of heads].

Members of the 'emerging households' focus groups, who lived in the north and west of the city, commented on the deterioration of their current place of residence, associated with the rise of a more assertive, and abusive, generation. Eccles was seen as an area that had declined considerably in recent years, reflected in a perceived rise in crime. The onset of a virulent gang culture in Salford was also mentioned, along with complaints that the local authority did not vet tenants before allocating properties.

There was a lot of discussion during the emerging households focus group about parks. Some felt that parks were good to have nearby, as an attractive feature, and something they would look out for when deciding where to move, but only if they were well maintained and safe. On the other hand, some participants felt that any kind of open or public space that invited people to stop would simply attract gangs of kids and then be unattractive. Consequent discussion moved on to the need to maintain areas once work to improve such amenities has been completed.

Changes in the ethnic mix of some areas were noted, as in the comments of residents from Levenshulme about the presence of a growing Asian community in the area. In places such as Worsley, the BME population has always been negligible, but one participant said that in neighbouring areas such as Little Hulton, some groups, such as the West Indian community, were growing, with the majority of incomers in professional occupations. This theme is explored further later in the report.

One Cheetham Hill participant believed the trend of people moving further out of the city would continue, and gave his own take on the long run process of urban deconcentration and suburban drift: .

"Because I have been here for a long time... you know Prestwich, this side of Prestwich, ..., this is how Cheetham was...I am talking about a long time ago, ... this was the place to be, then further down, it were Redbank… where you didn't want to be, ... what really is happening is the city is just expanding and the slums are going to get wider and wider, so in another 20 years you won't want to be in Prestwich, you will want to be further out."

B2. Perceptions of Regeneration in Manchester and Salford

B2.1 Changes in Manchester City Centre

Questions in the focus group discussions explored the impact of the physical changes and new investment that has been taking place across the city in recent years. Responses were mixed. The ‘new’ Manchester might be iconic and the essence of post modernity to some, but not to all. East Manchester residents, for example, said they had little interest in or knowledge about the city centre, beyond occasional trips to the Arndale Centre. Their impressions of areas such as Hulme were often formed from contact or residence long ago - ten years, in one case. In a similar vein, participants from Wythenshawe felt they were well served by local shops, and the Trafford Centre for larger items, so did not feel the need to go to the centre. Indeed most of the focus group participants perceived the city centre as a place solely for young people - especially in the evenings.

Overall, there was widespread agreement that the city centre was cosmopolitan, but less consensus on whether it appealed to diverse age groups. Participants in the Worsley group, for example, felt it appealed to the young, young professionals, single people and affluent people, making comments such as "*It's quite upper class now*" and:

"I think you probably get more of a community spirit in the city centre, right in the centre, there are some really nice bars, cos prices are cheaper than they are locally and they are mixed age groups in the bars ....they are more like your locals than your locals are, aren't they I think? I really like the city centre"

Manchester city centre was perceived by Cheetham Hill residents as "very classy, hip 'n' happening," encouraging ‘big spenders’ and one respondent observed that it was commonplace to see footballers and (even) the Hollyoaks cast walking round the centre. Levenshulme participants described the Gay Village and the Triangle as 'nice', and the Bridgewater Hall as 'spectacular'. There were also positive responses to the regeneration prompted by the Commonwealth Games and the improvements to Piccadilly Station.

The majority of participants in the middle managers focus group described the city centre as being 'much nicer', especially in terms of improvements to the shopping facilities. Members of three of the focus groups independently referred to the landmark status of ‘the bomb’:

"the IRA did us a favour…the city centre is totally different, I'm quite proud of it." .

"They would never have regenerated it had it not been for the bomb".

It was not all good news, however. Members of the Harpurhey focus group were divided in their opinion of the city centre. One resident felt "the area looked better", but another thought that there was now "more litter in the city centre". There was also a stronger sense of exclusion here than in the other areas. These participants felt that the recent improvements had been made for people with money, and tourists and that the new shops were too expensive for Harpurhey residents. One said that the 'backstreets' where they shopped needed to be improved, while others did not visit Manchester in the evening as they found it expensive.

The main negative aspect of the city centre was violence and anti-social behaviour at night:

"It's lovely in the day…but I wouldn't go there at night" [Weaste resident].

Indeed one Levenshulme resident said that the city centre became a 'youth ghetto' in the evening, but also acknowledged that "*there is not a great deal of racial conflict".* Opinion was divided about the safety of the city centre at night. Some felt that the introduction of more street lighting and the presence of more bars and restaurants, the city centre had become much safer. Others felt it was unsafe, as gangs from surrounding areas visited clubs and bars. As one put it, the city centre was still full of '*scallies*'….. they were just "*dressed up scallies*" now.

The evidence base for these views about the city centre was, in some cases, rather rusty. One participant had not been to Manchester city centre for 25 years as he had been mugged several times. Another said "*I'm out of practice [going out in the evening]…it frightens me*". Furthermore, several Levenshulme participants felt 'out of place' in the centre during the evening as it was too 'loud'.

The triumvirate of downsides about the city centre for students were noise, pollution and 'yobs'. One participant in the emerging household focus group felt that the student areas of Manchester were much safer than the city centre. Both students and ex-students liked the area around Oxford Road.

Although it is relatively close in terms of physical distance, accessibility was identified as a problem by residents from Beswick. Many enjoyed shopping in the city centre, but those with younger children felt that they were disadvantaged as they were unable to navigate pushchairs. The group agreed that a tram line was needed. For their part, Harpurhey participants suggested that it was often difficult to get a taxi between Harpurhey and the city centre in the evening. Some Worsley participants found other options more convenient: "*I never go into the city centre since they built the Trafford Centre*." One resident from Weaste suggested that it was actually cheaper to get to Leeds to shop than to Manchester city centre, as it cost £8 to park there.

The redevelopment of Piccadilly Gardens was unpopular, focus group members feeling it was 'concrete' and unsafe, while another said it was 'colder'. Several participants felt that the refurbished square now attracted more gangs than before.

For those who might otherwise consider living in the city centre, current flat prices were deemed to be prohibitive. Residents in Worsley, for example, agreed that the developments promoted by Wayne Hemingway based on affordable city centre living were an excellent idea, but at present prices were just too high. Middle managers without children were also enthusiastic about the idea of living in the city centre but similarly felt that accommodation was too expensive. The area was considered only suitable for young professional couples, as there were not many good schools within the city centre.

"you have to go away from the city centre to get a decent school"

The Levenshulme participants agreed that the changes within Manchester, particularly those undertaken for the Commonwealth Games, had made them proud of Manchester and they wanted more sporting events held in the city. One participant stated that he felt ashamed of the city before it was regenerated. A resident in Weaste commented that "the properties are great", but generally the members of this focus group did not feel that the regeneration of Manchester city centre had any impact on where local people wanted to live.

One resident in Cheetham Hill made the link between the regeneration of the city centre, and the influx of new businesses, attracting better shops, more money, and nicer places to live. This was generally perceived as positive, although one participant wondered if local residents would eventually be displaced as a result:

"The one thing is what would happen if they did do that [regeneration] here? Suddenly we wouldn't be able to afford to live here anymore".

B 2.2 Regeneration Elsewhere in the Manchester Salford Area

The students and recent graduates who attended the focus group felt that Manchester had changed significantly in recent years, and there were now signs that Salford was on the move too:

"Salford has changed over the last five years, and it has been driven by the status of the University, the presence of the University".

These changes manifested themselves in various ways. The University was thought to have improved both in status and in quality and the growth of the student population was seen as positive by the students in terms of the increase in likeminded people, particularly in the Castlefield area. The participants had also noticed the activities of private developers through programmes such as the conversion of the old hospital into apartments and the new police station. They felt the Salford Quays regeneration had benefited the area, but still felt the area had some way to go before it could be classed as a ‘pleasant’ place to live. Participants elsewhere, such as in Levenshulme, also thought Salford had become a more attractive place in recent years.

Towards the south, student participants had noted improvements in Rusholme, Fallowfield, Whalley Range and Withington, but Moss Side, Levenshulme, Gorton and Hulme were still primarily seen as no go areas. Security concerns and the absence of other student communities were the main deterrents here.

In the Worsley group, although the majority of participants could appreciate the physical change and improvements to Manchester in recent years, there was some difference of opinion whether the area could now be considered as a place to move to. Those participants who had lived locally for many years and those with children felt it was not appropriate for their needs.

Most participants in the emerging households group said they did not know Hulme very well, but one suggested that Hulme residents did not feel the area had changed much socially despite the undoubted physical transformation. None of these focus group members said they would move there, though they were more interested in moving to the north of the city rather than to a more central location They agreed that the city centre had become more aesthetically pleasing than before and several said they would now consider living in the city centre for this reason, despite the pollution, if they secured employment there.

Weaste residents felt that run-down areas close to the city centre had improved physically, particularly in terms of "doing-up the houses", but "…*it's not having any effect on the gangs*." The regeneration of Hulme and Moss Side had brought improvements, but had made little impact on social dynamics. Harpurhey focus group members spoke in similar terms, and suggested that the change which had taken place in areas such as Hulme was superficial. Crucially, they felt no action had been taken to remove the ‘bad’ people from the area and members of the group agreed with the view that Anti Social Behaviour Orders and tagging devices did not deter delinquents. Concerns remained about anti-social behaviour in some of the areas being redeveloped. One resident suggested that the potentially positive impact of a nearby new development of large four bedroom houses was marred by its location opposite the Kebab Shop [where gangs of youths apparently hang out] and a hostel for tagged serious crime offenders.

Wythenshawe participants were more positive about the regeneration which had taken place in Hulme, possibly on the basis of more knowledge that those based in the north and west of the city:

"I think it is a lot better than what it was ... because more businesses have gone into the area ... office blocks, new houses and things like that ... you won't get that in Wythenshawe."

This view was echoed by members of the Levenshulme focus group:

"Hulme - what a difference- it is much better now there are so many houses going up".

Participants in the Harpurhey focus group did not feel the construction of new housing in their own area was serving their needs and they claimed they had not been consulted during the process. They thought the new houses were being built in areas where they were visible to 'outsiders':

"They are building where people can see ... but in the middle it is just totally forgotten"

"In my mind it is like a cosmetic view, they are doing all the new build where everyone can see"

Residents complained that the new houses were designed for people who wanted a 'city living', who had a higher disposal income:

"I think they are trying to attract new people".

Nevertheless some residents questioned whether people would want to buy new houses as the surrounding area had not been improved:

"I can't understand why they are building all these nice houses ... I mean would you pay £120,000 for a nice new house to look up my street which is derelict and forgotten?"

Members of the group felt that the new development might exacerbate segregation, as new residents 'looked down' on other Harpurhey residents. They were also concerned that the area of new development lacked sufficient greenery. Some residents expressed concern about the regeneration process, as they had faced uncertainty about whether their homes were likely to be demolished, and felt their privacy had been compromised by the location of some of the new-build property.

"Well the road I am on ...there used to be a school behind us when I bought it, but it has come down and they have built all these new houses, but while they were building them the actual row of houses that I am on was considered to be up for compulsory purchase, and that went on for 3 years, ... we were stuck ... we couldn't sell because if they had done searches it would have come up that it was up for compulsory purchase and we only found out at Christmas that it wouldn't be."

"I have had all my privacy taken away. I stand in my kitchen and I can see into their kitchen" [Harpurhey resident].

Owner-occupier sales to absent private landlords grew in Harpurhey five to six years ago as a result of this threatened compulsory purchase scheme, which also had an adverse effect on property prices - apparently dropping to as low as £6,000. in some cases. However the compulsory purchase programme will not now go ahead. Members of the focus group also complained that they had not been consulted during the construction of a new sixth form college in Harpurhey, and several of the participants feared that this would cause parking problems.

The regeneration of certain areas in the sub-region was considered to have consequences for those areas that had yet to receive equivalent investment. Residents in Cheetham Hill, for example, spoke positively about the regeneration of Hulme and Moss Side:

"... Moss Side - that used to be a no-go area with all the trouble, but that is a much nicer place than it was ten years ago when they had all the gang wars, and all that has gone because they have gone there, addressed the issue, got everybody good housing, flattened the place, got everybody back in there ... and relocated them back right in the same place they lived in, in a brand new house."

However, residents felt that the regeneration of these areas had a negative effect on their perception of Cheetham Hill because less had happened there, either physically or socially:

"Some people say there is no community in the city centre…but there's no community here."

Members of the middle managers group thought that the Left Bank development was expensive, with the price of penthouse apartments exceeding one million pounds. They felt that the development had been purposely built for young professionals and corporate letting – a view also made by a Worsley resident:

"I think it is fabulous, if you are young and don't have a family"

However, another participant said that she had recently divorced and would consider living in an apartment within one of the redeveloped areas, as it was ideal for socialising and meeting new people.

A minority of participants in the middle managers focus group suggested that new property within Cheetham Hill had been purposely built to meet the needs of asylum seekers and 'foreigners'. They felt that Manchester could be improved by 'removing foreigners', and that a stronger police presence was needed, particularly in high profile areas such as Market Street. Two members of the group also thought that attempts made by the council to regenerate Cheetham Hill had failed, as the residents often 'wrecked' the area.

One emerging household participant felt that the physical changes in Cheetham Hill had improved the appearance of the area, but thought that the area would not remain clean, as the residents were untidy. Another agreed that, despite the main street improvements, there were still the same shops and rubbish, so the area had not changed much. Some participants in this group also indicated that the regeneration of areas signalled to them that the neighbourhood had problems and this would make them wary about moving in. One even suggested that the launch of any regeneration initiative merely made gangs feel proud of the area which they belonged to. However another countered this view, arguing that regeneration initiatives improved poor areas by providing local residents with new amenities such as community centres. Nevertheless, the places people liked tended to be the places that had not changed, with the exception being the city centre.

Cheetham Hill residents felt the development of high value apartments in a local listed building had helped to diversify the housing stock. Residents generally agreed that it was good that a more diverse range of properties were now on offer, and that all these flats had now been rented out.

A participant from one of the emerging household groups felt that there was now a culture where gangs "bring kids up", because they are out all day until late at night. Another member thought that the area of Higher Broughton was being continuously demolished and rebuilt as the council were unable to control the number of ‘bad’ residents in the area.

"The houses in Broughton, they have knocked them down so many times, they are forever knocking them down and rebuilding, knocking them down and rebuilding, and they are obviously not doing very good, cos that's why they keep knocking them down."

A number of middle managers felt that the physical change within Manchester had not been undertaken primarily to benefit local residents. One participant stated that the Sports City development had not generated any work for local people. There was also concern about the lack of car parking space within Salford Quays, and the high rate of car crime - a view echoed by a Worsley participant who stated that:

"They are lovely flats round there, but apparently the crime rates are really high"

B 2.3 Regeneration and Social Mix

One of the aspirations of the HMR programme is to change the social, demographic and tenure composition of the area, alongside the programme of physical redevelopment and refurbishment. The social effects of regeneration programmes are often hard to assess and, in some cases, hard to identify at all. On a national scale, programmes to promote social mix in neighbourhoods have had a chequered history – but persistence in achieving such an objective is understandable. The alternative - of non-intervention in a context of increased polarisation and segregation - is hardly a palatable policy option. Members of the focus groups were asked to comment on how far they saw that different parts of the Manchester-Salford were characterised by more mixed populations or by homogenous communities.

Members of the Worsley focus group thought that South Manchester was an area generally populated by 'yuppies', as well as ex-students who had decided to stay in the area. Weaste residents did not think of South Manchester a potential place to live. They perceived it as an affluent area, with one noting that "it's all to do with money". Several Beswick participants felt that the suburban centres were better in South Manchester than in the east or north of the city, while Worsley residents felt that transport links in South Manchester were much better.

Two participants from the middle managers focus group felt that South Manchester was a good area to live in, as asylum seekers were not sent to live there. Other members thought that South Manchester was attractive but it was too far from where they worked, and prices were higher. Some said they would have been interested in relocating if opportunities came up. They felt the area was cleaner and the properties better than in other areas of Manchester but, more importantly, that local residents were a 'different class of people'. However, there was still one perceived drawback about living in the area - students:

"You come over this way where all the students live and it looks tatty, they don't look after the gardens."

"They break them up into flats and then they have an influx of immigrants and they all want to live in one place ... and then you get lots of areas around the university as well, like Hulme, become student accommodation, so again that makes it change because they want cheap accommodation and cheap accommodation is not always best looked after."

The concept of a 'mixed' area is, of course, a relative one. While Levenshulme is often considered to be experiencing an increase in the proportion of BME communities, some of the focus group participants from this area said that they might feel intimidated living in an area where there was a stronger BME presence. However, others suggested that they would consider living in a more thoroughly multi-cultural area, as their children had been exposed to a wide range of people from different cultures at school and had not been negatively affected.

The picture changes markedly in other parts of the city. One Cheetham Hill resident indicated that they would much prefer to live in a more multi-cultural area with a range of housing types: *"I think that is the most positive thing about it"*, and felt that there was currently a lack of diversity in the area. Others similarly felt that a mix of people was important and were critical of the council's housing policies.

"We had the greatest mix of people ... it not only influenced the way we were brought up ... but it also meant that people in the area got to know about things that you wouldn't know ... now Manchester City Council puts pockets of people within groups."

All Cheetham Hill residents agreed that there was now no sense of community in the area, one commenting that "…*it feels like there is more of a community in this room, than there is in this area."* Another resident claimed that they lived in a block of four flats, and that two of the other three flatmates couldn't speak any English. Many newcomers, it was claimed, had very poor English skills. One had originally moved to Cheetham Hill after encountering racism in a nearby area, but felt that Cheetham Hill was too dominated by members of the Asian communities, and would prefer to live in a more ethnically diverse area.

Weaste residents felt that the apparently greater degree of social cohesion and the absence of a gang culture in South Manchester was more to do with greater affluence, as mothers could afford to stay at home while "*round here [Weaste] both parents have to work."* The implication is that parents have more control over their children, so they were less likely to be hanging around on street corners. Residents did not like the idea of any sort of interventionist policy to encourage the integration of different cultures, and felt that different racial groups would not integrate even if they were self-consciously "mixed in" together. One resident said that, "*it wouldn't change anything, you need to educate people*." Another said that he went to Cheetham Hill for his spices "…*but it's gang culture round there'.* Focus group members felt that Weaste was a place that was slow to accept change and that this would make it difficult to integrate other cultures or new ways of doing things.

Members of the Harpurhey group agreed that a better cultural mix was needed and they felt that some BME groups segregated themselves from the rest of the community. These residents did not cause any trouble, but it was felt that this was because they did not speak to anyone outside their own groups. Members of the middle managers focus group contrasted what was seen as the dislocation of communities in the north of the city with the experience in South Manchester of residential sustainability. They thought this was because social tenants had been vetted more closely than elsewhere and there was a stronger police presence at street level. South Manchester was not seen as an integrated community, but it was at least a mixed community with a low level of tension between different ethnic and social groups.

B 3. Attitudes, Intentions and Aspirations: Household Mobility

Household mobility is rarely a straightforward response to a single stimulus, but a more complex decision taken for a whole jumble of positive, negative, contingent, considered and instinctive reasons. It is nevertheless possible to discern some recurrent factors that caused people both to move in and to move out of particular areas on the basis of the focus group discussions.

B 3.1 Reasons for Moving into an Area

For research purposes, an inward mover was defined as someone who has moved in to the area in the last twelve months. The most common reason given by participants for moving into a particular area concerned the ties they had - either in terms of members of family or friends who currently lived there, or links with the area from the past.

A second group of reasons concerned perceptions of the area - the improvements made in the Beswick area were cited, for example, in terms of new dwellings and the school and because the area was felt to be 'going up'. The perceived relocation of 'bad families' out of this area was also mentioned as a positive attribute. The only in-mover in the Weaste focus group was attracted to the area as it was quieter than where she had lived before and because there were not "many gangs".

Some areas were mentioned in terms of their relative affordability and accessibility to the (Manchester) city centre - such as Cheetham Hill and, for students, parts of Salford. Job-related reasons were mentioned, but this tended to affect the decisions of those who had moved in from outside the HMR area altogether. While accessibility to the city centre was an attraction to some, it was a deterrent to others. One of the positive aspects of Levenshulme, for example, was precisely because it had an array of shops and facilities that meant that trips to the city centre were not necessary. Life cycle factors influence these perceptions, with Manchester widely seen as a 'young persons' city.

In terms of the specific groups, the majority of students and recent graduates said their decision to attend university in Manchester was less influenced by the area than by course content. Other reasons cited for attending university in Manchester included that it was close to home, and that Manchester is a 'studenty' and lively place. Indeed all the student participants lived in the North West prior to coming to University, except one who was originally from London.

All but one of the students interviewed said they would still choose to come to Manchester, either because their experience of the course was positive or they enjoyed being near Manchester city centre. Yet there was some dissatisfaction about a lack of recreational activities in Salford, and concerns about safety on the streets. Nevertheless, six out of nine participants in the first student focus group intended to stay in Salford. Several reasons were given for wanting to stay: first, cheap rents, making it much more affordable than Manchester city centre; second, Salford was thought to be less congested, less polluted and less busy; third, the excellent train and bus routes made it possible to live in Salford and travel to Manchester city centre to work and play.

Members of emerging households who wanted to stay in Salford/North Manchester area generally wanted to do so because of family connections, but they also wanted somewhere ‘quiet’ which they felt would be hard to find in this area, especially if they wanted to start a family.

3.2 Reasons for Moving Out of an Area

A high proportion of focus group participants simply wanted to get away from the area they currently lived in. As one focus group participant in Weaste said

"I'm not bothered (where) .... I just want out".

Similarly, in Harpurhey, many participants indicated they wanted to move out and, when asked to identify areas where they wished to move to, they responded by saying "anywhere". However, in contradiction to this sentiment, members of the group would not consider moving to Collyhurst, Moss Side or Salford. These participants were looking to escape to somewhere where they could get 'peace of mind' and 'a good night's sleep', instead of being woken by the sound of breaking windows. But their areas of preference, such as Whitefield and Blackley, would be difficult for commuting.

The general trend was to express preference for an outer suburb in a similar segment of the sub-region as where they were currently resident. Members in Worsley and Weaste mentioned such as Prestwich, Whitefield or Bury. The areas identified by other participants included Little Hulton, Eccles and Tinsley (residents of Worsley), Bury (resident of Cheetham Hill), Ramsbotton or Urmston, and Rochdale (residents in Weaste), Macclesfield and Rochdale. More ambitious destinations ranged from Wales to the USA!

The reasons given for wanting to move out were, again, a mixture of the personal, social, environmental, infrastructural and economic, including:

- to escape ‘yobbish culture’ and schoolkids’ behaviour
- affordability
- quality of area and facilities
- family and friends
- schools- to reduce commuting, and to gain access to better schools
- needing a nicer area to bring up children
- lack of activities for young people
- lack of community spirit
- fewer car fumes.

An overwhelming majority of those participants who wanted to move gave anti-social behaviour, in one form or another, as their primary reason. Residents in Beswick said many felt intimidated by the local subculture, including drug dealing, under-age drinking and dangerous driving. Some felt that this prevented their children playing outside, but others were able to cope with the problem of delinquent teenagers as they just left them alone.

Residents of Weaste felt there was a lot of anti-social behaviour in the area. One participant indicated that she had witnessed a 50 person riot [youths fighting] near her home, while another said:

"I've had a couple of break-ins ... and you just get pissed-off with it".

One felt that the "*Kebab Shop brings 'em all in"* and also that"...*ASBOs aren't worth the paper they are written on", "...they [young people] hang around the Kebab Shop ... and they scratch cars".* Some residents wanted policies in Weaste similar to those for Bury "*Bury has moved all the gangs on ... Bury is brilliant ... that's what 'our kid' says as well [about Bury]"*

Weaste residents believed there was a lack of youth facilities and community spirit. "*Money is wasted on houses"* that *'look good for councillors'* and dignitaries to drive past, but there is still nothing for the children to do. They wanted a playground to be built and more activities for older children. There was a general feeling that, although the area looks better following recent investment, the gain was undermined by a continuing lack of community spirit, too many kids "hanging around" and *"they still put the riff-raff in".* One resident in Weaste was thinking of moving in order to get their children into a better school.

"there's too many supply teachers ... there's no consistency in the schools."

Similarly Cheetham Hill households mentioned school kids hanging around, dropping litter, and causing bother, and disruptive neighbours, or "*stereo nutte*rs" as reasons for wanting to move away. Some participants in the Cheetham Hill focus group wanted to move as their children already attended schools outside their area and because they thought the area would be better to bring up children. Similar sentiments were expressed in the Harpurhey group. It was felt that a small percentage of young people were causing a nuisance by vandalising property and congregating near public amenities such as shops and parks. The focus group felt that the outskirts of Manchester were now becoming more like archetypal inner city areas in terms of vandalism and anti-social behaviour. They felt greater police presence was needed as community wardens did not have enough power, and that the provision of a local youth club would help.

To the west of the HMR area, such as Worsley, however, the key factor was affordability. Property prices in Worsley were perceived as too high for first time buyers, forcing them to consider properties in neighbouring areas, such as Little Hulton, Eccles or Tinsley. Residents were looking to neighbouring areas which could provide a similar quality of living, in terms of the area and facilities, but were more affordable.

In Levenshulme, the reasons for moving out were more about the type rather than the cost of the property. The majority of those wanting to move needed a bigger house for their family; the social and ethnic diversity of the area did not seem to be matched by a similar diversity in the affordable housing stock.

All of the emerging households focus group participants currently lived in areas around Cheetham and Salford. However, most of the participants did not want to live in Salford, as they felt it was unsafe, and inappropriate for raising a family. These members felt that Salford was full of 'scallies' and not a good place to live. Among the anecdotes was a story about a 6ft 21-year-old man being challenged to a fight by a small, but clearly somewhat belligerent, child.

Members of this group gave the following reasons, when asked by the facilitator how they determined if an area was suitable for them:

- if they knew the area already;
- word of mouth, from friends, work colleagues and family;
- if other members of the family had already left the area;
- if there were good public transport links;
- the property itself;
- getting a grasp of the 'feel' of the area: for example, broken bus shelter glass, kids hanging around in groups, and bad lighting after dark were mentioned as key negative clues.

The following answers were given by emerging household participants when asked to identify the factors which would influence their decision to move into an area:

safety: the area should be suitable to raise a family and safe for young children, without any traces of a gang, drink or drug culture.

no boarded up properties: as they fostered drug use and anti-social behaviour and could be intimidating

good amenity: with no litter or neglected public spaces

price and affordability: although these were second order concerns: if some of the other issues were present, they would not be attracted to live there, however low the property values**:**

imaginatively designed properties: new property was often perceived as of poor quality, small and lacking character. ‘Council estates’ (as perceived, whatever the actual tenure profile in practice) fared poorly too.

good transport links: especially for commuting to work

proximity to family and friends.

good local facilities: eg. supermarket, parks, and shops. A large supermarket nearby was important, as was a local corner shop within ten minutes’ walking distance.

The members of the ‘middle managers’ focus group who were looking to move had typically lived in their current area for a long time. Their decision to move was likely to be motivated by the need to be closer to their family. On the other hand, a number of participants were prevented from moving due to family ties, or were constrained by house prices.

The most common destination for those middle managers who would like to move was Prestwich or Whitefield. Prestwich was perceived to be a more suitable area for children, and had good schools, but participants felt that property was relatively expensive and they were having to cast the net more widely. Another participant was reluctant to move to South Manchester as he felt the area has become too student-oriented. He felt that North Manchester was cheaper and had better transport links. One city centre resident also mentioned Prestwich as a possible destination.

B 3.3 Mobility and Affordability

Affordability was mentioned as an important issue for young people wanting to live in Worsley. One resident indicated that, if you moved one mile out of Worsley, it was possible to buy a bigger house for £10,000 less:

"If you move slightly out of the area, you don't have to move a long way out, you get a lot more for your money"

This resident indicated that he aspired to live in Worsley again, once he was further up the property ladder. Participants said that the housing market in Worsley had always been buoyant, and was an aspirational area, "*it's a good investment, anybody would want to live here*." One young resident indicated that although she would be able to afford a mortgage she had been unable to secure one for property in Worsley, and had to rent instead. Another participant indicated that rents had "shot up", though people were still willing to pay them. He had moved from a terraced house outside the area, where he was paying £350 a month, to a much smaller flat, where he was now paying £500 a month.

Cheetham Hill, on the other hand, was considered well located and relatively affordable. The level of house prices, as well as the availability of housing association accommodation and council housing, were important 'pull' factors for potential households.

Participants in the East Manchester focus group were social housing tenants and therefore perceived the housing 'market' in a much more constrained way. They resented being dependent on the administrative systems of the public sector (illustrated by various comments along the lines that '*once you get into Beswick they don't let you leave'*).

Home owners within the Harpurhey group felt that they were unable to move if house prices in other areas increased. These residents felt that they were unable to get a good price for their own homes. Among council tenants, several participants complained that the waiting list for good areas was too long. Residents who owned their own home in Weaste indicated that cost was an important influence on behaviour, because the market had "*died…if you sell* *around here it's to first time buyers."* One member suggested that if she wanted to buy a property outside Weaste she would have to add 20% to buy something of a similar quality and size.

Although the majority of students aspired to live in the city centre - for example Deansgate - prices were seen as prohibitive, and those who knew the market said they could only afford a 'box' in the city centre. Recent graduates felt that new build developments were targeted at specific groups.

"What is happening now, is you are getting investors that are buying a plot of land, building three or four houses in a row, demolishing a lot then building a big block of flats on there - you know, guarded car parks and they stick railings all around them, full security ... they promote them to young professionals and graduates, but they are affordable and you will find that that is what a lot of people are doing these days ... where the land is cheap ... they will build a block of real modern, contemporary, desirable flats."

However, for existing students university accommodation was considered a more realistic and convenient option.

"I didn't bother trying to find anywhere else because the University itself had so much accommodation which was cheap, it was safe, so I didn't bother to find anywhere else, I just stayed where I was."

A member of the middle manager focus group referred to the north-south divide in Manchester's owner-occupied market:

"North Manchester, some bits of it, Prestwich say, is maybe dearer than Salford, it is still a lot cheaper than South Manchester, the houses".

Those members of the emerging household group who were seeking rented accommodation preferred them to be based in predominantly owner occupied areas:

"I prefer areas where it is mostly normal housing estate and then the odd rented place around ... though then again, I suppose the people who live there full-time must worry about who is going to move in to the rented house down the road."

Several members of this group said they would consider buying a property if they were settled, but many would only consider purchase if the area surrounding them was improving. One said that she would consider moving into a council house and wait until she could purchase the property at a lower price from the council. Members of this group felt they were competing with those households wanting to move out of the expensive properties in the city centre, who had higher disposable incomes.

"And then eventually they want to move out to the area, once they want kids, they want to move out of the city centre"

"They are buying in the areas we want to live in, because they have made their money on their properties and they are buying the expensive houses where we want to live ... so we are all stuck now, because we like these bigger houses but those who are making the money on these big apartments ... are buying out of town now".

Several emerging households felt that renting was a 'waste of money' and felt that it would be better to remain at home with their parents until they were able to purchase property. They noted that it had become more difficult to purchase a property and most would not buy in an area where house prices were falling. They were looking to invest, and to purchase in an up-and-coming area. Furthermore, the majority of the group would not consider purchasing a newly built home unless it was the only option in the neighbourhood. They claimed new housing lacked individuality, were not strongly built and that the walls were so thin you could hear neighbours talking.

However cost of purchase or rent was not the only factor to be taken into account.

"The odd thing is you get a Worsley address but when it comes to car insurance and house insurance you are actually a Salford address because they take it that Worsley is actually a part of Salford… you get massive council tax because you are a Worsley address and you get massive car insurance and house insurance because you are a Salford postcode." [Worsley participant]

"Manchester rates used to be very expensive, under the old ratings ... whereas Stockport ... they were half the price, and now Stockport is dearer than Manchester and that is one of the things when you are buying a house, what the rates are, which is council tax." [Wythenshawe participant].

One resident living in a housing association property talked of wanting to move because of "harassment from local people." Due to an apparent lack of response from the association, she was now considering making herself and her children homeless so that they would be re-housed quicker.

Residents in Cheetham Hill talked about the fact that [some] private sector landlords were more concerned about rent levels than in providing a decent home for people, while residents of Harpurhey had noticed an increase in the number of properties owned by private landlords:

"There were a lot of older occupiers, and they sold to private landlords ... the house prices plummeted 5 or 6 years ago ... a lot of people sold up straight away."

Additionally these residents felt that a private rental property was easily identifiable due to its poor condition. Derelict properties were a problem as they were often burnt by young delinquents. One participant felt that she was unable to sell her own home as a result of an adjacent property being taken over by a private landlord. Members of the group agreed that the private landlords should be held responsible for ensuring that their properties are kept in a good condition. The group also agreed that the police were slow to respond to complaints, such as damage to their property caused by repairs made by private landlords.

B 3.4 Future Housing Aspirations

Future housing aspirations varied considerably between and within different focus groups, some wanting to move relatively short distances, others wanting to move outside Manchester, and some wanted to move abroad (Australia was a popular destination for some Beswick residents…). These aspirations seemed to be more heavily influenced by neighbourhood considerations, especially anti-social behaviour and finding a suitable school, than by the type of housing required.

Generally speaking people wanted to move within the area or to move to a neighbouring area further away from the city centre. An exception was in Cheetham Hill, where three out of eleven indicated that ideally they would like to move to South Manchester, which they felt was more ethnically diverse. Encouraged to think away day-today realities and practical constraints, some focus groups expressed considerable enthusiasm for living in gated communities - big high walls with barbed wire and protected space - or, if not, on remote islands. However, most accepted that the best they were likely to get in reality was a comparatively quiet enclave in the area they currently lived in.

Student participants agreed that Salford was not an aspirational area for postgraduates to live in and Cheetham Hill was seen as 'dodgy'. . South Manchester was viewed more favourably. Otherwise eventual location would be driven by job availability. While the centre of Manchester was good for cultural industries, those interested in careers in established professions, such as law, would need to move further out, possibly towards Cheshire

Students felt that some businesses were attracted to the area by the pool of graduates available, and some had friends from Manchester or Salford who had returned to the area after studying elsewhere, and who planned to stay. However, one student observed that she knew a few people who wanted to stay in Manchester now they had graduated but were struggling to find anywhere affordable to rent. Fallowfield was seen as an ideal area for students and recent graduates, although long term those who lived there hoped to move out. North Manchester was identified as the most likely area for students looking to buy, but several did not intend to do so in the next few years, but rather to continue to rent and "move around a bit".

Students from both Manchester and Salford said they preferred to be geographically segregated because "scallies don't like students' and because some of the advantages of student life would be diluted if there was more social mix.

C. ANALYSIS OF EXISTING SURVEY DATA

EXECUTIVE SUMMARY

Socio-Demographic Characteristics of HMR Residents

- *There are no dramatic differences between the characteristics of respondents from Manchester HMR and Manchester, nor between those of Salford HMR and the wider Salford area.*

- *The breakdown of ages and gender of respondents for Manchester HMR and Manchester respondents are fairly closely matched, although there is variation in working status, with a smaller number of HMR residents in full time employment.*

- *Most of the survey evidence suggested that HMR areas have a greater proportion of minority ethnic groups overall, but some groups were less strongly represented, and the evidence was not always consistent.*

Tenure and Property Profile in HMR Area

- *Tenure profiles of respondents from within the Manchester HMR do not differ greatly from those of Manchester respondents in general.*

- *There are differences between Salford HMR and Salford in the smaller proportion of respondents who own their properties outright, and are buying on a mortgage.*

- *On average properties in Salford HMR have fewer bedrooms and living rooms compared to dwellings in Salford as a whole.*

Residential Mobility

- *All three surveys carried out in Manchester show that only around five or six percent of respondents have moved to the area in the last year and that about 40 per cent of respondents have lived in the area for over 21 years. There was little difference between the two areas in how long respondents had been at their current residence.*

- *The slightly greater rate of residential mobility in Manchester HMR was also reflected in a marginally higher proportion of respondents who intended to move within the next year.*

- *Although improvements in East Manchester had been observed by respondents from Manchester HMR and Manchester as a whole, about half the respondents from both groups indicated that they would not consider moving to East Manchester. However, the distance between East Manchester and the city centre was not considered a major barrier, and over 30 per cent of HMR respondents felt it was now the place to go to participate in sport.*

Neighbourhood Problems

- *Perceived problems with their local area seemed to be slightly more acute in HMR areas than in the two cities as a whole.*

- *Vandalism and graffiti, teenagers hanging around, litter and rubbish, the speed and volume of traffic, dogs, noisy neighbours and attacks because of race, ethnic origin or religion were considered to be problems by a slightly greater proportion of respondents from HMR areas than in the cities as a whole.*

- *On some issues the differences between HMR areas and the complete sample were more pronounced. There was a marked difference between the proportion of respondents reporting problems with drug dealing/abuse in their area in Manchester HMR when compared with Manchester as a whole. Similarly, personal assaults were considered to be much more of a problem in Salford HMR than Salford, as was the existence of empty or run-down properties.*

- *Manchester HMR respondents felt slightly less safe in their neighbourhood than respondents from Manchester as a whole.*

Overall Neighbourhood Satisfaction

- *Respondents from Manchester and Salford HMRs were marginally less satisfied with their neighbourhood as a place to live than respondents from Manchester and Salford as a whole.*

- *On the other hand, a slightly larger proportion of respondents in the Manchester HMR were satisfied with their home than in Manchester overall.*

Urban Services and Facilities

- *A higher proportion of respondents from Salford HMR rated public transport as 'very good' compared to Salford as a whole and a similar picture emerged in rating parks and open spaces as 'very good'.*

- *Schools were not rated quite so highly by HMR respondents as the population overall.*

- *Views about the quality of shopping facilities did not differ greatly between the two groups of respondents.*

- *Leisure facilities in Salford received very mixed responses, whereas in Manchester respondents expressed either satisfaction or indifference towards sports and leisure facilities and events. The levels of satisfaction among* *respondents in Manchester as a whole to sports and leisure facilities was comparable to those from Manchester HMR.*

C 1 Method of Survey Analysis

C 1.1 Survey Coverage

The Salford HMR comprises of the following wards: Blackfriars, Broughton, Claremont, Kersal, Langworthy, Ordsall, Pendleton and Weaste & Seedley. One should note that not all of these wards are exclusively contained within the Salford HMR boundary. However, in terms of the available data, and without being able to sub-divide wards, it is the best approximation that can be achieved.

The Manchester HMR is made up of 19 of the 33 Manchester wards, namely: Ardwick, Beswick & Clayton, Bradford, Central, Charlestown, Cheetham, Crumpsall, Fallowfield, Gorton North, Gorton South, Harpurhey, Levenshulme, Lightbowne, Longsight, Moss Side, Newton Heath, Old Moat, Rusholme, and Whalley Range. However Central, Charlestown, Crumpsall and Whalley Range are mostly not inside the HMR so for this report have been excluded from our analysis.

Of the above wards Bradford, Newton Heath, Beswick and Clayton, Ardwick, Harpurhey and Gorton North lie within the New East Manchester area.

C1.2 Difficulties of Analysis

Drawing any strong conclusions from the cross-survey comparisons which follow is difficult for a number of reasons.

- The surveys were carried out in different years, and with new initiatives and changing circumstances, residents' perceptions may change year by year.
- The sample sizes vary widely between surveys, but also between different questions. In some cases the number of respondents who answered a particular question is too small to permit any confident interpretation of the findings.
- The extent to which the samples accurately reflect the relevant populations varies, as they were selected using different criteria and with different purposes in mind.
- In the following analysis none of the data have been weighted to take age, ethnicity or any other factor into account.
- The HMR area covers just parts of some wards, but it is not possible to examine survey data below ward level, so the areas are simply approximations of the HMR area.
- The questions in the surveys are not always entirely equivalent, as the range of answers may differ and even subtle differences in the wording can lead to different interpretations, especially as they are not necessarily set in the same context. Consequently all comparisons between surveys should be viewed with caution.

C 1.3 Sources of Data

In the tables which follow the number in brackets indicates which survey the data are taken from:

1. Best Value Performance Indicator survey
2. Panel survey
3. LSP Quality of Life survey
4. New East Manchester (NEM) Resident Perception survey (2002)
5. Salford Housing Market Demand Survey 2003 (HMDS).

The sample sizes differ considerably, and, as stated above, the data are presented in unweighted form.

C 2 General Characteristics

C 2.1 Housing Tenure

TABLE C 1 TENURE

Tenure.								
	Owned outright	**Buying on mortgage**	**Rent from council**	**Rent from Housing Associati -on/Trust**	**Rented from private landlord**	**Other**	**Total**	**N**
Manchester HMR (1)	23	21	26	12	11	8	100	1831
Manchester (1)	24	26	23	11	9	7	100	3995
Manchester HMR (2)	21	31	27	10	9	2	100	824
Manchester (2)	22	36	22	8	9	2	100	1874
Manchester HMR (3)	51 *		28	11	8	2	100	1581
Manchester (3)	52 *		26	11	9	2	100	3321
East Manchester (4)	24 *		53	13	11	0	100	987
Salford HMR (5)	22	25	33	11	8	0	100	34144
Salford (5)	28	31	30	6	5	1	100	95406

Notes:

- In survey 1 'other' and "no answer" are combined into "other".
- Similarly for survey 2 the "other" and "not stated" categories have been combined into "other".
- In survey 3 the "other" category represents the percentage living with family. The first column indicates the percentage who own their "own home with or without a mortgage".
- In survey 4 the first column shows the percentage of respondents who are "home owners".
- For survey 5 "Rented privately- unfurnished" and "Rented privately- furnished" have been aggregated into "Private Tenant", and the category "Other" is composed of the categories "Provided with the job" and "Shared ownership".

Over half of households in East Manchester HMR are council tenants, compared to a third in Salford HMR and just over a quarter in Manchester HMR as a whole. An aggregation of the first two columns shows that in East Manchester almost a quarter of respondents are home owners, whereas in Salford HMR, and Manchester HMR, the proportion is almost twice as high, and for Salford as a whole around 60 per cent are home owners. All areas shown in Table C1 have a similar percentage of Housing Association tenants, at around 11 per cent, with the exception of Salford as a whole which has half this figure. In East Manchester HMR, Manchester HMR, Salford HMR, and Manchester as a whole about 10 per cent of respondents rented from a private landlord. This is double the figure for Salford as a whole.

C 2.2 Property Type

TABLE C2 PROPERTY TYPE

a) Is your home?							
	A flat, bedsit or maisonette	**A terraced house/ bungalow**	**A semi - detached house/ bungalow**	**A detached house/ bungalow**	**Other**	**Total**	**N**
Manchester HMR (3)	17	36	38	5	3	100	1546
Manchester (3)	19	32	40	6	3	100	3265

The Manchester HMR area had a slightly smaller proportion of flats, semi-detached houses and detached houses than Manchester as a whole. 36 per cent of respondents here lived in terraced houses, compared to under a third in Manchester.

b) Property type									
	Detached House	**Semi-detached House**	**Terraced House**	**Bungalow**	**Maisonette or Bed-sit**	**Ground floor flat**	**Flat above ground floor**	**Total**	**N**
Salford HMR (5)	5	26	36	1	3	8	21	100	34144
Salford (5)	9	36	30	5	1	6	13	100	95406

Notes:

- The categories maisonette and bed-sit have been merged into one category. Survey 5 also had a category, caravan/mobile home, but no households in either the HMR area or Salford as a whole indicated this was their property type.

Salford HMR has considerably more terraced houses than Salford as a whole. Over one in five households in the Salford HMR occupy a flat above ground floor level, compared with only 13 per cent in Salford.

c) Number of bedrooms								
	One	**Two**	**Three**	**Four**	**More than four**	**None**	**Total**	**N**
Salford HMR (5)	14	38	37	8	2	1	100	34144
Salford (5)	11	31	46	9	2	0	100	95406

Properties within the Salford HMR area tend to be smaller than properties in Salford as a whole. 38 per cent of properties in the HMR area have two bedrooms, compared with 31 per cent in Salford. The proportion of households who have one ore two bedrooms is 52 per cent for Salford HMR and 44 per cent for Salford respectively.

C 2.3 Ethnicity

TABLE C 3 ETHNICITY

Ethnic group.																		
	White British	**White Irish**	**White other**	**White and Black Caribbean**	**White and Black African**	**White and Asian**	**Any other mixed background**	**Chinese**	**Caribbean**	**African**	**Any other Black background**	**Indian**	**Pakistani**	**Bangladeshi**	**Any other Asian background**	**Other ethnic group**	**Total**	**N**
Manchester HMR (1)	68.7	4.3	1.9	0.4	0.3	0.1	0.4	1.0	4.8	3.0	1.5	2.8	4.9	2.0	2.0	2.1	100.0	1640
Manchester (1)	73.0	3.6	1.9	0.5	0.3	0.2	0.4	0.9	3.5	2.6	1.6	2.2	3.5	1.7	2.2	1.7	100.0	3662
Manchester HMR (2)	72.1	5.0	2.4	0.4	0.7	0.0	0.6	0.8	2.8	3.0	1.2	1.0	6.6	1.1	0.6	1.7	100	824
Manchester (2)	79.0	3.7	2.5	0.6	0.3	0.3	0.3	0.6	2.0	1.7	0.7	1.4	4.2	0.5	0.8	1.3	100	1874
Manchester HMR (3)	80.7	5.9	-	0.5	0.1 *	0.7	-	0.5	2.4	3.1	-	1.4	3.7	1.0	-	-	100	1527
Manchester (3)	79.8	5.9	-	0.6	0.5 *	0.6	-	0.7	3.1	2.5	-	1.6	3.8	1.1	-	-	100	3207
East Manchester (4)	87.5	3.5	0.6	0.7	0.1	0.2	0.3	0.8	0.8	2.0	1.0	0.1	0.4	0.0	0.5	1.3	100	987
Salford HMR (5)	90.6	3.1	3.0	0.2	0.1	0.3	0.1	0.4	0.3	0.5	0.1	0.4	0.6	0.0	0.2	0.1	100	34144
Salford (5)	94.7	1.8	1.6	0.1	0.1	0.2	0.1	0.2	0.1	0.2	0.0	0.3	0.3	0.0	0.2	0.1	100	95406

- In survey 3 there is no category "White and Black African", however there was the category "White and Black"

Survey 1 suggests that the Manchester HMR has a larger proportion of groups denoted as White Irish, Chinese, Caribbean, African, Indian, Pakistani, Bangladeshi and 'other' than Manchester as a whole. Of these ethnic groups, the largest difference between the two areas lies between the proportion of Pakistani households, with the HMR area including 4.9 percent, whereas the proportion for Manchester overall is 3.5 per cent. In the HMR area the largest ethnic group after White British is Pakistani, closely followed by Caribbean, whereas in Manchester generally, the second largest group is White Irish. In survey 3, on the other hand, the only groups which constitute a larger fraction of the population of Manchester HMR, compared with Manchester as a whole, are White, Asians, and African. Survey 3 is the only survey of the three which claims that the HMR has a larger proportion of White British households than Manchester as a whole.

In New East Manchester the largest ethnic groups after White British were White Irish, African, and other ethnic group. Both Salford and Salford HMR areas have a higher proportion of White British (90.6% and 94.7%) compared to Manchester as a whole (around 80%).

C 2.4 Working Status

TABLE C4 WORKING STATUS

Working status.						
	Employee in full-time job (30 hours plus per week)	**Employee in part-time job (under 30 hours per week)**	**Self employed full or part-time**	**Full-time education at school, college or university**	**Unemployed and available for work**	**Permanently sick/disabled**
Manchester HMR (1)	26	6	3	5	4	11
Manchester (1)	28	7	4	4	3	10
Manchester HMR (2)	35	7	5	5	4	13
Manchester (2)	39	7	5	4	3	11
Salford HMR (5)	35 *	9	4	8	4 *	12
Salford (5)	39 *	9	4	6	3 *	10

	Wholly retired from work	**Looking after the home**	**Doing something else**	**No answer**	**Total**	**N**
Manchester HMR (1)	25	7	1	10	100	1831
Manchester (1)	26	6	1	10	100	3995
Manchester HMR (2)	18	7	1	4	100	824
Manchester (2)	19	6	1	4	100	1874
Salford HMR (5)	20	5	3 *	-	100	47394
Salford (5)	23	4	2 *	-	100	138965

Notes:

- Survey 5 asked whether people were in a full-time job. It did not restrict that to 30+ hrs per week. The categories self-employed full time and self-employed part time have been merged into self employed. The value in the column corresponding to unemployed and available to work, actually, for survey 5 indicates the percentage of unemployed seeking employment. For survey 5, the figures in the column corresponding to "doing something else" actually shows the proportion unemployed but not seeking work.

In Manchester and Salford, it appears that a smaller proportion of respondents in the HMR area are full-time employees compared to Manchester and Salford as a whole. The HMR areas appear to have a slightly larger proportion of respondents who are in full-time education. The proportion of respondents in part-time jobs is approximately a quarter of the proportion in full-time employment. 13 per cent and 11 per cent of respondents, in Manchester HMR and Manchester, respectively, are permanently sick or disabled. The proportion of respondents who are wholly retired from work is slightly higher in Manchester (and Salford) as a whole than Manchester (and Salford) HMR areas. Surveys 1, 2 and 5 suggest that three to four per cent of respondents are unemployed, and around four per cent are self-employed.

b) Work status of respondents of working age

	Employed 1-15 hrs/week	Employed 16-30 hrs/week	Employed 31+ hrs/week	Self-employed 31+ hrs/week	Registered unemployed	Not working, at school, etc	Total	N
East Manchester (4)	3	12	24	1	30	30	100	710

- Self employed 1-15 hrs/week and self-employed 15-30 hrs/wk are excluded, as 0%.

In East Manchester 30 per cent of respondents were registered unemployed, with a further 30 per cent not working or at school. However around a quarter of respondents work 31 or more hours per week. Only one per cent of respondents are self-employed.

c) Employment

	In work or education	Unemployed/ Not working	Unable to work	Total	N
Manchester HMR (3)	51	13	37	100	1514
Manchester (3)	52	13	35	100	3193

Survey 3 suggests that, in both the HMR area of Manchester and Manchester as a whole, 37 per cent and 35 per cent, respectively, are unable to work and a further 13 per cent are unemployed or not working.

C3 Residence and Mobility

C3.1 Residence

The surveys generally include two questions about residence: how long the household has lived in the area and how long they have lived in their current accommodation.

TABLE C5

a) Time in area.										
	Under 1 year	**1-2 years**	**3-5 years**	**6-10 years**	**11-20 years**	**Over 21 years**	**Don't know**	**No answer**	**Total**	**N**
Manchester HMR (1)	6	7	11	11	15	42	1	7	100	1831
Manchester (1)	5	7	12	10	15	44	1	6	100	3995
Manchester HMR (2)	6	10	14	14	17	37	1	2	100	824
Manchester (2)	5	9	14	13	17	40	0	2	100	1874
Manchester HMR (3)	6	7	12	12	17	46	1	-	100	1536
Manchester (3)	5	7	13	12	17	44	1	-	100	3253

All three surveys suggest five or six per cent of respondents have lived in the area for less than a year. Two of the Manchester surveys suggest a slightly smaller percentage of respondents have lived in the area for over 21 years in HMR areas compared to Manchester as a whole, but survey 3 suggests the opposite. Nevertheless all three surveys show that the majority of respondents have lived in the area for around forty years.

b) Time at current residence										
	Under 1 year	**1-2 years**	**3-5 years**	**6-10 years**	**11-20 years**	**Over 21 years**	**Don't know**	**No answer**	**Total**	**N**
Manchester HMR (1)	10	12	15	13	16	26	1	6	100	1831
Manchester (1)	10	11	15	13	17	28	1	6	100	3995
Manchester HMR (2)	10	14	20	14	18	22	0	2	100	824
Manchester (2)	10	12	18	14	19	24	0	2	100	1874
Manchester HMR (3)	8	12	18	15	19	28	1	-	100	1545
Manchester (3)	9	11	18	15	19	28	1	-	100	3264
East Manchester (4)	15	12	13 *	18 *	41 *		-	-	100	995
Salford HMR (5)	8	9	17 *	15 *	22 *	29 *	-	-	100	34144
Salford (5)	7	8	16 *	14 *	21 *	34 *	-	-	100	95406

Notes:

- In surveys 2 and 3, the don't know option is labelled don't know/can't remember.
- Survey 4 gives different breakdowns, under 1 year, 1 -2 years, 3 -4 years, 5 -9 years, 10 years +, so the figures with asterisks next to them do not exactly fit the time bracket. Hence 13 per cent represents the percentage of respondents who have lived in their current accommodation for 3-4 years, 18 per cent for 5-9 years and 41 per cent for 10+ years.
- Similarly, survey 5 gave the options: less than 1 year, between 1 and 2 years, between 2 and 3 years, between 3 and 4 years, between 4 and 5 years, between 5 and 10 years, between 10 and 20 years, over 20 years. Therefore, 17 per cent represents the sum of the 3rd, 4th and 5th categories, whilst 15 per cent represents the percentage of households who have lived in their current residence for between 5 and 10 years.

15 per cent of East Manchester respondents have lived in their property for less than a year. This is double the percentage for Salford HMR and Salford as a whole. Salford HMR and Salford have a smaller proportion of respondents, 9 per cent and 8 per cent respectively, who have been at their current residence for 1 -2 years compared to Manchester surveys, which were typically around 12 per cent. The residency profile of Salford HMR respondents is fairly consistent with that of respondents from Salford as a whole, although Salford has slightly more long term residents. Similarly, none of the Manchester surveys recorded any major differences in the length of time residents had lived in their current accommodation between the Manchester HMR area and Manchester.

d) Intend to move within the next year

Intend to move				
	Yes	No	Total	N
East Manchester (4)	26	74	100	131
Salford HMR (5)	10	90	100	34170
Salford (5)	9	91	100	95453

Notes:

- Using the two surveys it is difficult to compare answers concerning intentions to move. Survey 5 does not give a time-frame for moving home- it just gives the percentage of respondents who indicated that they intend to move home in the next year. Survey 4 initially asked whether respondents planned to move from their present home. 26 per cent of the 991 respondents said they did plan to move. Those who did intend to move were then asked their time-frame for moving home. By aggregating the categories "In the next 3 months", "Between 3-6 months" and "Between 6-12 months", we can say that 26 percent of respondents to this question plan to move within the coming year. However not all respondents who said they intended to move answered this question, so the sample size is very small, namely 131.

Comparing Salford HMR to Salford as a whole, there is very little difference in the proportion of respondents intending to move within the next year, with around 10 per cent of respondents intending to move. In East Manchester, however, just over a quarter of respondents intend to move home in the next year.

e) Thinking about in three years time do you think you...							
	Own your own home (with or without a mortgage)	Rent from a housing association	Rent from the Council	Rent from a private landlord	Live with family	Total	N
EXPECTED TENURE **Manchester HMR (3)**	59	11	24	4	2	100	1407
Manchester (3)	61	10	22	5	2	100	2985
CURRENT TENURE **Manchester HMR (3)**	51	28	11	8	2	100	1581
Manchester (3)	52	26	11	9	2	100	3321

The first half of the above table shows what respondents believe their tenure will be in three years time, whilst the second shows respondents' current tenure.

There is no major difference between Manchester HMR and Manchester in respondents' expected tenure in three years time. The proportion of respondents who expect to own their own home increases from about 50 per cent now to around 60 per cent in three years time. The proportion of respondents who expect to be renting from the council in three years time, 24 and 22 per cent, implies that the proportion of council tenants will double, rather against national trends. The percentage of respondents who rent from a housing association falls from 28 per cent in the Manchester HMR area to just over 10 percent. In Manchester as a whole the percentage of respondents who rent from a housing association drops, but not so dramatically, from 26 per cent to 10 per cent. The percentage living with their family is constant between the two time periods and across the two areas.

C 4 Satisfaction with Neighbourhood and Home

TABLE C 6 Satisfaction wIth Neighbourhood

a) Satisfaction with neighbourhood as a place to live.									
	Very satisfied	**Fairly satisfied**	**Neither satisfied nor dissatisfied**	**Fairly dissatisfied**	**Very dissatisfied**	**Don't know**	**No answer**	**Total**	**N**
Manchester HMR (1)	9	46	17	12	10	1	4	100	1831
Manchester (1)	13	48	16	11	7	0	4	100	3995
Manchester HMR (3)	14	49	18	13	6	-	-	100	1581
Manchester (3)	16	50	16	13	5	-	-	100	3327
East Manchester (4)	11	47	15	20	6	-	-	100	994
Salford HMR (5)	19	44	20	11	6	-	-	100	34144
Salford (5)	25	45	18	8	4	-	-	100	95406

Notes:

- Survey 1 asked about "Satisfaction with neighbourhood as a place to live".
- Survey 3 asked "How satisfied are you with your neighbourhood as a pla.....".
- Survey 4 asked about "Overall satisfaction with neighbourhood".
- Survey 5 asked about "Satisfaction with neighbourhood".

Respondents in HMR areas were less satisfied with their neighbourhoods than the corresponding areas as a whole. Indeed, the above table shows considerable variation between different areas more generally, as respondents in both the East Manchester and the Salford HMR were considerably more dissatisfied with their neighbourhood than in Salford as whole. Over a quarter of respondents in East Manchester stated they were dissatisfied or very dissatisfied with their neighbourhood, compared with 17per cent and 12 per cent for Salford HMR and Salford respectively.

At the other end of the scale, whereas a quarter of respondents in Salford were very satisfied with their neighbourhood, only 9 per cent and 11 per cent in Manchester HMR and East Manchester respectively were very satisfied. Salford HMR was between these extremes, with 19 per cent very satisfied. East Manchester had a slightly larger percentage of respondents who were neither satisfied nor dissatisfied than Salford as a whole, whilst Salford HMR had slightly more.

Survey 2 did not include a question about satisfaction with neighbourhood, but it did ask households how they felt about their neighbourhood.

b) Feel about your neighbourhood								
	I speak highly without being asked	**I speak highly if I am asked about it**	**I have no views one way or the other**	**I am critical if I am asked about it**	**I am critical without being asked**	**Not stated**	**Total**	**N**
Manchester HMR (2)	13	28	11	29	12	7	100	824
Manchester (2)	16	32	11	24	10	7	100	1874

41 per cent of respondents in the Manchester HMR area were critical about their neighbourhood, compared with 34 per cent in Manchester as a whole. Almost half of respondents in Manchester as a whole claimed they spoke highly of their neighbourhood, compared with 41 per cent of respondents in the Manchester HMR area. In both areas around 10 per cent were indifferent.

c) How satisfied are you with your home?							
	Very satisfied	**Fairly satisfied**	**Neither satisfied nor dissatisfied**	**Fairly dissatisfied**	**Very dissatisfied**	**Total**	**N**
Manchester HMR (3)	39	43	9	6	3	100	1577
Manchester (3)	38	44	9	6	3	100	3333
East Manchester (4)	25	57	6	8	4	99	983

Notes:

- Survey 4 asked about overall satisfaction with accommodation.

In both Manchester and Manchester HMR just under 40 per cent of respondents were very satisfied with their home. There is little difference between the HMR area and Manchester as a whole for this question.

d) Safety in your neighbourhood								
	Very safe	**Fairly safe**	**A bit unsafe**	**Very unsafe**	**Don't know**	**Not stated**	**Total**	**N**
Manchester HMR (2)	4	43	34	11	1	6	100	824
Manchester (2)	5	49	32	7	1	6	100	1874

11 per cent of respondents in the Manchester HMR area felt very unsafe in their neighbourhood, compared with seven per cent for Manchester as a whole. Indeed 54 per cent of respondents in Manchester felt either very safe or fairly safe, whereas in Manchester HMR only 47 per cent selected these two options. The proportion of respondents who felt a bit unsafe is fairly similar in both areas, namely around a third of respondents.

e) Thinking about your area as a whole, would you say it is?						
	Very safe	**Quite safe**	**Not really safe**	**Not safe at all**	**Total**	**N**
Manchester HMR (3)	2	52	35	10	100	1584
Manchester (3)	2	54	35	9	100	3327

Households in the Manchester HMR area gave similar answers to those in Manchester as a whole. Only two per cent felt very safe in both areas and only just over a half reported feeling quite safe in their area.

f) How safe residents feel walking in the area after dark						
	Very safe	**Fairly safe**	**A little unsafe**	**Very Unsafe**	**Total**	**N**
East Manchester (4)	9	33	29	29	100	986

Survey 4 asked in particular about safety walking in the area after dark. Just under 60 per cent of respondents felt either a little unsafe or very unsafe, with only 9 per cent feeling very safe.

D. ANALYSIS OF NDC HOUSEHOLD SURVEY FINDINGS

Executive Summary

Drawing on data from recently conducted household surveys for the NDC National Evaluation, this section examines the characteristics of residents in the East Manchester and Charleston and Lower Kersal NDC areas, highlights their housing circumstances, explores their attitudes towards their residential environment and examines patterns of household mobility.

A number of noteworthy findings have emerged from this analysis:

- *Both East Manchester and Charleston and Lower Kersal have significant BME populations. This is particularly the case in East Manchester, where nearly a quarter of the population are from ethnic minority groups.*

- *In both NDCs areas, nearly half of the local population are economically inactive and more than half are not in paid work.*

- *Most residents – i.e. nine out of ten - in both areas were satisfied with their accommodation.*

- *A quarter of residents in both NDC areas are not satisfied with their area as a place to live. However, in both areas more residents felt that the area was improving than deteriorating and the gap between perceptions was most marked in East Manchester, where half of the local population felt that the area had improved in the last two years compared to only 22% of residents who felt that the opposite was true.*

- *30% of residents in East Manchester, and 23% of residents in Charleston and Lower Kersal, think that run down or boarded-up properties are a serious problem in their area.*

- *Broadly in line with their counterparts in other NDC areas, most residents in both NDC areas felt that they could not influence decisions in their local area.*

- *There is some, albeit limited, evidence to suggest that the improvements being undertaken in both areas are having a positive impact on housing demand. The improvements appeared to have been a ‘pull’ factor for 15% of recent incomers to the area, while 11 of the 26 residents who reported in 2004 that they would be staying in the area, despite indicating in 2002 an intention to move, in part attributed their decision to this factor.*

- *More than a third of residents in both areas reported that they wanted to move from the current property and 29% in East Manchester, and 27% in Charleston and Lower Kersal, thought that they would indeed move home in the next two years. However, a significant proportion in both areas (44% in East Manchester and 38% in Charleston and Lower Kersal) said that they would be moving to another property elsewhere in the neighbourhood.*

- *While both NDC areas have populations that have lived in the area for a relatively short time – in both areas nearly one in ten residents have lived in the area for less than a year – long term residents make up more than half of the total population. 55% of respondents in East Manchester had lived in the area for more than ten years, while 51% of residents in Charleston and Lower Kersal had done the same.*

D1. The Characteristics of Residents and their Housing Circumstances

The Manchester and Salford housing market renewal area is home to two New Deal for Communities (NDC) areas: East Manchester NDC and Charleston and Lower Kersal NDC. As part of the national evaluation of the NDC programme, which is being led by the Centre for Regional Economic and Social Research (CRESR) at Sheffield Hallam University, the programmes in both areas have been subject to rigorous policy evaluation and a number of surveys have been undertaken in the two areas.

The most important source has been the household survey that was undertaken in both areas in 2002 and 2004 as part of a national survey of NDC residents. The surveys followed similar formats: in each NDC area a minimum of 500 residents were interviewed and in all some 19,500 residents were interviewed across the country. Residents were asked a number of questions relating to the five key themes of the NDC programme: crime, worklessness, health, education, and housing and the physical environment.

This section focuses on the latter theme and explores the housing circumstances, attitudes, perceptions and intentions of residents in East Manchester and Charleston and Lower Kersal NDC areas. It refers to data collected from the most recent household survey, which was undertaken by the market research companies MORI and NOP in the summer of 2004. To locate the data gleaned from East Manchester and Charleston and Lower Kersal within a broader context, the report highlights the results derived for three other samples:

- the NDC aggregate sample. This comprises the 19,633 residents interviewed across England in 39 NDC areas.

- National comparator area sample. This comprises 2,113 residents interviewed across the country in *policy-off* deprived areas in order to gain an insight into the 'additionality' of the NDC programme.

- North-west (NW) Comparator area sample. This is composed of the 331 residents in the comparator sample who were resident in the North-west Region.

This section highlights some of the key characteristics of residents living in the two NDC areas and reviews their housing circumstances. The next examines respondents’ attitudes towards their residential environment, while the final section explores the issue of household mobility.

D 1.1. Household Composition

Over a fifth of respondent households are single person households in Manchester NDC. This is somewhat larger than the percentage of single person households in Salford NDC (16%), which is more in line with the NDC Aggregate and Comparator Aggregate. Similarly Manchester NDC also has a considerably larger percentage of lone parent households than either Salford NDC, NDC Aggregate, North West Comparator and certainly the Comparator Aggregate. Both Manchester and Salford NDCs have a slightly smaller percentage of couples with dependents than the NDC Aggregate and in both over a quarter of households comprise couples with no children- again slightly more than the NDC Aggregate.

Table D 1 – Household Type

	Household type						
	Couple no children	Couple with dependents	Lone parent	Single Person	Large adult	All	N
Manchester NDC	26	18	15	21	19	100	509
Salford NDC	30	17	10	16	27	100	501
NDC Aggregate	25	24	11	17	23	100	19633
Comparator Aggregate	29	25	9	16	20	100	4048
NW Comparator	31	25	12	18	14	100	623

D 1.2. Economic Status

Manchester NDC has a higher percentage of respondents not in paid work than either the Salford NDC or the NDC Aggregate, as only 42% are in paid work. But the percentage of respondents not in paid work in the area is comparable with the North West Comparator area.

Table D 2. – In Paid Work

	In paid work?			
	Not in paid work	In paid work	All	N
Manchester NDC	58	42	100	509
Salford NDC	53	47	100	501
NDC Aggregate	56	44	100	19633
Comparator Aggregate	53	47	100	4048
NW Comparator	59	41	100	623

The percentage of economically active respondents in Manchester and Salford NDCs do not differ greatly: 52% and 54% respectively. They are both slightly higher than the North West Comparator.

Table D3. – Economic Activity and Inactivity

	Economic activity			
	Economically inactive	**Economically active**	**All**	**N**
Manchester NDC	48	52	100	509
Salford NDC	46	54	100	501
NDC Aggregate	48	52	100	19633
Comparator Aggregate	46	54	100	4048
NW Comparator	52	48	100	623

D 1.3. Tenure

70% of respondents in Manchester NDC rent their accommodation and 14% own it outright. Thus, compared to Salford NDC, which itself has a larger percentage than the Comparator areas, a larger proportion are tenants. However Salford NDC has a similar percentage of accommodation that is owned outright to the comparator percentage, namely 21%. The percentage of respondents who are buying their property with the help of a mortgage or loan is 13% for Manchester NDC compared to 21% for Salford NDC. However, both are smaller than the North West Comparator area.

Table D 4. Housing Tenure (1)

	Rent it	**Own it outright**	**Buying it with the help of a mortgage or loan**	**Other**	**All**	**N**
Manchester NDC	70	14	13	3	100	509
Salford NDC	56	21	21	2	100	501
NDC Aggregate	64	16	18	2	100	19633
Comparator Aggregate	51	22	25	2	100	4048
NW Comparator	53	20	26	2	100	623

Over half of respondents in Manchester NDC are social tenants, compared to 40% in Salford NDC and the North West Comparator. Compared with the North West Comparator area and the Comparator Aggregate, a much smaller percentage of respondents in Manchester NDC are owner occupiers, namely 32% as opposed to 50%. The percentage of private renters in Manchester NDC (12%) is the same as in NDC areas as a whole as well as comparator areas as a whole. In Salford NDC, almost a fifth of respondents were private renters.

Table D 5. Housing Tenure (2)

	Housing tenure					
	Owner occupier	**Social sector renter**	**Private renter**	**Other/not stated**	**All**	**N**
Manchester NDC	32	55	12	0	100	509
Salford NDC	40	40	19	1	100	501
NDC Aggregate	37	50	12	1	100	19633
Comparator Aggregate	51	36	12	1	100	4048
NW Comparator	50	40	9	2	100	623

In Salford NDC around two thirds of respondents have the local authority as their landlord. This is over twice that of Manchester NDC and more than Comparator areas. In Manchester NDC over half of respondents have a housing association as their landlord, compared with 6% in Salford NDC and 21% as the NDC Aggregate. Around a fifth of Salford NDC respondents have a private landlord, whereas for Manchester NDC this is only the case for 13%.

Table D .6. Type of Landlord

	Type of Landlord						
	Local authority	**Housing Association**	**Trust/ company**	**Private landlord**	**Other**	**All**	**N**
Manchester NDC	29	53	1	13	5	100	369
Salford NDC	67	6	4	19	3	100	288
NDC Aggregate	61	21	3	13	3	100	19633
Comparator Aggregate	54	20	4	19	3	100	2113
NW Comparator	56	22	5	16	1	100	331

D 2. Attitudes towards the Residential Environment

D 2.1. Satisfaction with state of repair of home

Households in Manchester and Salford NDC areas are less dissatisfied with the state of repair of their homes than the NDC Aggregate. 18% and 19% of respondents in Manchester and Salford NDCs respectively were dissatisfied with the state of repair of their home.

Table D 7. Satisfaction with state of repair of home

And could you tell me how satisfied you are with the state of repair of your home?					
	Satisfied	**Dissatisfied**	**Neither satisfied nor dissatisfied**	**All**	**N**
Manchester NDC	77	18	6	100	509
Salford NDC	75	19	6	100	501
NDC Aggregate	71	23	6	100	19633
Comparator Aggregate	77	17	6	100	4048
NW Comparator	79	17	4	100	623

D 2.2. Satisfaction with accommodation

Satisfaction with accommodation is largely the same in both the Manchester and Salford NDC areas (87%, 88%) and is slightly higher than the NDC Aggregate (82%)

Table D 8. Satisfaction with accommodation

Taking everything into account, how satisfied are you with this accommodation?					
	Satisfied	**Dissatisfied**	**Neither satisfied nor dissatisfied**	**All**	**N**
Manchester NDC	87	11	2	100	509
Salford NDC	88	9	3	100	501
NDC Aggregate	82	13	4	100	19633
Comparator Aggregate	88	8	3	100	4048
NW Comparator	89	8	2	100	623

D 2.3. Satisfaction with Landlord

79% of respondents in Manchester NDC are satisfied with their landlord which is a higher percentage than those in Salford, 73%, and the North West Comparator

Area. The percentage of households dissatisfied with their landlord in Manchester NDC is half that of the NDC Aggregate.

Table D 9 Satisfaction with landlord

And taking everything into account, how satisfied are you with your landlord?						
	Satisfied	**Dissatisfied**	**Neither satisfied nor dissatisfied**	**Don't know**	**All**	**N**
Manchester NDC	79	10	8	3	100	342
Salford NDC	73	19	5	3	100	300
NDC Aggregate	67	20	10	2	100	12229
Comparator Aggregate	71	17	9	2	100	1963
NW Comparator	69	17	9	4	100	301

D 2.4. Satisfaction with area as a place to live

Two thirds of respondents in Manchester NDC were satisfied with the area as a place to live compared to 60% in Salford NDC and 71% in Comparator Aggregate. Around a quarter of respondents were dissatisfied with the Manchester and Salford NDC areas as places to live, which is slightly more than the North West Comparator.

Table D 10 Satisfaction with area as a place to live

How satisfied are you with this area as a place to live?					
	Satisfied	**Dissatisfied**	**Neither satisfied nor dissatisfied**	**All**	**N**
Manchester NDC	66	25	9	100	509
Salford NDC	60	24	15	100	501
NDC Aggregate	66	24	10	100	19633
Comparator Aggregate	71	21	9	100	4048
NW Comparator	69	23	8	100	623

D 2.5. Quality of Life

Respondents were asked the following question:

If we were to define 'quality of life' as how you feel overall about your life, including your standard of living, your surroundings, friendships and how you feel day-to-day, how would you rate your quality of life?

Quality of life was rated as good by 77% of respondents in Salford NDC compared to 81% of respondents in Manchester NDC. Hence quality of life was rated higher than the NDC aggregate in Manchester NDC, but marginally lower in Salford NDC. However the percentage of respondents who rated their quality of life as good in the two NDC areas is not as high as in either the Comparator Aggregate or North West Comparator.

Table D 11 Quality of Life

	Quality of life					
	Good	**Bad**	**Neither good nor bad**	**Don't know**	**All**	**N**
Manchester NDC	81	8	11	0	100	509
Salford NDC	77	6	16	1	100	501
NDC Aggregate	78	8	13	0	100	19633
Comparator Aggregate	83	6	11	0	100	4048
NW Comparator	85	7	8	0	100	623

D 2.6. Neighbourhood trajectory

Respondents were asked the following question:

Do you think that over the past two years this area has got better or worse to live in, or haven't things changed much?

Twice as many respondents in Manchester NDC thought the area had become a much better place to live in the past two years compared to the NDC aggregate. Also, only 8% of respondents in Manchester NDC believed that the area had got much worse, compared to 13% in Salford NDC. The percentage of respondents who thought the area had got slightly better is roughly the same between the two NDC areas and only marginally higher than the NDC Aggregate percentage (29%). The percentage of respondents who thought the area had got slightly worse, 14% and 15% for Manchester and Salford NDCs respectively, was marginally higher than the NDC Aggregate but slightly less than either the Comparator Aggregate or North West Comparator percentages.

Table D12. Neighbourhood trajectory

Do you think that over the past two years this area has got better or worse to live in, or haven't things changed much?								
	Area got much better	**Area got slightly better**	**Area not changed much**	**Area got slightly worse**	**Area got much worse**	**Don't know**	**All**	**N**
Manchester NDC	18	32	27	14	8	1	100	423
Salford NDC	6	30	37	15	13	0	100	358
NDC Aggregate	9	29	40	12	10	1	100	15772
Comparator Aggregate	4	22	46	17	11	1	100	3258
NW Comparator	5	23	41	16	15	0	100	541

D 2.7. Problems in the area: Run down or boarded up properties

30% of respondents in Manchester NDC thought run down or boarded up properties were a serious problem. This is twice the NDC Aggregate percentage and much larger than comparator areas. Similarly almost a quarter of respondents in Salford NDC thought it was a serious problem, a further 26% describing it as a problem, but not a 'serious' problem. In both NDC areas half of respondents did not think run down or boarded up properties were a problem.

Table D 13 ***Problems in the area: Run down or boarded up properties***

Could you tell me whether each of these is a problem in this area? Run down or boarded up properties						
	A serious problem	**A problem, but not serious**	**Not a problem**	**Don't know**	**All**	**N**
Manchester NDC	30	20	50	0	100	509
Salford NDC	23	26	50	1	100	501
NDC Aggregate	15	19	65	2	100	19633
Comparator Aggregate	7	17	74	2	100	4048
NW Comparator	12	19	68	1	100	623

D 2.8. Extent to which residents feel that they can influence decisions taken in their area

Respondents were asked the following question:

Do you feel you can influence decisions that affect your area?

The percentage of respondents in Manchester NDC who felt that they could influence decisions that affected their area (25%) was marginally greater than the NDC Aggregate (24%). However in Salford NDC the percentage (22%) was slightly below the NDC Aggregate and more in line with the Comparator Aggregate.

Table D 14 Influence over the decision making process

Do you feel you can influence decisions that affect your area?					
	Yes	**No**	**Don't know**	**All**	**N**
Manchester NDC	25	69	7	100	509
Salford NDC	22	68	10	100	501
NDC Aggregate	24	67	9	100	19633
Comparator Aggregate	22	69	9	100	4048
NW Comparator	20	74	6	100	623

D 3. Household Mobility

D 3.1. Length of residence

The number of residents who have lived in the area for less than a year is fairly consistent between all areas at just under 10%, with the exception of the NW Comparator (4%). However, Salford has a larger percentage of residents who have lived in the area for between one and three years, namely 17% as opposed to around 10%.

Table D 15. Length of residence

	Length of residence in area							
	Less than a year	1 year but less than 3 years	3 years but less than 5 years	5 years but less than 10 years	10 years but less than 20 years	20 years or more	All	N
Manchester NDC	9	10	9	16	14	41	100	506
Salford NDC	8	17	10	13	12	39	100	495
NDC Aggregate	8	11	11	16	19	35	100	19448
Comparator Aggregate	9	10	8	12	19	42	100	3957
NW Comparator	4	6	7	9	21	54	100	610

D 3.2 Reasons for moving to the area

Respondents were asked the following question:

To what extent, if at all, were you attracted to this area by any improvements that have happened here recently?

According to over half of respondents in the Manchester and Salford NDC areas[1] recent improvements were not a factor which attracted people to the area. Indeed the percentage of respondents who were attracted to the area a great deal by recent improvements is only 4% and 3% for Manchester and Salford NDC and the NDC Comparator respectively.

[1] Because the numbers of respondents who were asked this question in the two areas was relatively small, the results from the two areas have been combined.

Table D 16. Impact of improvements on decision to move to area

To what extent, if at all, were you attracted to this area by any improvements that have happened here recently?								
	A great deal	**A fair amount**	**Not very much**	**Not at all**	**No choice of area/did not want to move to area**	**Other**	**All**	**N**
Manchester and Salford NDC areas	4	11	13	56	10	5	100	105
NDC Aggregate	3	14	13	49	17	5	100	2590
Comparator Aggregate	2	13	15	52	11	7	100	533
NW Comparator	0	16	13	54	16	1	100	39

D 3.3. Location of Previous Home

Respondents were asked the following question:

Can I just check, is your previous home within around 15 minutes walk of your current home or is it further away?

A greater percentage of households in the Manchester and Salford NDC areas are likely to have only moved 15 minutes walk away from their previous home, compared to the NDC Aggregate, where only a third are within 15 minutes walk.[2] However, the percentages for Manchester and Salford NDCs are almost the same as the North West Comparator region, at around 43%.

Table D 17. Location of Previous Home

	Location of previous home				
	Within 15 minutes walk	**Further away**	**Don't know**	**All**	**N**
Manchester Salford NDC	43	56	1	100	91
NDC Aggregate	33	66	2	100	1940
Comparator Aggregate	32	67	2	100	529
NW Comparator	42	57	1	100	72

[2] *Again, the sample size was very small for this question, so the Manchester NDC and Salford NDC areas are grouped together. However, it should be noted that even with this amalgamation the sample size is still small and thus the results should be treated with some caution.*

D 3.5. Frequency of movement

Over 10% of respondents in Salford NDC who have moved in the last five years have moved five or more times. This is around twice the number in Manchester NDC and the North West Comparator. Over a quarter of respondents in Manchester NDC have moved three times in the last five years compared to 10% in Salford NDC and 16% in the NDC Aggregate. 45% and 39% of respondents, for Manchester and Salford NDCs respectively, had only moved once in the last five years. This is a considerably smaller percentage of respondents compared to the North West Comparator area (61%).

Table D 18. Number of times moved home in last five years

How many times have you moved home in the last five years?								
	1	**2**	**3**	**4**	**5+**	**Don't know/not stated**	**All**	**N**
Manchester NDC	45	22	26	2	5	1	100	140
Salford NDC	39	38	10	3	11	0	100	177
NDC Aggregate	43	23	16	7	8	2	100	5228
Comparator Aggregate	47	24	11	9	6	3	100	1287
NW Comparator	61	17	11	4	5	2	100	165

D 3.6. Do you want to move from this property?

Households in Salford NDC are slightly less likely to want to move from their property than households in Manchester NDC. 38% in Manchester NDC want to move compared to 30% in the North West Comparator.

Table D 19. Do you want to move from this property?

Do you want to move from this property?				
	Yes	**No**	**All**	**N**
Manchester NDC	38	62	100	509
Salford NDC	34	66	100	501
NDC Aggregate	38	62	100	19633
Comparator Aggregate	31	69	100	4048
NW Comparator	30	70	100	623

D 3.7. Likelihood of moving

Respondents were asked the following question:

Do you think you will move from this property in the next two years?

18% of respondents in the Salford NDC think they will move from their property within the next year, compared to 10% of respondents in Manchester NDC, 11% for the NDC Aggregate and 9% for the Comparator Aggregate and North West Aggregate. The percentage of respondents who thought they would move from their property in the next two years but did not know when is about the same in both the NDC areas we are considering but about double that of the North West Comparator.

Table D 20 - Likelihood of Moving

	Do you think you will move from this property in the next two years?							
	Within next 6 months	**Yes, over 6 months and up to a year from now**	**Yes, over a year and up to 2 years from now**	**Yes, but, don't know when**	**No**	**Don't know**	**All**	**N**
Manchester NDC	7	3	4	15	59	12	100	509
Salford NDC	9	9	5	14	56	8	100	501
NDC Aggregate	6	5	7	14	59	9	100	19633
Comparator Aggregate	5	4	6	11	65	9	100	4048
NW Comparator	5	4	5	7	71	8	100	623

D 3.8. Impact of improvements on future housing intentions

Respondents who indicated in 2002 that they were likely to move were asked the following question:

Last time we interviewed you in 2002, you said that you thought you would move from this property within the next two years. To what extent, if at all, has your decision to stay been affected by any improvements that have happened here recently?

It would appear that improvements in the Manchester and Salford NDCs are influencing households' decision to stay in the area a great deal. 44% of respondents claimed their decision to stay was influenced either a great deal or a fair amount by the improvements which had taken place, whereas in the NDC Aggregate, and the Comparator Aggregate, a very small percentage of respondents felt improvements had influenced their decision a great deal. Indeed in the North West Comparator 90% of respondents said that improvements had had not influenced their decision to stay in the area at all. However one should note that the sample size for this question is very small.

Table D 21 Impact of improvements

Last time we interviewed you in 2002, you said that you thought you would move from this property within the next two years. To what extent, if at all, has your decision to stay been affected by any improvements that have happened here recently?							
	A great deal	**A fair amount**	**Not very much**	**None at all**	**Don't know/not stated**	**All**	**N**
Manchester Salford NDC	12	32	8	35	12	100	26
NDC Aggregate	8	17	15	49	11	100	801
Comparator Aggregate	2	22	16	60	0	100	62
NW Comparator	0	10	0	90	0	100	10

D 3.9. Likely destination of out-movers

Compared to the NDC Aggregate, and both Comparator percentages, a much higher percentage of respondents in Manchester NDC (44%) thought they would move to somewhere within 15 minutes of their current home. Similarly, 38% of respondents in Salford NDC thought they would stay in the area when they move. In both NDC areas 21% of respondents thought they would move to somewhere else in the city. This is somewhat smaller than the NDC aggregate (28%), but higher than the North West Comparator (16%). Also, compared to the NDC Aggregate, Comparator Aggregate and North West Comparator, a smaller percentage of respondents in the Manchester and Salford NDCs thought they would move either elsewhere in the UK or outside the UK.

Table D 22. Likely destination of out-movers

	Where do you think you will move to?							
	Stay in the area (within 15 minutes walk of current home)	**A neighbouring area**	**Elsewhere in this city/ town**	**Elsewhere in the UK**	**Elsewhere outside the UK**	**Don't know**	**All**	**N**
Manchester NDC	44	13	21	10	4	8	100	146
Salford NDC	38	20	21	10	3	8	100	185
NDC Aggregate	24	18	28	17	5	8	100	6279
Comparator Aggregate	21	20	24	22	5	8	100	1050
NW Comparator	24	27	16	18	8	7	100	126

E. KEY FINDINGS FROM THE MSP RESIDENT PERCEPTIONS HOUSEHOLD SURVEY

Introduction

This chapter contains key findings from the MSP Resident Perceptions Household Survey (MSP RPHS), which was undertaken by CSR Survey (fieldwork) and ECOTEC (analysis of findings) during June and July 2005. When designing the RPHS survey, some of the key questions from the National NDC Evaluation survey were integrated into the questionnaire in order to provide a degree of comparability. Where this was possible RPHS findings have been compared and contrasted against those from NDC comparitor areas. Findings have been broken down into the following broad categories:

- Satisfaction with property and key characteristics.
- Satisfaction with the local area.
- The future movement of residents.
- Respondent characteristics.

This chapter concludes with a section (E5) which compares key findings from RPHS with those from the resident perception focus groups (section B). Through this process of comparative analysis it is possible to shed further light on the key issues for HMR.

E1. Satisfaction with Property and Key Characteristics

This section concerns resident's satisfaction with property, as well as key property characteristics e.g. house type, tenures and ownership levels within the pathfinder area, and also details of previous property.

Encouragingly, most pathfinder respondents (87%) were satisfied (very or fairly) with their current property, as were respondents in the NDC comparator areas. Satisfaction levels were lowest amongst those in flats and private renters, although this is only relatively speaking as over 80% of these groups indicated they were satisfied. Dissatisfaction mainly arose from the poor condition of property, although, overall, most respondents (83%) were satisfied with the state of repair of their property. Pathfinder respondents who rent are generally more satisfied (77% overall) with their landlord than those respondents in the NDC comparator areas.

Looking at the pathfinder by housing type it was possible to identify that half of respondents presently live in a terrace, 85% of which have less than 3 bedrooms. Well over half (57%) of those in terraced accommodation rent, although this figure is still substantially lower than in flats, where the majority rent (93%). Respondents living in terraces are also more likely to have lived in their property for 10+ years compared to other types, this is also true of length of time in their neighbourhood and in Manchester/Salford.

The number of respondents currently living in terraced properties is slightly less when compared to the type of property they previously lived in. This is perhaps indicative of the changing aspirations of respondents. An assumption subsequently borne out (see emerging households and the future for more details) where more respondents said they would prefer not to move in to a terrace property next time. It is also possible to observe this when looking at residents who live in semis, where the proportion has risen by 9% (from 16% to 25%); similarly home ownership has risen by 19% (from 18% to 37%).

The survey results show that respondents tend to live longer in their neighbourhood compared to their current property. For instance, while nearly half of respondents have been in their property for less than 5 years, 42% report to have lived in their neighbourhood for 20 years or longer, and 65% to have lived in the area (i.e. Manchester or Salford) for at least 20 years or all their life. Results from the survey show that only 28% of respondents have moved neighbourhood in the last 5 years or less, and even less (16%) have moved area in the last 5 years This would indicate that pathfinder respondents tend to keep their changes in address 'contained' within certain geographical parameters i.e. their neighbourhood and the Manchester/Salford area.

Also the fact that pathfinder respondents are more likely to have stayed within 15 minutes of their previous property than those in the NDC comparator areas only serves to strengthen this theory.

Looking at rental levels, most respondents in the pathfinder rent from the Local Authority (LA), although LA rental levels are lower than in the NDC comparator areas. Interestingly, pathfinder respondents tend to be more strongly represented by Housing Associations and Private Landlords than in the NDC comparator areas.

Only a minority of owner occupiers in the pathfinder area paid more than £75,000 for their property, with half paying £50,000 or less. However it should be noted that one-third of respondents purchased their property prior to 1990 when house prices were much lower than present prices, with the majority buying their property through a mortgage/loan. A large proportion of respondents were unaware of the current value of their property.

The largest proportion of respondents chose their current property, solely on the property itself, however, when asked whether property or area is most important when choosing a home the largest proportion (41%) believed them to be equally important. The reasons for respondent's last move (to their current property) were most commonly for property reasons[3] (31%), or personal reasons[4] (30%).

[3] E.g. Larger or smaller home or garden.
[4] E.g. Family reasons.

E2. Satisfaction with the Local Area

Similar to property, this section looks at resident satisfaction levels, although this time focussing on the local area. This section also delves deeper into the issues that concern residents, as well as perceptions and fears of crime and other social issues.

Overall, almost three-quarters of all respondents (74%) were satisfied with the local area as a place to live, slightly higher than found in the NDC comparator areas. Levels of dissatisfaction with the local area are highly correlated with length of time in home, (i.e. the longer respondents have lived in their home the more likely they are to be dissatisfied with the area). This is borne out by respondents who had lived in their current property for 20+ years, where less than two-thirds were satisfied with the local area as a place to live.

Overall, only 22% of respondents who had lived in the area for 2+ years felt that the local area had changed for the better in the last two years. The biggest proportion (44%) felt they were unable to see any changes what-so-ever during the last 2 years. Also when compared to the NDC comparator areas, pathfinder respondents appear to be much less positive about the changes in their local area. This perhaps reflects the achievements made under NDC, compared to HMR, which is still comparatively new.

Crime and safety came up as the main reason 'why' respondents felt an area had improved or declined in the last 2 years, indicating this is an important barometer of change for residents in the pathfinder area. Crime and anti-social behaviour was also the main problem respondents wanted to see change in the local area over the next 2 years.

Kinship ties (29%) were the binding factor for respondents living in an area, this was true across age and ethnicity, especially so for Asian respondents (35%). Property was the next most common reason given for living in an area (14%), a reasons that is highly correlated with age (i.e. property becomes more important with age).

Asian respondents came out top when asked how attached they were to their neighbourhood (73%), while overall, the vast majority (86%) of respondents found their neighbours friendly. Just short of two-thirds of all respondents said they knew most people in their neighbourhood, with a similar number vouching for their neighbours when asked whether people look out for each other. This figure was highest amongst respondents in terraced and semi-detached properties and lowest amongst those in flats. Unemployed respondents were most likely to agree that there is a 'live and let live' attitude in their neighbourhood, in comparison to employed and inactive respondents, overall, two-thirds (66%) of respondents agreed with the statement.

When asked their views on housing and other social issues, the one area where most respondents were in agreement was affordability. Four out of five respondents (85% overall) felt that local housing was affordable. When asked about the property movements of local residents, those in the social rented sector were most likely to agree that people were leaving the area, although this only accounted for one-third of this group. Nearly half of all owner occupiers disagreed that there is not enough choice in local housing. The only other issues to bring any real sense of accord were on feeling isolated and cut off from the wider area (60% disagreed) and the area is good for families to live in (over half agreed).

When questioned on their perceptions of particular problems in their neighbourhood, litter and rubbish in the streets (26%), and problems with teenagers (37%) were the issues that brought about the strongest feelings. Looking at particular groups it is evident that respondents in semi-detached properties were most likely to agree that the local area was safer than most other places (38%), while almost half of those in flats disagreed (48%), suggesting a link between property type and perceptions of safety. Overall, those in flats were most likely to cite a problem as serious in their neighbourhood.

The crimes respondents are most worried about (i.e. those around the 50% mark) include having their home burgled, anti-social behaviour and feeling unsafe after dark. Below that are fears of vandalism and graffiti, drug related crime and maybe somewhat surprisingly respondents rated fear of being physically assaulted in the second bracket above worries about having their car broken into. However, in reality, nearly three quarters of respondents have not been the victim of any crime in the last 5 years.

E3. The Future Movement of Residents

This section of the report looks beyond the immediate, focussing on resident's future intentions/ambitions to move by property, tenure and location. This section also focuses on barriers to movement and emerging households i.e. members of resident households looking to move out in the near future, as well as at likely student property movements in the near future.

When asked about future moves the majority (72%) of respondents indicated they have 'no plans' to move in the near future. However the majority of those who are planning a move expect to do so in the next 2 years, with almost one-third hoping to move in the next 6 months.
Looking across housing types those presently living in flats were most likely to want to move, while the majority of respondents who intend to move in the next 2 years, stated they would like a three or four bedroom house. Emerging households i.e. those members looking to move out, represented less than 5% of respondent households overall.

Looking at the student population in more detail, slightly more student respondents said that they moved into Manchester/Salford to study (54%) than respondents who said they were already living in Manchester/Salford (46%). When asked about futures moves almost half of all students said they would consider staying in Manchester/Salford on completion of their studies.

When asked about barriers to moving, unsurprisingly the top response given by respondents who wanted to move was one of financial constraint (35%). The main reason respondents wanted to move was for area related reasons (37%). However the majority of respondents said they would take into account area as well as property next time they move (56%).

When prompted for extra details, the largest proportion of respondents (29%) said they intended to buy their next property. The same proportion stated that they intend to rent their next property from the council. Of those looking to buy their next property, the biggest proportion who gave a price (14%) said they were looking to pay £100,000+, while properties with 3 bedrooms (40%) were most desired, as were semis (38%). Most respondents would prefer not to move into a property of the same tenure next time they move (60%). One-third of respondents (33%) wanting to move said they would like their next property to be within 15 minutes walk of the current one.

When asked about locations (for future moves) the highest concentration of positive responses were in areas such as Crumpsall and Cheetham in North Manchester (15% and 11% respectively said 'yes' they would consider moving to these areas). However, the single most positive response was for Salford Quays (16% said yes). The least positive responses were in South Manchester, with areas such as Moss Side and Rusholme proving least popular.

Those respondents who do not intend to move in the next 2 years (i.e. the majority) were asked to imagine if they did what type and tenure they would like, as well as how they would occupy it. The largest proportion of respondents said they hoped to purchase their next property, however, in reality the greatest proportion of respondents are likely to continue to rent. While over half said they would probably stay in the same tenure, and almost half said they would probably stay in the same type.
When asked to think slightly longer term, the largest proportion (29%) of respondents said they would probably stay within central Manchester/Salford in the next 10 years. Also the same percentage of respondents did not expect that any changes that might occur over the next 10 years would necessitate a move out of the area.

E4. Respondent Characteristics

This section has been provided in order to set key findings on property, the local area and future moves into context. For example, providing an insight into the age, ethnicity and economic status of the pathfinder residents involved in the survey. This section also documents that a representative sample of residents living in the pathfinder area was achieved.

With regard to gender an almost 50:50 balance was achieved in the sample, while in terms of ethnicity a representative balance was achieved with just over four-fifths of respondents White, and the rest of respondents consisting of Black and other Ethnic Minority groups. When compared to Manchester and Salford NDC areas, there appears to be slightly more ethnic diversity in the pathfinder area as a whole, however, the pathfinder is slightly less ethnically diverse when compared to the National NDC aggregate. The majority of respondents (87%) indicated that English was their mother tongue, although three quarter of those who indicated it was not, said they spoke English well.

Respondents were asked about the length of time they had lived in their current property, the neighbourhood and more widely Manchester/Salford. From this it was possible to gauge whether respondents were long standing residents or whether they were relatively new in-movers. Results suggest that pathfinder respondents are less mobile than respondents in Manchester or Salford's NDC areas, particularly so when compared to Salford NDC. For instance, almost half (61%) of pathfinder respondents have lived in the same area for 10 years or longer, compared to just over half (51%) in Salford NDC. However, overall, the same percentage of pathfinder respondents have lived in the area for 10 years or more as have respondents in the NDC Aggregate.

Looking at household characteristics it was possible to identify that almost three-quarters of respondent households consisted of 3 or less people, with a quarter of respondents living in single person households. While just under half (45%) of all respondents were married.

Half of working age respondents are in employment, while just over one-third of all respondents (36%) indicated their household is workless. The variation in economic activity rates between the pathfinder and NDC comparator areas was not significant.

The biggest proportion of respondents in employment worked in Elementary Occupations (i.e. those with a trade, cleaners, shelf fillers, security guards etc). A significant finding is that managers and Senior Officials and Professional occupations account for only 10% of pathfinder respondents. Many respondents were reluctant to disclose information on weekly earnings, although of those who did a quarter brought in less than £200 per week.

E5. Comparative analysis with other resident research

A series of targeted focus group discussions were held in various parts of the MSP HMR area, and covering different household groups. These have been reported more extensively in a report drawing on various sources of evidence to present an integrated account of perceptions, aspirations and intentions. Broadly, the content of these discussions concurred with findings from this survey. In particular:

- ► Social and environmental issues emerged in both datasets as apparently having a greater influence on household satisfaction, quality of life and mobility than property related issues. Household survey respondents, for example, were generally satisfied with their current property, felt that housing in their area was affordable and few reported poor housing conditions. Focus group respondents also raised very few issues or concerns about their current homes. Instead, the presence of kinship and community ties featured heavily in both groups' motivations for moving to, or remaining in, their neighbourhood, and dissatisfaction centred on issues such levels of crime and anti-social behaviour, the poor quality of the environment (litter, rubbish), the quality of local schools, and the presence of other 'undesirable' residents. In addition, when asked why they wanted to move, area-related and personal reasons (for example, the quality of the area, local facilities, to escape young people's behaviour and a lack of community spirit in the case of focus group respondents) were more commonly provided by both survey and focus group respondents.

- ► Both datasets suggest that future rates of (imminent) mobility are potentially high. Over one quarter (28 per cent) of household survey respondents expressed a desire to move and most reported an intention to do so within the next six months, while a high proportion of focus group respondents also expressed a desire to move. Some differences were, however, apparent on this issue. Results from the household survey suggest that many residents in the HMR area who are seeking to move are likely to do so within the neighbourhood: 33 per cent wanted to move within a 15 minute walk of their current home. Focus group respondents wishing to move, on the other hand, said they were driven by a desire to leave the neighbourhood and escape problems of crime, anti-social behaviour, drug dealing and so on they reported encountering on a daily basis. There was a consensus, however, that financial considerations were the main constraint preventing residents from acting on their aspirations.

- ► The views of focus group respondents diverged somewhat from survey respondents with regard to changes which had occurred in the area. Most commonly, survey respondents felt the area had not changed much in the past two years. In contrast, focus group respondents had noticed a wide range of demographic, physical and social changes, including: visual improvements and dramatic physical transformation of some areas; increased new housing development and conversions; a more 'cosmopolitan' feel to some neighbourhoods; increased provision of leisure and shopping facilities; changing population profile (growth of the student population in some areas, an increase in transient households in others, and of minority ethnic and new immigrant populations in others); a decline in the 'sense of community'; and increased gang activity and anti-social behaviour.

► In addition, the survey results suggest that residents do not feel positively about recent changes in their area. At first sight, it would seem that focus group participants talked positively about the impact of the investment which had been made across the city. They pointed to the City Centre as 'classy', 'happening', and cosmopolitan, appreciated the dramatic physical transformation of Hulme and improved aesthetic appeal of other neighbourhoods, acknowledged the positive effects of tenure diversification (for example in Cheetham Hill) and expressed the view that regeneration efforts had attracted new businesses, shops and facilities. However, while focus group respondents felt these changes were positive for 'Manchester and Salford' as a whole, there was a strong sense in which respondents felt 'unconnected' to many of these improvements. It was as if the transformation was happening around them, rather than feeling integral to the processes of change. In some cases, they felt quite negative, or had reservations, about the impact of changes on them and the local community.

In particular, focus group respondents:

► Questioned the extent to which they were benefiting from regeneration activity, expressing the view that many of the improvements - for example new housing developments, shops, leisure facilities, bars and so on - were 'not for them' but for young people, the affluent, and tourists.

► Felt that regeneration activity in their local area was designed primarily to attract new residents rather than with the needs of local people in mind.

► Felt that many improvements were superficial only and questioned the priorities of regeneration activity - for example improving the visual attractiveness of an area rather than addressing the key concerns of residents about crime and anti-social behaviour.

- ► Pointed to some of the potentially negative consequences of leisure and shopping developments in terms of the effect on small local businesses which were reported to be closing.

These are important elements in terms of the future transformation of the Manchester Salford HMR area. It suggests that continuing attention must be paid to residents' engagement with the whole process, so they feel that they are not merely passive observers, but active participants. It also suggests that a tightrope must be walked between attracting new households and creating more mixed communities, on one hand, and dealing with the potentially exclusionary effects of 'gentrification' on the other. It requires, in short, careful management of market dynamics, so that upwards swings do not simply intensify problems of affordability for households currently resident in the area.

F. INVESTOR PERCPETIONS

As part of this report we have given consideration to the perceptions held by investors in the pathfinder area. Views have been taken from two sources; the first from a series of interviews undertaken with investors and secondly from consideration of the emerging findings of the River Irwell Corridor: Strategic and Transportation Planning Study.

F1. Interviews with stakeholders

In total 28 stakeholders were contacted, on the basis of local knowledge, suggestions by Pathfinder officers, previous work undertaken by Chris Allen of CRESR on city centre living and responses to the November Housing Strategy conference convened by Manchester City Council. Five of the contacts did not respond to repeated requests for interview, a further three refused to be interviewed, three did not have residential developments in their portfolio and one respondent did not have any developments in the Manchester Salford area. Of the sixteen responses made, nine were from developers/investors, five from estate agents or managing agents and two from development consultants with knowledge and experience of the Manchester Salford housing market.

Market Trends in Central Manchester

Although it lies outside the boundaries of the HMR, it is impossible to ignore the impact of the transformed Manchester city centre housing market on the sub-region as a whole. In 1981, fewer than 600 people lived in the heart of Manchester. By 2003, over 20,000 people were estimated to reside in the city centre/Salford Quays area alone (MSP Prospectus 2003). However, recently this trend of rapid growth and expansion had steadied. Over the past year it was widely agreed that, in the pithy words of one respondent – 'the higher the price, the worse the market'. The lower end of the market in Manchester city centre had performed most strongly, with estimated increases of 5-10 per cent in the year. Prices for middle range property (£150-200k) had increased by around 5 per cent but prices for properties at the high end (above £200k) had reached a plateau or started to fall in the past six months.

One respondent said they had been dealing in 8-10 resales of high value city centre apartments per week in June and July 2004 but this had now tailed off to virtually nothing. Much of this was put down to the increase in interest rates in September 2004, following hard on the heels on the previous increase. Reference was made to a specific block where the asking price of new apartments had fallen from £244,950 in mid-2004 to £217,000 early 2005. Another referred to the price of a £215k apartment receiving bids of £200k, only for both to be subsequently withdrawn. In this market segment, one respondent was involved in 30 sites in central Manchester, which were now facing stiff competition from 3 bed roomed properties in Didsbury, Chorlton and other areas with good access to Cheshire, as well as some properties in parts of north Manchester.

In terms of rental values, a typical rent for a one bedroomed apartment in central Manchester was £650 a month, rising to £1,200 a month at the top end, though these figures were now proving difficult to sustain. One ongoing problem was the lack of amenities such as late night shopping close to the blocks. The provision of secure parking space was also seen as an important advantage in high/mid-market (>£150k) blocks. One respondent claimed that intending purchasers from London were less inclined to see the benefits of city centre living as, in relative terms, Cheshire was accessible enough to the centre, compared to similar areas on the outskirts of London. These factors may well grow in significance given the impending relocation, from London, of staff from the BBC, as well as some Whitehall civil servants.

Some respondents suggested that first time buyers had virtually given up trying to gain a foothold in the central Manchester market and had in many cases decided to continue renting, and hope for a future fall in interest rates and a market downturn. Other groups, such as parents of students, were also starting to defer purchase. The introduction of tuition fees from Autumn 2006 may have a further dampening affect on this sector. In terms of rented property, the student market was holding up, with rents rising to around the £60 a week mark in some cases.

Outer Markets in Manchester Salford

In the periphery of central Manchester (the Quays, Trinity Riverside, Hulme) the market was strong – ease of access to the city centre without reliance on transport was seen as the most important factor here. This is seen as a positive, and sustainable, spill-over from recent pressures on the central core.

The prospects for areas beyond the city centre were considered to be more volatile sector. One respondent said that ‘you only need one investor to express interest in an area and other developers follow on quickly; but predicting who and when someone would take that first step was difficult. The visual appearance of the locality, an integrated approach to service delivery and good quality infrastructural development were all viewed as crucial. There were still some large sites going ahead (one of 20 acres and one of 10 were cited) solely for owner-occupation, but at the lower end, the provision of mixed housing developments gave a positive market signal to attract further investment.

Developers were cautious about the prospects for several sub-markets outside the central core (including North Manchester, Moss Side and parts of Salford). According to one respondent, low rise development was popular virtually everywhere - including Rochdale Road, other parts of North Manchester, Cheetham Hill and Kearsley. It was suggested that certain ‘gateways’ were emerging to connect some of the renewal areas to the relative buoyancy of the city centre, but the picture was mixed and uncertain. Properties in regeneration areas selling for less than £150k were doing well, because they did not attract stamp duty.

Fewer stakeholders were active in the Salford housing market, though slightly different trends were discerned, with an apparent decrease of 2% in asking prices for property in Swinton, local first time buyer territory, though with some increase among £90k properties and, as discussed later, in Langworthy. 60 per cent of the market in Salford was in the <£100k price band and, according to one respondent, invariably overpriced. Sellers tended to hold out for a better price, and many buyers lost out in they were in a chain. This stakeholder also claimed that 80 per cent of the property he handled was vacant at the time of sale, as the vendors had already moved on

One crucial sign of an improving market was the involvement of Urban Splash. This was seen as a landmark in rendering parts of Langworthy and Ancoats as falling within the range of first time buyers and commuters, coupled with positive spill-over from the central core. Stamp duty exemption was also encouraging more interest in property selling at below £150k in regeneration areas.

Set against this, it was difficult to counteract the effects of blight in areas such as Charlestown, Higher Broughton and Langworthy. Most investors were aware that you had to have owned property for twelve months to qualify for compensation. Changes of local authority policy on clearance were seen as frustrating the interests of buyers and sellers alike, but one respondent acknowledged that complete clarity about the future clearance programme could simply encourage speculative investment, and render the whole process more expensive.

Areas such as Beswick and Ardwick were viewed as potential beneficiaries of the 'Hulme effect' in which market sustainability was achieved as a result of prior sustained intervention and public sector support for neighbourhood remodelling. Hulme now had an attractive rental market, with returns of around 7 per cent, and had witnessed high relative price increases in the past five years. The jury was out, however, on the future of Moss Side. Although its location in South Manchester was a plus point, several respondents referred to the 'image' problem. 'It takes years to change a reputation' was an oft quoted maxim. One respondent said he had personal experience of riots and vandalism to the shopping centre from years ago, but 'would not go back' Other localities evoked contrasting reactions; Moston, for example, was seen as too 'far out' to attract much interest, unless investor activity drove first time buyers out of more and more sub-markets elsewhere in the city.

There would be an inevitable time lag between investment in infrastructure, including transport and the building up of investor confidence, other than the more mercurial asset -oriented activity described below. Manchester City Council's role was seen as vital and their pro-active approach had given developers confidence, as well as easing processes of site assembly and planning. The lingering reluctance of some developers to take on board a genuine partnership approach remained a constraint, as did capacity issues

The Buy to Let Market

The overall consensus was that the rapid and dramatic expansion of the buy to let market in central Manchester is slowing, or even going into reverse. One stakeholder claimed that the market was still on an upward spiral, with speculators able to make £100k on city centre blocks with property bought and sold on 'before it is even out of the ground'. But this was a minority view. One respondent suggested that the lettings market had begun to drop off in early 2004, with rents for one bedroomed apartments falling by £100 to around £500 a month, although he did acknowledge that at the start of 2005 there were signs of a revival. There was thought to be about an even split between national and local investors involved in the sector, with a significant influx from Ireland, notably Dublin, as part of a chain of acquiring and selling assets across Europe, including Eastern Europe. These investors were buying off plan and selling upon completion.

In some cases, the sums were not making BTL a viable proposition; investors needed capital to make it work, as it was claimed that lenders were demanding a minimum initial investment of 15, or even 20, per cent. Outside the city centre, the break up of larger properties into smaller units, in areas such as Broughton, was considered a much better prospect for a good return than, to take one example quoted in interview, the purchase of a £80k terrace in Swinton to be let at £400 per month. Charlestown had also become a popular BTL location, though investors were spending little on subsequent property improvements.

Most respondents thought that the BTL market was fragile, as many current households would move out to the suburbs as the next step, rather than remain within the city itself. Members of the gay community were, it was felt, less likely to move out in this way, though this was more of an assumption than an empirically observed trend. One might ponder how the cultural/lifestyle attractions of city centre living will fare as this community continues to mature. But compared with recent hyperactivity in this sector of the market, one respondent suggested that 'the bubble has burst'.

The Changing Nature of Investment in the Residential Market

Evidence about actual yields from residential property is pretty sparse. This means that most investment/development decisions are made 'blind' or are speculative. One respondent suggested that investors and developers rarely, if ever, undertake any detailed research. Investors/developers rarely 'understand' their markets in the sense of carefully investigating specific elements of the environment. This is partly because the reasons for investing vary considerably, and the most significant factors behind decisions may be *internal* rather that external such as:

- being cash rich;
- the current value of 'assets' on a balance sheet in cash or 'strategic' value
- tax benefits in relation to current accounts (or overseas transactions)

- whether they are long term or short term investors (as a matter of course or in the current position)
- level of current exposure to market change and whether they are prone to take risks or are risk averse;
- for developers, their current levels of capacity, and the impetus to keep skilled labour on the books.

The external factors include:
- type and scale of subsidy available;
- quality of infrastructural development in specific locations;
- perceptions of yield in the market;
- level of investor confidence evidenced by continued new development or single large sales

The point is commonly made that these decisions rarely fit a straightforward pattern and are not necessarily ‘market rational’.

Much of the market for 'investment' in residential property in central Manchester is separate from the dynamics of a normal market is comparatively new. One interviewee claimed that this phenomenon was about five years old.

Many major UK investors are looking to Eastern Europe as an investment location so the domestic market itself is currently attracting inward investment from overseas as there is little internal competition. It was claimed that a sizeable proportion of the money coming into the Manchester residential market came from a comparatively small group of investors based in Ireland. Some of the investments are huge. The second Countryside block at dock 9 (Salford Quays) has been bought in its entirety.

Three respondents claimed that a significant proportion of the city centre stock was not currently acquired for 'living in'. Investors instruct agents to undertake block purchase for them. The agent is therefore responsible for the location decisions as the investor is unlikely to know the city at all. The 'yield' the investor is often looking for is not through rental but through inflation in value. This produces a capital asset on a balance sheet that may be increasing by five to ten per cent a year even when empty. The investor does not have to deal with managing tenanted flats, and the maintenance costs of new and unused stock are minimal. As long as other investors are interested in the market then the value is maintained; if the market begins a downturn, the assets can be sold on.

Much of this investment is also made 'off plan'. For the developer this is ideal, as it saves the time compared to handling a stream of individual or small scale purchases. It can also be a major incentive for developers to get prospective sites on stream quickly while this market is highly active.

Block purchasing allows huge discounts. Many commercial investors can probably afford prices to drop as much as 50 per cent from current levels before they take a ‘hit’. This provides a degree of insulation from short-term market fluctuations, as limited falls in value are unlikely to prompt a flurry of exits by investors. However, it was claimed that the more opportunist ‘smart money’ in property left the Manchester market a year ago. It is difficult to gauge the impact of this particular sector on the overall market. It may not directly contribute to price inflation for households seeking homes (as investors are competing with each other for purchase, not with residents). However, a continuing trend of price falls could provoke a large scale offloading of this stock onto the market, thereby accelerating the deflationary trend.

F2 Emerging findings of the River Irwell Corridor: Strategic and Transportation Planning Study

The report identifies that there are sufficient planning consents in the development pipeline for 5/6 years and notes the risks of an over-supply of city centre apartment flats, at the expense of other property forms and types. RFI research, see section above, suggests that these developments are not obeying the 'normal' laws of supply and demand but were a product of the global movement of liquid assets, which 'touch down' for a period on these new developments in particular cities; as a result the risk of over-supply may be around for some time before there is any tangible slow down in activity in response.

The report also claims correctly that the central Salford residential market is very localised and as a result will prove much more stubborn to shift than more fluid markets in places such as Levenshulme. The overall approach to inch slowly outwards along the arterial routes from Manchester city centre seems sensible. The prospects for some limited diversification of property values and types in the Chapel Street redevelopment may also be promising, though site values may act as a deterrent for developers here.

The study refers to a latent residential market for professional families in the area. This is one of the key challenges for the MSP HMR - can it redirect the mobility paths of city centre dwellers to 'leapfrog' the inner ring (s) when relocating to family property in the city? There may be some opportunities further south on this inner ring, but our evidence suggests that one would not start this process in the Irwell corridor until there has been massive infrastructural investment in the environmental amenity in the area and, especially, in the schools. Education is mentioned, but only in passing; and even the 9 -19 year time horizon for the Cornbrook-centred residential developments in Phase 2 seem optimistic in attracting professional families to move in. Something much more than a promotional campaign on the delights of city centre living will be required: rather an Urban Splash iconic development could affect a bigger impact.

Considerable stress is made on opening up the waterway: but this has proved in some situations much more a feature in apartment block environments than mixed residential areas (e.g. elsewhere in the MSP area, or in a city such as Leeds). The report refers to successful waterside developments in the London and Dublin docklands - but this does not really work as a comparator, as both those cities were on sharply upward economic trajectories (due to stock market mania and EU support respectively) which is not applicable to Manchester in 2005, despite its generally healthy economic outlook. This tends to suggest that the case for getting developers and investors behind HMR proposals is more convincing for the plans to the west of the Manchester city centre, than those to the south west: the River Irwell is being over-sold.

G. Mapping Perceptions against the Future HMR Programme

G1. Introduction

The Scheme Update has been prepared against the rich evidence base acquired through the RFI programme. One element of this work has been to chart the perceptions of residents and investors, and their responses to recent, current and anticipated changes in the housing market. This has often provided a valuable 'reality check' on the viability of proposed future programmes and has informed the assumptions behind likely mobility patterns and investment priorities in the years ahead. Table 1 below brings together the key operational objectives as set out in the Scheme Update, the challenges identified, the links with the evidence base, and some of the additional implications for future investment that arise from this information. It will be important to track how perceptions change over the period covered by the Scheme Update, especially in terms of the propensity to move, the relative desirability of different areas in the HMR for different groups in the community, the impact of HMR and other public and private interventions on area perceptions, and the preparedness of developers and investors to look at new areas in their forward plans.

One means of achieving this aim is through an omnibus Household Survey across the HMR. There is a role for such an approach to establish external validity to other findings, but it is often not the most cost efficient or best targeted approach. We recommend that the 2005 Household Survey is repeated in 2007, in order to provide valuable longitudinal analysis and give some indication of impact of HMR; but this needs to be supplemented by a series of more closely defined surveys and a sequence of focus groups, which have already proved useful in identifying emerging trends, the different priorities of different groups in their 'reading' of the city and the lingering, and tenacious, preconceptions about particular areas - not usually supported by direct observation or experience. The right hand column in Table 1 therefore suggests how the operational objectives in the scheme Update can be tracked. It suggests that relatively small scale, but regular and tightly focused, research exercises are more valuable to map changing perceptions than major but sporadic data gathering exercises. It has the added benefit of reducing research fatigue among respondents, which can be a real issue in those neighbourhoods undergoing the most fundamental transformations.

G2. Mapping Perceptions against the Future HMR Programme

Operational Objective	Challenges	Links with Evidence Base	Implications for Strategy	Future perception and opinion testing
1. To create the conditions for sustained investment in new housing and commercial developments by private sector	Provide opportunities for major rather than small scale new development in HMR	Positive community response to impact of previous major redevelopment Hulme and East Manchester redevelopment (FG) Very positive community response to NDC programme in M/c, reducing outward mobility	Good track record to refer to. Basis of trust in potential for neighbourhood and city centre transformation	Household survey Survey - Investor/Developers Perceptions Collate articles/ letters in the local media regarding new developments (ongoing process?)
	Persuade developers to build houses not just flats	City centre apartment growth not seen as extending options by indigenous households in MSP HMR (FG)	Need to ensure community 'ownership' of new schemes	Detailed housing preference survey and focus groups - indigenous households, recent movers, families and developers
		'Traditional' views about preferred property type (HS)	Support for high density, if neighbourhood conditions are favourable	Focus groups - those wanting to move

Operational Objective	Challenges	Links with Evidence Base	Implications for Strategy	Future perception and opinion testing
		New property was often perceived as being poor quality, small and lacking character (FG) The majority of emerging households would only consider purchasing a newly built property if it was the only option (FG)	Ensure the size, design and quality of new property is appropriate and meets requirements of potential residents.	Focus groups - those wanting to move, students, recent graduates, emerging households
2. To improve the choice and quality of housing, taking account of neighbourhood conditions and market demand	Provide high quality social and private rented sector housing	Council housing associated with lack of choice. Poor quality private rented sector can impair image of areas and depress values (FG)	Promote high standards in PRS and flexibility in social sector	Focus groups - PRS tenants and landlords
	Provide family housing	Too much focus in new developments on 'young professionals' at expense of families (FG)	Broaden the economic/demographic base for inner urban schemes	Focus groups - families
		Concern expressed that new houses were being built next to areas where crime and anti-social behaviour were serious issues (FG)	Tackle underlying social problems in adjoining areas	Focus groups - families

Operational Objective	Challenges	Links with Evidence Base	Implications for Strategy	Future perception and opinion testing
		Residents expressed the need for a range of property sizes, with Levenshulme for example experiencing a shortage of larger properties (FG, HS)	Provide a range of property sizes	Focus groups - families
	Spread urban living out of City centre to E M/c and Salford	'Invisible barriers' between city centre and inner ring (FG)	Think through location of 'next stage' housing options for city dwellers. Improve quality of schools in HMR	Focus groups - city dwellers
3. To increase the number of home owners through the provision of affordable housing and new financial products	Increasing house prices making new developments unaffordable to first time buyers	'Emerging households' frustrated about choices open to them, especially in South M/c (FG)	Need to encourage wider search territories among emergent home owning households	Focus groups - emerging households
		But 85% of pathfinder respondents felt that local property was affordable (HS)		Household survey - targeting pathfinder residents
	Key workers facing difficulties	Fear that regeneration was pricing people out of their area (FG)	Develop affordable housing across neighbourhoods, not in discrete enclaves	Focus groups - key workers
	Low incomes/values making home ownership challenging for many	Desire to stay near family/friends often thwarted by high local prices (FG)	Promote new intermediate forms of low(er) cost home ownership	Focus groups - recent movers

Operational Objective	Challenges	Links with Evidence Base	Implications for Strategy	Future perception and opinion testing
		High proportion of households expect to remain in rented sector in three years time (NDC) Large proportion of residents in East Manchester are registered unemployed (S4)	Identify attitudes to home ownership and whether it is a preferred option for residents with low incomes	Household survey - rented sector Focus groups - tenants
4. To manage neighbourhoods effectively and improve quality, attractiveness and safety of urban environment	Manage neighbourhoods with high levels of transience	Evidence of 'churning' in NDC areas and elsewhere in HMR (NDC, HS, S1-5) The incoming transient populations attracted to NDC areas such as Beswick led to problems (FG) Transient populations tend to fail to maintain properties (FG) Attempts to diversify property designs, types and tenures has not been succeeded in	Community support focused on markets where transience is counterproductive (in some cases, eg. student areas, it is functional) Address reasons for transience and lack of attachment to particular area. Need to ensure mixture of ages in areas	Focus groups - targeted neighbourhoods NDC survey and evaluation Focus groups - transient populations, eg. students Focus groups - in areas such as Wythenshawe where

Operational Objective	Challenges	Links with Evidence Base	Implications for Strategy	Future perception and opinion testing
		changing residents' perceptions of Wythenshawe because LA letting policy is believed to be skewing the age composition of residents in favour of young people (FG)		older residents are moving out due to an influx of young people.
	Focus on neighbourhoods where associated issues such as ASB	Perceptions of ASB as the key factor deterring in-migration to some areas and triggering exits (FG, HS)	Maintain priority given to control of ASB in key neighbourhoods	Focus groups - neighbourhoods associated with issues such as ASB
		In some areas regeneration initiatives were seen as superficial and not seen to be addressing the residents main concerns (FG)		
		Residents felt investment was needed in community facilities and activities, particularly for young people (FG)	Invest in community facilities and schemes to improve the environment	Household survey re local facilities, environmental factors, crime, perceptions of particular areas.
		Residents felt a stronger police presence was needed	Need to ensure residents feel area is safe	

Operational Objective	Challenges	Links with Evidence Base	Implications for Strategy	Future perception and opinion testing
		as community wardens had few enforcement powers (FG)		
		Residents were critical of housing allocation policies (FG)		
		Some areas still perceived as no go areas, for example some parts of South Manchester were perceived negatively by students who were concerned about security and the absence of other student communities (FG)	Building links with student community and the rest of the community	Focus groups - students
		Some residents felt new developments exacerbated segregation and had consequences for areas which had not received equivalent investment (FG)	Ensure investments are distributed across areas of Manchester and Salford.	
		Boarded up properties, lighting and environmental factors played a significant	Environmental factors crucial in determining perceptions.	

Operational Objective	Challenges	Links with Evidence Base	Implications for Strategy	Future perception and opinion testing
		role in determining perceptions of areas (FG, NDC)		
To work with stakeholders to support local, sub-regional and regional strategies	Linking Building Schools for the Future and other funds to MSP investment	Quality of area amenities are more important ‘push’ and ‘pull’ factors than property condition. (FG, HS) Accessibility of area and links with the city centre were issues affecting housing destinations (FG, HS) Suburban centres were perceived to be better in South Manchester (FG) Residents did not think the schools in the city centre were good (FG) Residents in Harpurhey did not feel they had been consulted during the	Leverage potential of HMR funds critical Infrastructural investment must accompany major housing redevelopment Improve perceptions of schools, particularly in city centre Encourage more widespread consultation and resident participation	Focus group stakeholders Household survey of areas where accessibility was deemed to be a problem Household survey re satisfaction with local services, e.g. schools, shops, transport

Operational Objective	Challenges	Links with Evidence Base	Implications for Strategy	Future perception and opinion testing
	Aligning ADP investment	construction of a new college (FG) High design standards (but not necessarily innovative schemes) are important elements in attracting incomers to 'new' neighbourhoods (FG) Most moves are 'locally' oriented (FG,HS)	Need to distinguish characteristics of 'sub-regional' from 'local' movers Increase residents' knowledge of developments across the cities to update perceptions which may be based on out-of-date information or a lack of information	Household survey of recent incomers and small survey of attitudes to particular areas in key feeder areas across the region. Household survey re attitudes to particular areas within Manchester and Salford