

Accessible Report



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Council

Wigan Council

Residential Market Paper

Viability and Deliverability Study

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1 Introduction

- 1.1 This report sets out the evidence which informs the value assumptions made for appraising the residential development typologies set out in the main report. The purpose of this overarching study is to test the viability implications of the upcoming Wigan Borough Local Plan which runs up until 2039.
- 1.2 Our market research is based on existing available evidence and assumptions and conclusions may be subject to change due to the current market uncertainty. We recommend that the conclusions of this report are kept under review.

Executive Summary

- 1.3 This paper includes the following sections:

2) National and Regional Market Overview	Provides an assessment of the current residential market in a National and Regional context.
3) Existing Evidence Base	Provides a review of the existing market evidence from previous studies and reports in respect of Wigan.
4) New Build Achieved Values	Provides an assessment of new build achieved values across Wigan. The market assessment is based on industry recognised published data from the Land Registry and the Energy Performance Certificate (EPC) Register.
5) Housing Value Zones	Based on our market research we set out our Housing Value Zones which will be used to inform our value assumptions. This includes a review of second-hand transactions from the Land Registry as an additional data-set of comparative values.
6) New Build Asking Prices	Provides an assessment of asking prices for new build properties within the Housing Value Zones identified. The market assessment is based on published data from Rightmove/Zoopla and

	developers' websites. Whilst we have placed more weight on the transactional evidence base, we have also considered current asking prices to inform our values.
7) AspinallVerdi Value Assumptions	Based on our assessment of the residential market, we set out our value assumptions for the range of house types and tenures which will be tested in each of the Housing Value Zones. These are the value assumptions that we have carried forward to our viability assessment appraisals.
8) Affordable Housing Transfer Values	Provides a review of existing evidence which will inform our transfer values assumptions for S106 affordable housing.
9) Specialist Accommodation for Older People	This section of the report focuses on the specialist accommodation for older people. We set out a summary of our understanding of the various types of housing for older people and undertake a review of the current market within the area.
10) Build to Rent	This section considers evidence to inform the rental values for the Build to Rent (BTR) accommodation in Wigan. This section refers to evidence from the rented sector in general, where information is specifically related to BTR we explicitly state this.

2 Residential Market Review

National and Regional Market Overview

RICS UK Residential Market Survey

- 2.1 The RICS publishes a regular UK residential market survey¹ providing an overall opinion of the direction that the residential market is taking, along with commentary from surveyors across the regions. The RICS survey is a good early indicator of house price movement, which is later picked up by other indices.
- 2.2 The August 2025 publication (published 9th September 2025) was the latest available at the time of writing this report and it provided the following summary:
- New buyer enquiries fall for a second straight month, with a decline in agreed sales also reported
 - House prices drift lower at the aggregate level
 - Sentiment on the near-term outlook remains cautious
- 2.3 The August 2025 RICS Residential Market Survey indicates a continued slowdown in sales market activity, with most parts of the UK now seeing a decline in the volume of new buyer enquiries coming through
- 2.4 Looking at the new buyer enquiries indicator, the August net balance of -17% marks a further deterioration compared to the reading of -7% returned in the previous iteration of the survey. As such, this measure suggests the fall in buyer demand gathered impetus over the month, with most parts of the UK now seeing a negative trend emerge.
- 2.5 Agreed sales also appeared to fall at a sharper rate than that reported last month, evidenced by the net balance slipping to -24% from -17%. Looking ahead, sales activity is anticipated to remain broadly flat in the coming three months, with a net balance of -2% being registered (marginally weaker than the reading of zero found in the July results).
- 2.6 On the back of the recent weakness in new buyer demand, house prices are reportedly coming under a small degree of downward pressure at the national level.

¹ https://www.rics.org/content/dam/ricsglobal/documents/market-surveys/uk-residential-market-survey/8_WEB_August_2025_RICS_UK_Residential_Market_Survey_tp.pdf

Indeed, the headline house price gauge produced a net balance reading of -19% this month, down from readings of -13% and -7% in each of the two previous monthly reports. Within this, respondents based across East Anglia and the South West of England are citing a more noticeable decline in house prices relative to the national average. To the contrary, survey participants in Northern Ireland continue to report that house prices in their locality remain firmly on an upward trajectory

- 2.7 Going forward, respondents envisage house prices continuing to edge down at the aggregate level over the coming three months. On a twelve-month view, contributors expect house prices to rise marginally, although it is worth noting that the latest net balance of +9% is the least elevated going back to December 2023.
- 2.8 In the lettings market, landlord instructions fell according to a net balance of -37% of respondents. Interestingly, this is the most negative reading dating back to April 2020. With regards to rental price expectations, a net balance of +27% of contributors are of the opinion that rents will increase over the coming three months. Looking ahead to the next twelve months, respondents are pencilling in roughly 3% growth in rents at the national level.

Halifax Monthly House Price Index

- 2.9 In addition to the RICS UK Residential Market Survey, Halifax publishes a monthly house price series with data covering the whole country. In terms of house price growth, the August 2025 Halifax House Price Index² indicates that:
- House prices increased by +0.3% in August, marking a third consecutive monthly rise
 - Average property price now £299,331 compared to £298,237 last month
 - Annual rate of growth +2.2% (down from 2.5% in July)
- Northern Ireland continues to record the strongest annual price growth in the UK

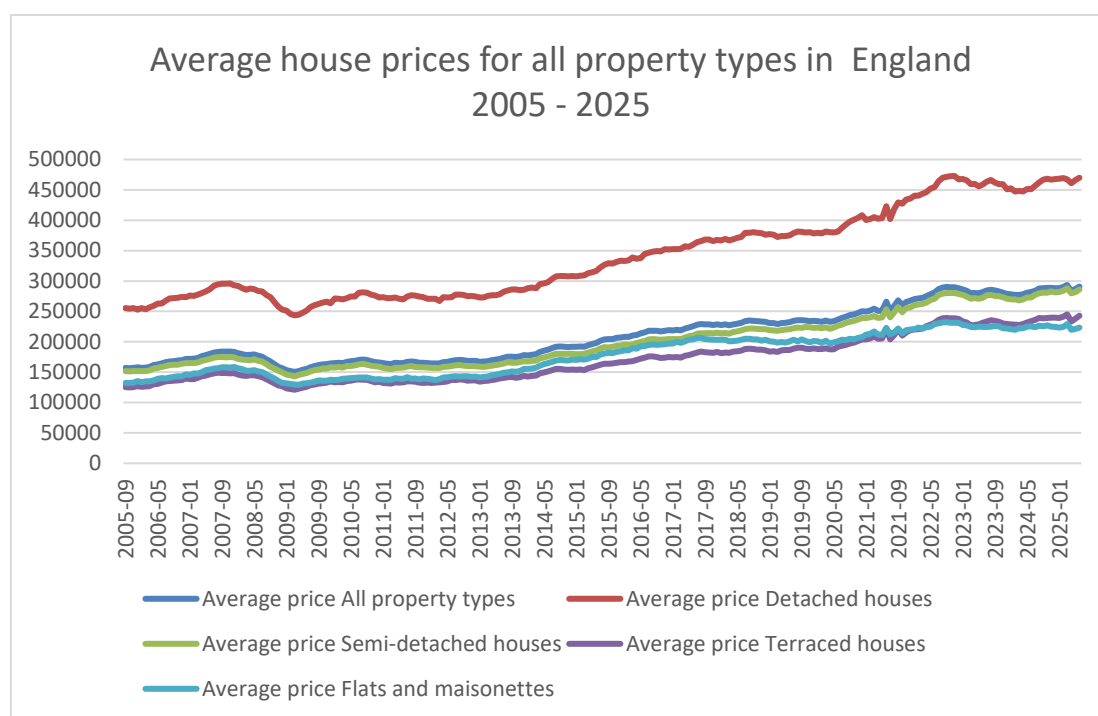
Land Registry House Price Index

- 2.10 Average UK house prices increased by 3.7% to £269,000 in the 12 months to June 2025. The average house price increased to £291,000 in England, £210,000 in Wales

² [august-2025-halifax-house-price-index.pdf](#)

and £192,000 in Scotland. The annual house price inflation remains the highest in the North East with a 7.8% rise in the last 12 months. House price inflation was the lowest in London with a small growth of 0.8%, remaining unchanged from the previous 12 months.

Figure 2.1 – Average House Prices in England for all property types 2005 - 2025



Source: UK House Price Index, September 2025

- 2.11 Figure 2.1 shows house prices for detached houses, semi-detached houses, terraced houses and flats, across England. It also shows the average prices of all properties combined. The graph shows that there was steady growth amongst all property types from 2005 up until 2008, and as a result of the financial crisis, house prices were declining for the following year. However, leading on from this, house prices have increased since 2009 to present, with a slight fluctuation in 2021, as a result of the Covid pandemic, but there were no drastic changes to the market. It is evident that detached houses are the highest in value, whilst terraced houses and flats are amongst the lowest values. There was a stamp duty reduction from July 2020 to September 2021 which could have impacted the fluctuations of house prices in 2021 as shown on the graph. However, house prices have continued to increase from the beginning of 2022 – 2025, despite the temporary relief ending.

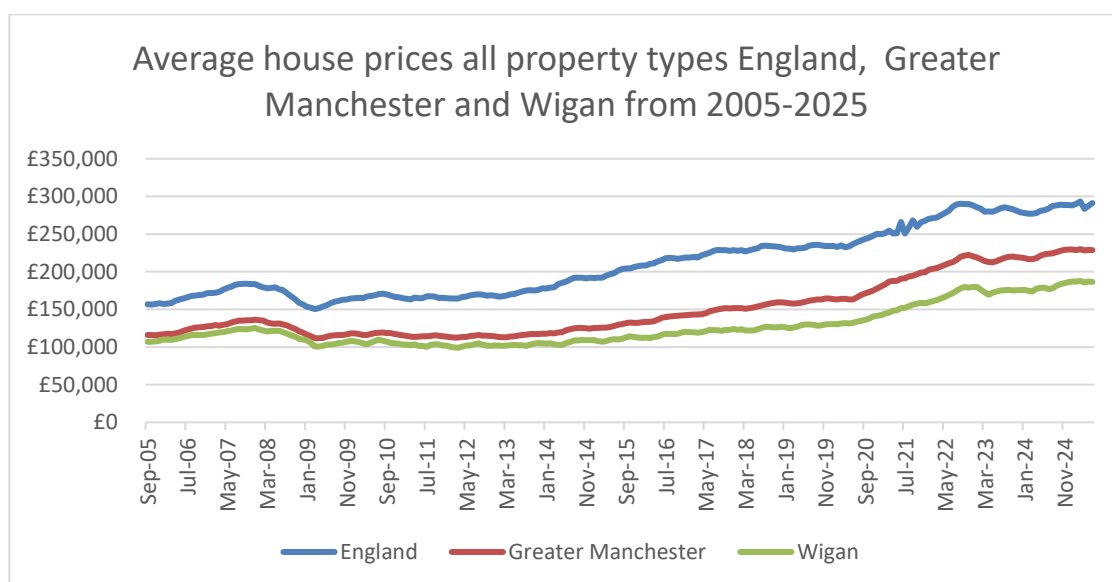
2.12 Average house prices across England per unit type, according to Land Registry's UK House Price Index (June 2025³) are as follows:

- Detached: £470,000
- Semi Detached: £286,000
- Terraced: £243,000
- Flats: £223,000

Source: Land Registry UK House Price Index, September 2025

2.13 To provide further insight into house price data in Wigan and the Greater Manchester region, and how this compares to the rest of England, we have presented the data shown below in Figure 2.2.

Figure 2.2 – Average House Prices Since 2005 (All Property Types) in Wigan, Greater Manchester and England



Source: UK House Price Index, September 2025

2.14 Figure 2.2 shows that average prices in England, Wigan and Greater Manchester follow a similar pattern since 2005. The values for all three areas grow at a steady pace, with a slight dip in 2008 after the financial crisis. This gradually increases from 2009, and there is a noticeable increase in house prices for Wigan and Greater Manchester from 2020-2022. Nationally, average prices are higher than in Wigan and Greater Manchester. Wigan's average house prices were the lower than Greater Manchester house prices, albeit they are very closely aligned from 2005 -2014,

³ UK House Price Index for June 2025 - GOV.UK

Greater Manchester house prices were slightly higher than Wigan house prices from 2015 – 2025.

2.15 Average house prices across all unit types according to the Land Registry UK House Price Index (June 2025) are as follows:

- England: £290,956
- Greater Manchester: £228,852
- Wigan: £186,461

Source: Land Registry, September 2025

Savills UK Housing Market Update September 2025

2.16 Savills published their UK Housing Market Update for September 2025⁴ which comments on the current state of the residential housing market.

2.17 House prices fell by -0.1% in August according to Nationwide. House price growth over the last three months was -0.4%, which has seen annual house price growth slow to 2.3%, down from 2.4% last month. This continues the pattern of decelerating house price growth which has persisted since the SDLT changes in April.

2.18 Affordability continues to improve against this backdrop of uncertainty. The Bank of England Monetary Policy Committee voted to cut the base rate to 4%, its lowest rate since March 2023. In line with base rate cuts, mortgage rates have been gradually trending down, with the average 5-year fixed rate dipping below 5% for the first time since May 2023 in mid-August, according to Moneyfacts.

2.19 More localised house price data from May shows that areas with the greatest value growth were in Scotland and the North. It is a mixed picture in every region, with some areas seeing rises while others experience falls. London shows the most extreme differences with Haringey and Merton having some of the strongest price growth (8.1% and 7.5%), while Kensington & Chelsea and Barnet saw significant falls (-4.3% and -3.9%).

2.20 Annual rental growth across the UK in July was 2.4% according to Zoopla, a slight deceleration from 2.7% in June. This comes despite RICS surveyors reporting an uptick in tenant demand.

⁴ Savills UK | UK Housing Market Update - September 2025

3 Existing Evidence Base

- 3.1 We have undertaken a review of the existing evidence base which comprises the following study:
- Wigan Council – Local Housing Needs Assessment, October 2024
 - Wigan Council – Strategic Housing Land Availability Assessment (Update) April 2024

Wigan Council – Local Housing Needs Assessment (LHNA)

- 3.1 The Wigan Borough Local Housing Needs Assessment (LHNA) 2024 provides the latest available evidence to help to shape the future planning and housing policies of the area. The LHNA provides local evidence which builds upon the 2019 Greater Manchester Strategic Housing Market Assessment. The study will help inform the production of the council's Local Plan and Housing Strategy.
- 3.2 It considers the affordable housing needs of households, the aspirations/expectations of those households moving in the market, and the need for particular types of dwelling by virtue of age or disability. This research provides an up to-date analysis of the social, economic, housing, and demographic situation across the borough.
- 3.3 This study includes the following:
- Reviews national and regional policy context
 - Considers the main features of the housing market and key drivers
 - Reviews current rents, prices and affordability
 - Considers the needs of different groups
 - Overall dwelling type and mix
 - Concludes policy and strategic issues
- 3.2 As of 2023, the average lower quartile house prices were as follows;
- £130,000 in Wigan Borough
 - £157,000 in Greater Manchester
 - £140,000 in the North West
 - £190,000 in England

3.3 As of 2023, the average median house prices were as follows:

- £175,000 in Wigan Borough
- £219,000 in Greater Manchester
- £200,000 in North West
- £290,000 in England

3.4 In 2023, lower quartile rent values were as follows:

- £650 pcm in Wigan Borough
- £849 in Greater Manchester
- £693 in North West
- £923 in England

3.5 In 2023, median rent values were as follows:

- £750 in Wigan Borough
- £1,101 in Greater Manchester
- £901 in North West
- £1,473 in England

3.6 There are 151,815 dwellings (2023 MHCLG) and 143,101 households (2021 Census) across the Borough. The dwelling vacancy rate is estimated to be 2.8% which is similar to the national rate (2.75%). Table 3.1 below shows a breakdown of dwelling stock and household estimate by sub-area within Wigan.

Table 3.1 – Dwelling stock and household estimate by sub-area

Sub-area	Dwellings	Households
Ashton-in-Makerfield & Bryn	10,253	9,924
Atherton	12,986	12,541
Golborne & Lowton	11,432	10,987
Hindley & Abram	18,898	18,223
Leigh	20,206	19,279
Orrell & Winstanley	10,501	10,218
Shevington & Standish	12,075	11,676
Tyldesley & Astley	11,327	10,954
Wigan North & Aspull	23,415	22,163
Wigan South	17,973	17,136
Borough of Wigan	149,066	143,101

Source: Wigan LHNA 2024, 2021 Census

- 3.7 According to the last 2023 Valuation Office Agency, most dwellings are houses (79.7%), 9.5% are flats, and 10.8% are bungalows. 66.4% of households are owner-occupiers, 16.2% privately rent, and 17.5% live in affordable housing (including social/affordable renting and shared ownership). 6.1% of dwellings have one bedroom, 28.2% two bedrooms, 54.2% three bedrooms, and 11.5% four or more bedrooms.
- 3.8 Regarding tenure of households, the 2021 Census reported that 66.4% of occupied households are owner-occupied, 17% are rented from a social housing provider, 16.2% are private rented (including tied accommodation), and 0.5% are shared ownership. Table 3.2 below shows a breakdown of the tenure split across % of owner occupied, % private rented, % affordable.

Table 3.2 – Tenure split by sub-area

Sub-area	% Owner occupied	% Private rented	% Affordable	Total	Total households
Ashton-in-Makerfield & Bryn	73.4%	13.9%	12.7%	100.0%	9,924
Atherton	62.2%	17.5%	20.3%	100.0%	12,541
Golborne & Lowton	73.2%	13.9%	12.9%	100.0%	10,987
Hindley & Abram	65.9%	17.1%	17.0%	100.0%	18,223
Leigh	57.6%	21.7%	20.8%	100.0%	19,279
Orrell & Winstanley	86.2%	8.6%	5.2%	100.0%	10,218
Shevington & Standish	82.4%	10.5%	7.1%	100.0%	11,676
Tyldesley & Astley	73.1%	13.9%	13.0%	100.0%	10,954
Wigan North & Aspull	58.0%	18.8%	23.1%	100.0%	22,163
Wigan South	55.0%	17.2%	27.7%	100.0%	17,136
Borough of Wigan	66.4%	16.2%	17.5%	100.0%	143,101

Source: Wigan LHNA 2024, 2021 Census

- 3.9 Across the owner-occupied sector, 76.2% of dwellings have 3 or more bedrooms; whereas in the rented sector, 59.4% of social rented dwellings and 56.9% of private rented dwellings have 1 or 2 bedrooms. See Table 3.3 below.

Table 3.3 – Dwelling size by tenure

Number of bedrooms	All tenures %	Owned %	Rented: Social rented %	Rented: Private rented or lives rent free %
1 bedroom	6.9%	1.1%	27.0%	10.1%
2 bedrooms	28.2%	22.7%	32.4%	46.8%
3 bedrooms	49.6%	55.2%	38.4%	37.9%
4 or more bedrooms	15.3%	21.0%	2.2%	5.2%
Total	100.0%	100.0%	100.0%	100.0%

- 3.10 19.6% of dwellings were built before 1919, a further 15.4% were built between 1919 and 1944, 17.1% between 1945 and 1964, 22.4% between 1965 and 1982, 11.9% between 1983 and 1999, and 13.5% have been built since 1999. See table 3.2 below which shows the age of dwellings, % built in this time period and the total number this equates to.

Table 3.4 – Age of dwelling

Age of Dwellings	Number	%
pre-1919	29,600	19.6%
1919-44	23,230	15.4%
1945-64	25,810	17.1%
1965-82	33,860	22.4%
1983-99	17,930	11.9%
post 1999	20,420	13.5%
Total	150,850	100.0%

Source: Wigan LHNA 2024, 2021 Census

- 3.11 The population of Wigan is estimated to be 332,245 in 2023 (ONS 2018-based projections) and this is projected to increase by 4.5% to 347,326 by 2041.
- 3.12 The LHNA has carefully considered the future population and household projections over the period 2023 to 2041, the range of dwellings lived in by different households, and their dwelling aspirations (likes) and expectations.

- 3.13 The Greater Manchester Places for Everyone Plan identifies an average overall minimum annual net housing need of 972 dwellings across Wigan, but delivery is to be phased over the period 2022 to 2039 (814 average 2022-25, 972 average 2025-30, and 1,025 average 2030-39). See table 3.5 below.

Table 3.5 – Net annual dwelling requirement

Annual average 2022-39	2022-2025	2025-2030	2030-2039	Total 2022-2039
972	814	972	1,025	16,527

Source: Wigan LHNA 2024, Places for Everyone

- 3.14 There is an annual net shortfall of affordable housing of 283 each year which takes into account underlying need, affordable supply through relets and pipeline supply. The recommended affordable tenure split is 75% social/affordable rented and 25% affordable home ownership. The LHNA analysis includes a detailed analysis of the relationship between households and their current housing circumstances, the future aspirations of moving households, and what households would expect.
- 3.15 Particular needs have been identified for specialist housing for older people within the LHNA. Around 75% of older people want to stay in their home with help and support when needed. However, there is a modelled need for 8,387 more units of accommodation for older people by 2041. This includes sheltered/retirement, extra care, co-housing, and residential care and need is usually considered with reference to planning use classes. C2 class relates to residential accommodation providing care; such as nursing or care home. C3 relates to houses flats or bungalows that are built specifically for older people and can include sheltered and retirement accommodation.
- 3.16 It is estimated there is a need for 6,284 additional C3 dwelling units over the period 2023 to 2041 or 349 each year, a need for 1,528 C2 Extra Care units or 85 each year, and 575 C2 residential care bedspaces or 32 each year. 3.6% of this (35 per year) should be built to Cat M4(3) wheelchair accessible standard and all other new dwellings should be built to M4(2) accessible and adaptable standard, which would include bungalows/level access accommodation.

- 3.17 The latest Regulator of Social Housing Statistical Data Return (SDR) 2022 identified a total of 26,504 units of affordable housing across Wigan Borough. Of these, 23,965 were general needs units, 1,890 were supported housing/ housing for older people. In addition, there were 649 units of low-cost home ownership.
- 3.18 Over the past 12 years (2011/12 to 2022/2023) 11,165 net new dwellings have been built across Wigan district, see table 3.6 below. Over half of which have been built in the five years 2018/19 to 2022/23. In the past 5 years, an annual average of 6,897 net completions has been achieved. Over the past 12 years, the overall shortfall of delivery relative to targets has been 218 dwellings.

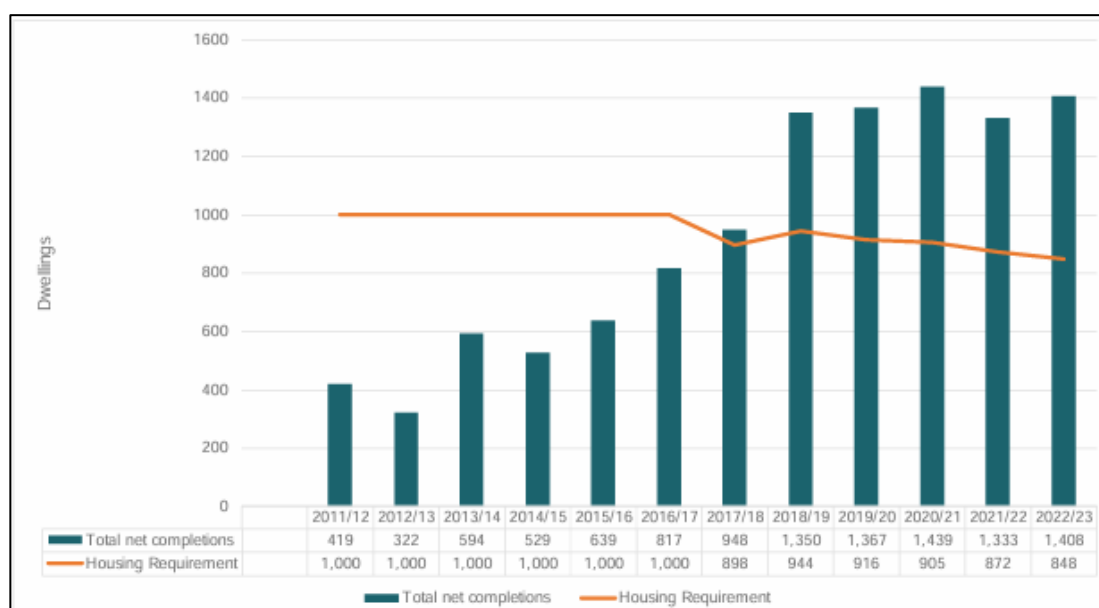
Table 3.6 – Dwelling completions (2011/12 – 2022/2023)

Year	Total net completions	Housing Requirement	Surplus/Deficit against target
2011/12	419	1,000	-581
2012/13	322	1,000	-678
2013/14	594	1,000	-406
2014/15	529	1,000	-471
2015/16	639	1,000	-361
2016/17	817	1,000	-183
2017/18	948	898	50
2018/19	1,350	944	406
2019/20	1,367	916	451
2020/21	1,439	905	534
2021/22	1,333	872	461
2022/23	1,408	848	560
2011-2023 (Total 12 years)	11,165	11,383	-218
Total (most current 5 years)	6,897	4,509	2,388
Annual average (past 5 years)	1,379	897	482

Source: Wigan LHNA 2024, 2021 Census

- 3.19 Additionally, see Figure 3.7 below which shows the comparison of annual completions with annual housing target requirement.

Figure 3.7 – Comparison of annual completions with annual housing target requirement (2011/12 – 2022/23)



Source: Wigan LHNA 2024, Wigan Council Annual Monitoring Returns

- 3.20 The Places for Everyone (PfE) Plan sets out an average net additional housing need for Wigan of 16,527 over the period 2022 to 2039. Regarding affordable homes, Policy JP-H2 sets out that PfE authorities will seek to maximise the delivery of additional affordable homes, including through Local Plans setting targets for the provision of affordable housing for sale and rent as part of market-led developments based on evidence relating to need and viability.
- 3.21 The PfE sets out minimum densities appropriate to accessible locations in the Borough. Outside of these locations a minimum net residential density of 35 dwellings per hectare is generally considered appropriate. For the purpose of our viability testing, we have tested scenarios based on 35 dph.
- 3.22 2018-based projections estimate a population of 332,245 in 2023. This is projected to increase by 4.5% to 347,326 by 2041. The largest increases are expected in the 65-74, 75-84, and 85+ age categories. Given the ageing of the population, the need for specialist older person accommodation is expected to increase. It is estimated there will be a need of the following:
- A need in 2023 for 2,050 C2 residential care bedspaces increasing to 2,787 by 2041. This compares to a current supply of 2,212 bedspaces.

- A need in 2023 for 1,419 C2 Extra Care units increasing to 1,929 by 2041. This compares to a current supply of 401 bedspaces.
- A need in 2023 for 6,308 C3 specialist older person dwelling units rising to 8,575 by 2041. This compares with a current supply of 2,291 units.

3.23 This indicates a net need for 6,284 additional C3 dwelling units over the period 2023 to 2041 or 349 each year, a need for 1,528 C2 Extra Care units or 85 each year, and 575 C2 residential care bedspaces or 32 each year. There is a particular need for leasehold sheltered housing, enhanced sheltered, and Extra Care housing for sale and rent. Wigan has a good supply of dementia-friendly older persons accommodation through existing provision to help meet current and future needs.

3.24 Table 3. 8 below shows the comparative prices for the lower and median quartile from 2007 – 2023, along with the % change for the given time period. In summary, it shows that for the Borough of Wigan, the overall lower quartile price change was 24.6%, and the overall median price change was 31.7%.

Table 3.8 – Comparative lower quartile and median house price change 2007 – 2023 by sub-areas.

Sub-area	LQ price 2007	LQ price 2023	% change	Median price 2007	Median price 2023	% change
Ashton-in-Makerfield & Bryn	£105,000	£125,500	19.5%	£124,950	£175,500	40.5%
Atherton	£92,000	£115,000	25.0%	£116,950	£151,250	29.3%
Golborne & Lowton	£109,000	£130,000	19.3%	£130,000	£186,000	43.1%
Hindley & Abram	£89,950	£100,000	11.2%	£116,000	£133,000	14.7%
Leigh	£75,500	£101,700	34.7%	£91,000	£132,000	45.1%
Orrell & Winstanley	£124,950	£158,000	26.5%	£150,000	£195,000	30.0%
Shevington & Standish	£128,000	£160,000	25.0%	£155,975	£211,500	35.6%
Tyldesley & Astley	£100,000	£154,081	54.1%	£123,000	£220,000	78.9%
Wigan North & Aspull	£90,000	£115,000	27.8%	£113,000	£150,000	32.7%
Wigan South	£89,995	£101,000	12.2%	£110,000	£136,000	23.6%
Borough of Wigan	£92,313	£115,000	24.6%	£119,995	£158,000	31.7%

Source: Wigan LHNA, 2024

- 3.25 Table 3.9 provides an overview of the cost of renting privately across the Borough and compares prices with Greater Manchester, the North West region, and England as a whole. Over this time, lower quartile rents have increased by 52.9% and median rents have increased by 58.9%. These increases are below those experienced across Greater Manchester and other comparator areas.

Table 3.9 – Comparative lower quartile and median rental price 2010 – 2023

Location	LQ price (£) 2010	LQ price (£) 2023	% change 2010-2023
Wigan	£425	£650	52.9%
Greater Manchester	£490	£849	73.3%
North West	£472	£693	46.8%
ENGLAND	£598	£923	54.3%
Location	Median price (£) 2010	Median price (£) 2023	% change 2010-2023
Wigan	£472	£750	58.9%
Greater Manchester	£576	£1,101	91.1%
North West	£546	£901	65.0%
ENGLAND	£893	£1,473	64.9%

Source: Wigan LHNA 2024, Zoopla 2023

- 3.26 Table 3.10 summarises 2023 price data by sub-areas.

Table 3.10 – Lower quartile and median rents by sub-area 2023

Sub-area	Lower quartile (£ each month)	Median (£ each month)
Ashton-in-Makerfield & Bryn	£650	£724
Atherton	£685	£793
Golborne & Lowton	£676	£823
Hindley & Abram	£646	£693
Leigh	£650	£750
Orrell & Winstanley	£724	£847
Shevington & Standish	£709	£793
Tyldesley & Astley	£724	£897
Wigan North & Aspull	£550	£693
Wigan South	£648	£702
Borough of Wigan	£650	£750

Source: Wigan LHNA 2024, Zoopla 2023

Wigan Council – Strategic Housing Land Availability Assessment Update, April 2024.

- 3.27 The Strategic Housing Land Availability Assessment (SHLAA) is a key component of the council's evidence base to support the delivery of sufficient land for new housing to meet the borough's need for more homes and to inform housing policies within the Wigan Borough Local Plan. The SHLAA is updated annually.
- 3.28 This assessment is required by national planning policy, specifically paragraph 69 of the National Planning Policy Framework, which requires the council to prepare a SHLAA to identify a sufficient supply and mix of sites, taking into account their availability, suitability and likely economic viability.
- 3.29 The primary role of the SHLAA is to cover the following:
- Identify sites and broad locations with potential for development;
 - Assess their development potential; and
 - Assess their suitability for development and the likelihood of development coming forward (the availability and achievability).
- 3.30 This enables the council to assess whether there is an adequate supply of land to meet the borough's housing needs. Updating the assessment annually also enables the council to update its housing trajectory
- 3.31 As suggested by national guidance, a threshold of 5 homes has been applied to the assessment. All sites without planning permission with an estimated capacity of less than 5 homes have not been included.
- 3.32 Unless there is specific site intelligence suggesting otherwise, the gross to net ratios set out in Table 3.1 have been applied to sites without planning permission, to take into account land needed for supporting infrastructure, internal road layouts, open space etc. This has been applied to the developable areas of sites once site constraints have been considered.

Table 3.1 – Gross to net ratios for sites without planning permission

Gross site area	Gross to net ratio
0-2 hectares	100%
2-10 hectares	75%
Over 10 hectares	50%

Source: Wigan SHLAA, 2024

- 3.33 The total supply of sites over the next 15 years to 2039 is summarised in Table 3.2. Timeframes are for dwelling completions. The sites have also been sorted by planning status. This table does not represent a target for the number of homes to be built, nor is it an estimate of the number of homes that will be built. It provides an indication of the total capacity for homes in the borough that are suitable for development at this moment in time. Further sites will be added in future updates, which are undertaken annually.

Table 3.2 – Housing Land Supply to 2039 (at 1st April 2024)

	2024/29	2029/34	2034/39	Total 2024/39
SHLAA sites with full planning permission	4,204	728	232	5,164
SHLAA sites with outline planning permission	215	1,581	950	2,746
SHLAA sites with permission pending	665	1,307	981	2,953
SHLAA sites that are unpermissioned	0	2,433	2,043	4,476
Small sites with planning permission	253	0	0	253
Small sites windfall allowance	0	270	270	540
Total	5,337	6,319	4,476	16,132

Source: Wigan SHLAA, 2024

4 Residential Market Review

New Build Achieved Values

- 4.1 We have carried out a market review of new build achieved values within Wigan, across houses and flats. This has been based on a detailed analysis of the Land Registry new build achieved values for the period September 2023 - September 2025, cross-referenced, on an address-by-address basis (approx. 526 no. transactions) to the floor areas published on the EPC (Energy Performance Certificate) database to derive the achieved values (£ per square metre). This gives a good baseline for comparing the values across the different market areas. This is also consistent with the build cost rates £ psm from the BCIS.
- 4.2 We have removed the extremely high value and ‘one-off’ properties from the dataset, as well as ‘affordable units’ – to focus on the ‘typical’ new units and to avoid skewing the results⁵.
- 4.3 It should be noted that there is typically a time lag between the completion of new build property sales and the subsequent publication of these transactions by the Land Registry. As a result, the most recent period (particularly from mid-2025 onwards) may not yet be fully represented within the dataset.
- 4.4 This inherent delay means that the number of available transactions for the most recent months is limited, and therefore the analysis may not yet capture the full range of current market activity or any emerging trends in achieved values. This also means that there are a number of wards showing no new build achieved data during this period.
- 4.5 In addition, our analysis is based solely on Land Registry Category A data (standard residential transactions) and excludes Category B data, which contains additional price paid information. This further reduces the number of transactions available within the dataset but ensures consistency and reliability in the verified sale data used for comparison.
- 4.6 The Land Registry data for new build achieved values contains a ‘PPD Category Type’ which is defined on the gov.uk website as:

⁵ The data covers all new build transactions on all sizes of development; we have just removed the out-lying data.

“Indicates the type of Price Paid transaction”

A = Standard Price Paid entry, includes single residential property sold for full market value.

B = Additional Price Paid entry including transfers under a power of sale/repossessions, buy-to-lets (where they can be identified by a Mortgage) and transfers to non-private individuals.

Note that category B does not separately identify the transaction types stated. HM Land Registry has been collecting information on Category A transactions from January 1995. Category B transactions were identified from October 2013.”⁶

- 4.7 For the purposes of this research, we have excluded new build achieved data that falls under category B as the transactions consistently presented discounted transfer values to those provided under category A, therefore not reflecting the true full market value.

Achieved Values – Wigan

- 4.8 Within our review period, 526 no. new build houses were sold and recorded on the Land Registry across Wigan, in the last 2 years.
- 4.9 For new-build flats, there were 26 no. transactions were sold and recorded in the past 2 years. We have analysed these transactions separately by reviewing the house and flat transactions individually.

Houses

- 4.10 Table 4.1 provides a summary of new build house prices in Wigan with the range of achieved absolute values, i.e. Minimum, Average, Median, and Maximum.

Table 4.1 – New Build Achieved Absolute Values – Houses

	Value
Minimum £	£137,995
Average £	£284,850

⁶ Price Paid Data Guidance, 14th August 2014 (<https://www.gov.uk/guidance/about-the-price-paid-data>)

Median £	£269,995
Maximum £	£569,995

Source: 250926 New Build Houses Achieved Data v0.10

- 4.11 The new-build house prices in Wigan range from £137,995 - £569,995 with the average house price being £284,850, as shown above in Table 4.1
- 4.12 Table 4.2 summarises the price per square metre achieved for new build houses in Wigan, showing the Minimum, Average, Median and Maximum values.

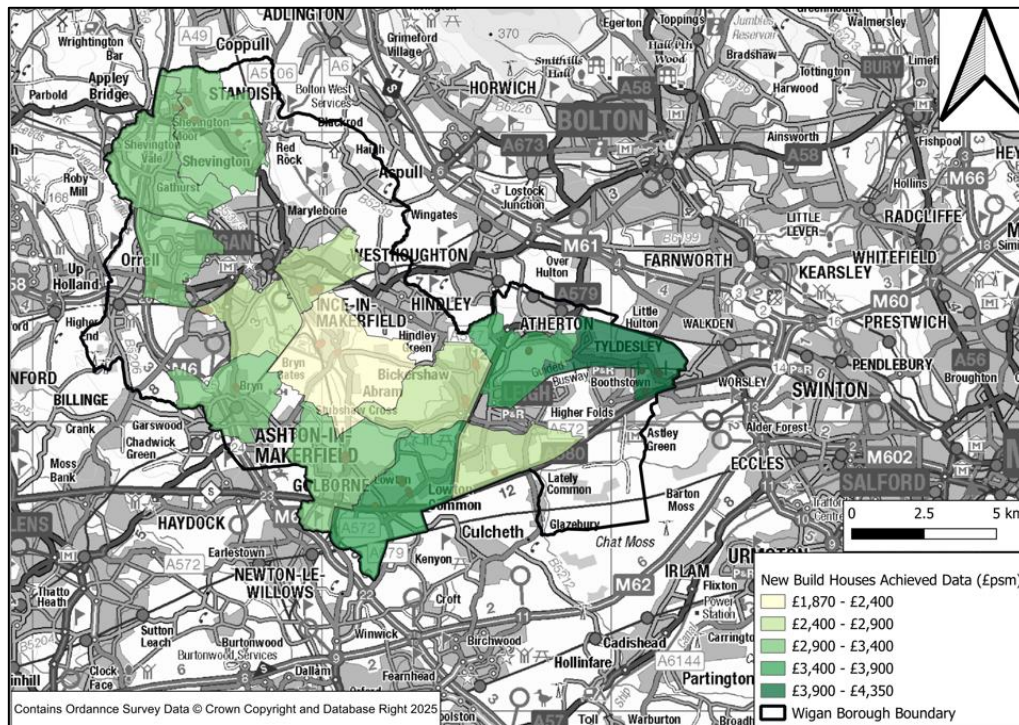
Table 4.2 – New Build Achieved £ psm Values – Houses

	Value
Minimum £ psm	£1,870
Average £ psm	£2,982
Median £ psm	£2,982
Maximum £ psm	£4,324

Source: 250926 New Build Houses Achieved Data v0.10

- 4.13 Within Wigan, the values range from £1,870 - £4,324 psm with the average being £2,982 psm, as shown in Table 4.2.
- 4.14 Figure 4.1 illustrates the average achieved values for new build houses across Wigan on a £ psm basis, broken down into wards.

Figure 4.1 – New Build Houses Achieved Data (£ psm)



Source: QGIS September, 2025

4.15 The map in Figure 4.1 shows the range of achieved values for new build houses across the Borough. From this we can see the following wards had no data recorded on the Land Registry in the last 2 years;

- Ashton-in-Makerfield South
- Aspull, New Springs and Whelley
- Astley
- Atherton North
- Douglas
- Hindley Green
- Hindley
- Leigh Central and Higher Folds
- Orrell
- Wigan Central
- Wigan West
- Winstanley

4.16 Figure 4.1 above identifies the areas showing lower values in Wigan have values ranging between £1,870 - £2,400 psm. The lower value wards are listed below:

- Abram

4.17 Figure 4.1 above identifies the areas showing low-medium values in Wigan, and have values ranging between £2,400 - £2,900 psm.

- Worsley Mesnes
- Ince
- Leigh West
- Leigh South

4.18 Figure 4.1 above shows the medium value areas in Wigan have values ranging between £2,900 - £3,400 psm. The medium value wards are listed below:

- Golborne & Lowton West
- Bryn with Ashton-in Makerfield North
- Pemberton
- Shevington with Lower Ground
- Standish with Langtree

4.19 Figure 4.1 above shows the higher-medium value areas in Wigan have values ranging between £3,400 - £3,900 psm. The higher-medium value wards are listed below:

- Lowton East
- Atherton South & Lilford

4.20 Figure 4.1 above identifies areas showing higher values in Wigan have values ranging between £3,900 - £4,350 psm. The higher value ward is listed below:

- Tyldesley & Mosley Common

Flats

4.21 We have carried out a search of new build flats for the past 2 years on the Land Registry price paid data set (September 2023 – September 2025). Within this period, 26 no. flats were sold and recorded on the Land Registry.

- 4.22 Table 4.3 provides a summary of the range of values achieved across Wigan, on an absolute value basis, i.e. Minimum, Average, Median, and Maximum for new-build flats.

Table 4.3 – New Build Achieved Absolute Values – Flats

	Values
Minimum £	£121,995
Average £	£142,774
Median £	£131,472
Maximum £	£325,000

Source: 250924 New Build Flats Achieved Data (past 2 years) v0.1

- 4.23 Table 4.3 shows that values range between £121,995 - £325,000 with an average value of £142,774.

- 4.24 Our search identified:

- 6 no. transactions at Bryan House, Standishgate
- 7 no. transactions at Green Lawns Close, Lowton
- 1 no. transactions at Jasmine Court, Platt Bridge
- 12 no. transactions at Newtons Fold, Leigh

- 4.25 As there are limited new-build flatted transactions across the Borough, and not all wards are represented, the evidence is insufficient to reflect values for Wigan as a whole. Instead, these transactions are used as a benchmark, supported by second-hand sales, to inform the value assumptions applied across the different value zones.

- 4.26 Table 4.4 sets out a summary of transactions for new-build flats in Wigan, showing the range of values achieved on a price per square metre, including the Minimum, Average, Median and Maximum.

Table 4.4 – New Build Achieved £ psm Values - Flats

	Value
Minimum £ psm	£1,848
Average £ psm	£2,533

Median £ psm	£2,458
Maximum £ psm	£3,540

Source: 250924 New Build Flats Achieved Data (past 2 years) v0.1

- 4.27 The achieved values on a £psm basis ranged from £1,848 - £3,540 psm across Wigan the last 2 years. The average achieved value in Wigan is £2,533 psm.
- 4.28 Compared to houses, there were significantly fewer new-build transactions for flatted properties, with only 4 of the wards within Wigan having achieved transactional data for flats. These wards include;
- Standishgate (which falls in the ward of Wigan Central)
 - Platt Bridge (which falls in the ward of Abram)
 - Lowton (falls under the ward of Lowest East)
 - Leigh (falls under the ward of Leigh West)
- 4.29 Given the limited transactional evidence across much of the Borough, data is scarce for many wards within Wigan. To build a more robust dataset and enable a fuller spatial analysis of values, we have also reviewed new-build asking prices, as set out in Section 6 of the report. Recognising that asking prices are often set above achieved market values, we have accounted for this when forming our value assumptions.

Achieved Values – By number of beds

- 4.30 The Land Registry does not provide details of the number of bedrooms. Therefore, we have made the following assumptions having regard to the Nationally Described Space Standards set out by the Ministry of Housing, Communities and Local Government (MHCLG).⁷

⁷ Ministry of Housing, Communities and Local Government, Nationally Described Space Standards - [Technical housing standards – nationally described space standard](#) - GOV.UK

Figure 4.2 – Nationally Described Space Standards

Number of bedrooms(b)	Number of bed spaces (persons)	1 storey dwellings	2 storey dwellings	3 storey dwellings	Built-in storage
1b	1p	39 (37) ²			1.0
	2p	50	58		1.5
2b	3p	61	70		2.0
	4p	70	79		
3b	4p	74	84	90	2.5
	5p	86	93	99	
	6p	95	102	108	
4b	5p	90	97	103	3.0
	6p	99	106	112	
	7p	108	115	121	
	8p	117	124	130	
5b	6p	103	110	116	3.5
	7p	112	119	125	
	8p	121	128	134	
6b	7p	116	123	129	4.0
	8p	125	132	138	

Source: Ministry of Housing, Communities and Local Government, Nationally Described Space Standards, 2025

- 4.31 For all houses (detached, semi-detached and terrace) and apartments we have assumed they are as follows:

Table 4.5 – Floor area for property type

Property Type	Floor Area (Sqm)
1 Bed Apartment	50
2 Bed Apartment	62
2 Bed House	70
3 Bed House	102
4+ Bed House	130

Source: Ministry of Housing, Communities and Local Government, Nationally Described Space Standards, 2025

Houses

- 4.32 Our research identified 500 no. transactions for new-build houses. Table 4.6 summarises the average values achieved across Wigan, broken down by 1-bed, 2-bed, 3-bed and 4+ bed houses.

Table 4.6 – Average achieved values for new build houses in Wigan

House Type	Average Price
2-Bed House	£253,927
3-Bed House	£324,413
4+ Bed House	£432,364

Source: 250926 New Build Houses Achieved Data v0.10

- 4.33 Table 4.6 shows the average achieved price for 2-bedroom houses was £253,927. The average achieved price for 3-bedroom houses is £324,413. The average achieved price for 4+ bedroom houses is £432,364.

Table 4.7 – Range of floor areas by number of beds

House Type	Wigan (sqm)
2-Bed House	70-101
3-Bed House	102-129
4+Bed House	130-168

Source: 250926 New Build Houses Achieved Data v0.10

- 4.34 Table 4.7 sets out the range of floor areas by the number of beds within Wigan from the achieved data. These floor areas range between 70-101 sqm for a 2-bed house, 102 - 129 sqm for a 3-bed house, and 130 – 168 sqm for 4+ bed houses.
- 4.35 To analyse the range of floor areas below, we have cross checked the floor area ranges displayed in the NDSS table, see Figure 4.2, with the achieved data we have found. This gives the most accurate floor areas for properties by number of beds for the Wigan Borough.

Table 4.8 – Average achieved values £psm for New Build Houses in Wigan

House Type	Average Values £ psm
2-Bed House	£3,017
3-Bed House	£2,910
4+Bed House	£3,035

Source: 250926 New Build Houses Achieved Data v0.10

- 4.36 Table 4.8 summarises the average achieved house values on a £ per square metre (£psm) basis by house type across Wigan. The 2 bed houses have an average £psm of £3,017, 3 bed houses have an average £psm of £2,910, and 4+ bed houses have an average £psm of £3,035.

Flats

- 4.37 Our search identified 26 no. transactions for new-build flats. Table 4.9 summarises the average achieved values for new-build flats across Wigan.

Table 4.9 – Achieved values for New Build flats

House Type	Average Values
1-Bed Flat	£136,916
2-Bed Flat	£174,996

Source: 250918 New Build Flats Achieved Data (past 2 years) v0.1

- 4.38 Table 4.9 shows the new build 1-bed flats average is £136,916, and the average for 2-bed flats is £174,996. There were 22 no. transactions for 1-bed new build flats recorded on Land Registry and 4 no. transaction for 2-bed new-build flats. As this data for 1 and 2 bed flats only covers 4 wards, it is not representative of values for new build achieved flats in Wigan.
- 4.39 The limited data identified for flats during the evaluation period will be substantiated by second hand transactions in the subsequent section of this report.

Table 4.10 – Floor areas by number of beds for flats

House Type	Wigan (sqm)
1-Bed Flat	40-60
2-Bed Flat	66-130

Source: 250924 New Build Flats Achieved Data (past 2 years) v0.1

- 4.40 Table 4.10 sets out the range of floor areas by the number of beds within Wigan. 1-bed flats have floor areas between 40-60 sqm and the 2-bed flats have floor areas of 66-130 sqm. We acknowledge that the 2 bed flats are considerably larger than NDSS 2 bed flats, and we have taken this into consideration when arriving at our value assumptions in section 7 of this report.

Table 4.11 – Average values £psm for flats

House Type	Average Values £ psm
1-Bed Flat	£2,622
2-Bed Flat	£2,045

Source: 250924 New Build Flats Achieved Data (past 2 years) v0.1

- 4.41 Table 4.11 shows the average values per square metre for flats within Wigan, with averages of £2,622 for 1-bed flats and £2,045 for 2-bed flats. However, due to lack of achieved data within the time frame, we will add a reasonable premium for the 2 bed apartments to ensure our assumptions remain reflective of the market.

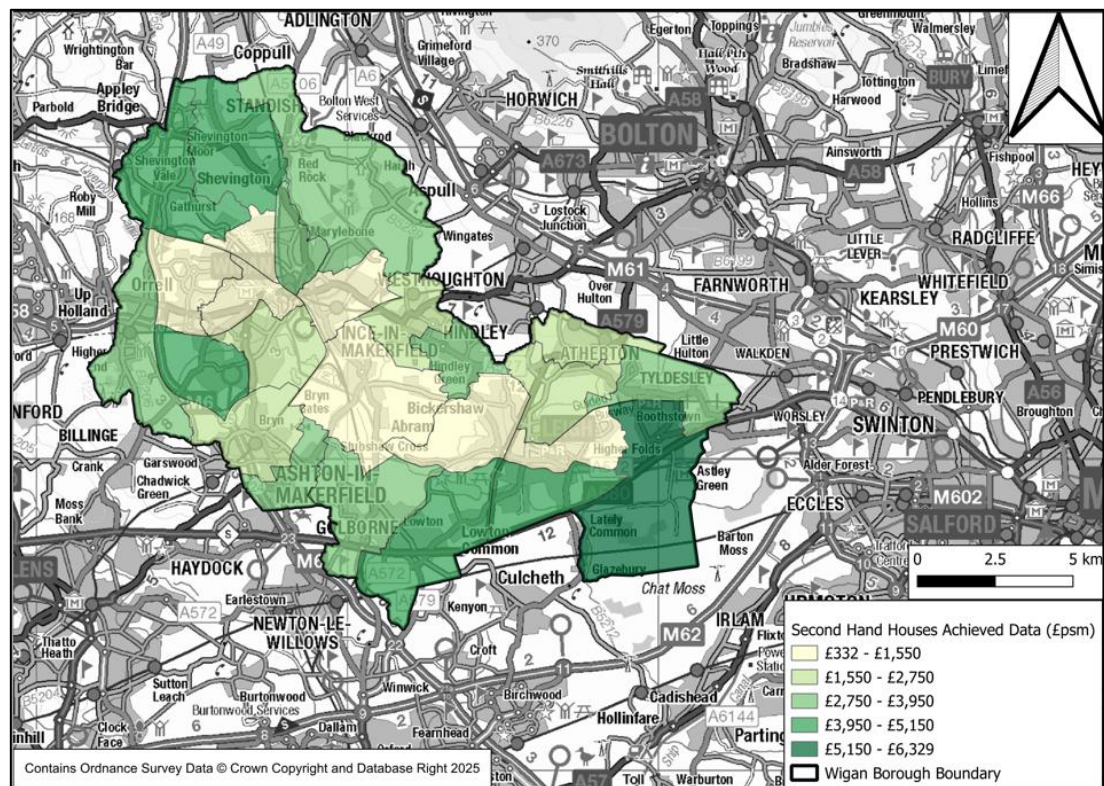
5 Housing Value Zones

- 5.1 In this section, we build upon our new-build market research to arrive at value zones across the Borough.
- 5.2 The purpose of this part of the report is to create a visual representation of the differences in value across Wigan and what can be reasonably expected to be achieved within these defined value zones.
- 5.3 We have therefore sought to rationalise and simplify the Housing Value Zones for ease of application both in terms of policy and values. All planning obligations (including Affordable Housing) should ‘align’ in terms of Housing Value Zones and viability.
- 5.4 Note that this section on Housing Value Zones is about the *relativity* of values across zones in Wigan – not the *absolute* value assumption which is contained in section 7 below.

Second-Hand Values

- 5.5 To sense check the pattern of new-build values across Wigan, we have reviewed the second-hand market over the last 24 months (September 2023- September 2025). There is a greater stock of second-hand properties and turnover is higher than for new builds.
- 5.6 As with new build transactions, this has been based on an address-by-address basis (2,680 transactions) and compared to the floor areas published on the EPC database to derive the achieved values (£ per square metre).
- 5.7 We have carried out this sense check to identify whether or not there is a pattern across Wigan which can help establish our Housing Value Zones and reinforce the pattern identified for new build values. The mapping below shows that we have data for all wards in the Borough.
- 5.8 Figure 5.1 and Figure 5.2 illustrate the average achieved values on a per sqm basis across the Borough for houses (Detached, Semi-Detached, and Terraced) and flats.

Figure 5.1 – Second Hand Houses Achieved Data (£ psm)



Source: QGIS September 2025

5.9 The lower-value wards are listed below with values ranging between £332 - £1,550 psm:

- Leigh Central & Higher Folds
- Leigh West
- Abram
- Ince
- Douglas
- Pemberton
- Wigan West

5.10 The low-medium wards are listed below with values ranging between £1,550 - £2,750 psm:

- Bryn with Ashton-in-Makerfield North
- Worsley Mesnes

- Hindley
- Atherton South & Lilford
- Atherton North

5.11 The medium value wards are listed below with values ranging between £2,750 - £3,950 psm:

- Tyldesley & Mosley Common
- Hindley Green
- Aspull, New Springs & Whelley
- Wigan Central
- Orrell
- Ashton-in-Makerfield South
- Golborne & Lowton West

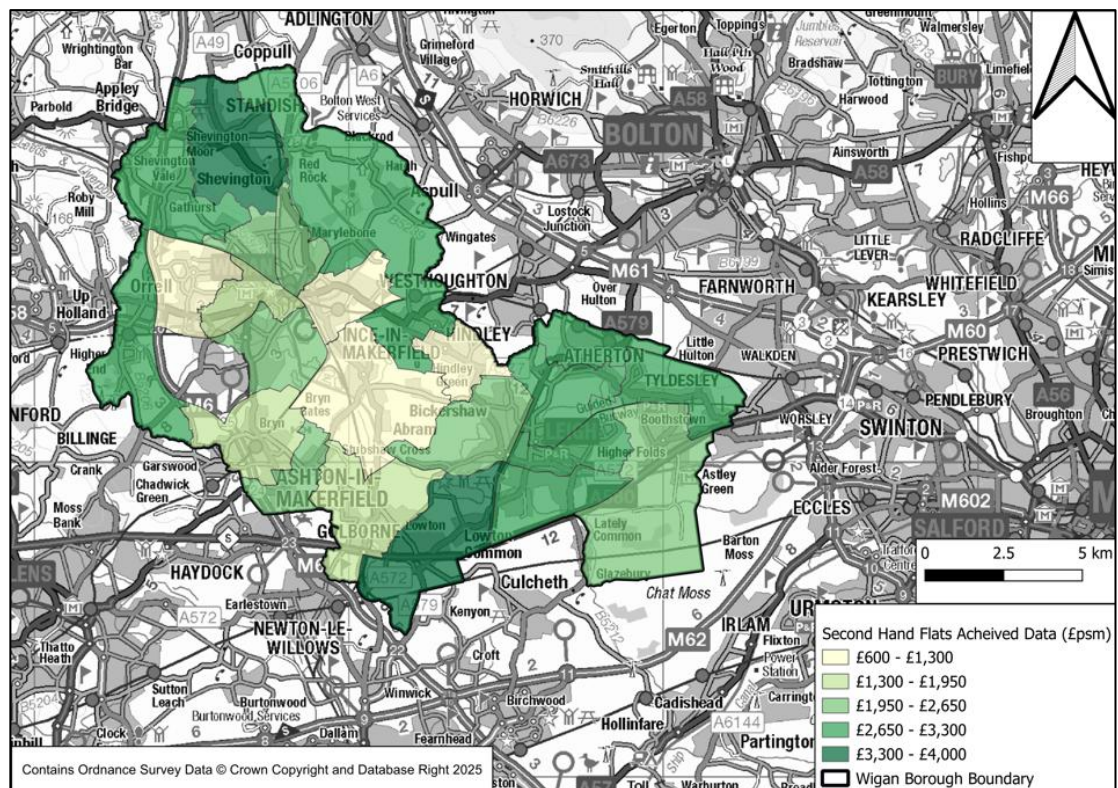
5.12 The higher-medium value zones are listed below with values ranging between £3,950 - £5,150

- Lowton East
- Leigh South
- Winstanley
- Shevington with Lower Ground & Moor
- Standish with Langtree

5.13 The higher-value ward is listed below with values ranging between £5,150 - £6,329 psm:

- Astley

Figure 5.2 – Second Hand Flats Achieved Data (£ psm)



Source: QGIS September 2025

5.14 The lower-value wards are listed below with values ranging between £600 - £1,300 psm:

- Pemberton
- Ince
- Abram
- Hindley Green

5.15 The lower to medium value wards are listed below with values ranging between £1,300 - £1,950 psm:

- Douglas
- Bryn with Ashton-in-Makerfield North
- Golborne & Lowton West

5.16 The medium-value wards are listed below with values ranging between £1,950 - £2,650 psm:

- Wigan West
- Wigan Central
- Worsley Mesnes
- Ashton-in-Makerfield South
- Leigh West
- Astley

5.17 The medium to higher value wards is listed below with values ranging between £2,650 - £3,300 psm:

- Shevington with Lower Ground & Moor
- Orrell
- Aspull, New Springs & Whelley
- Atherton North
- Atherton South & Lilford
- Tyldesley & Mosley Common
- Leigh Central & Higher Fold
- Leigh South

5.18 The higher-value wards are listed below with values ranging between £3,300 - £4,000 psm:

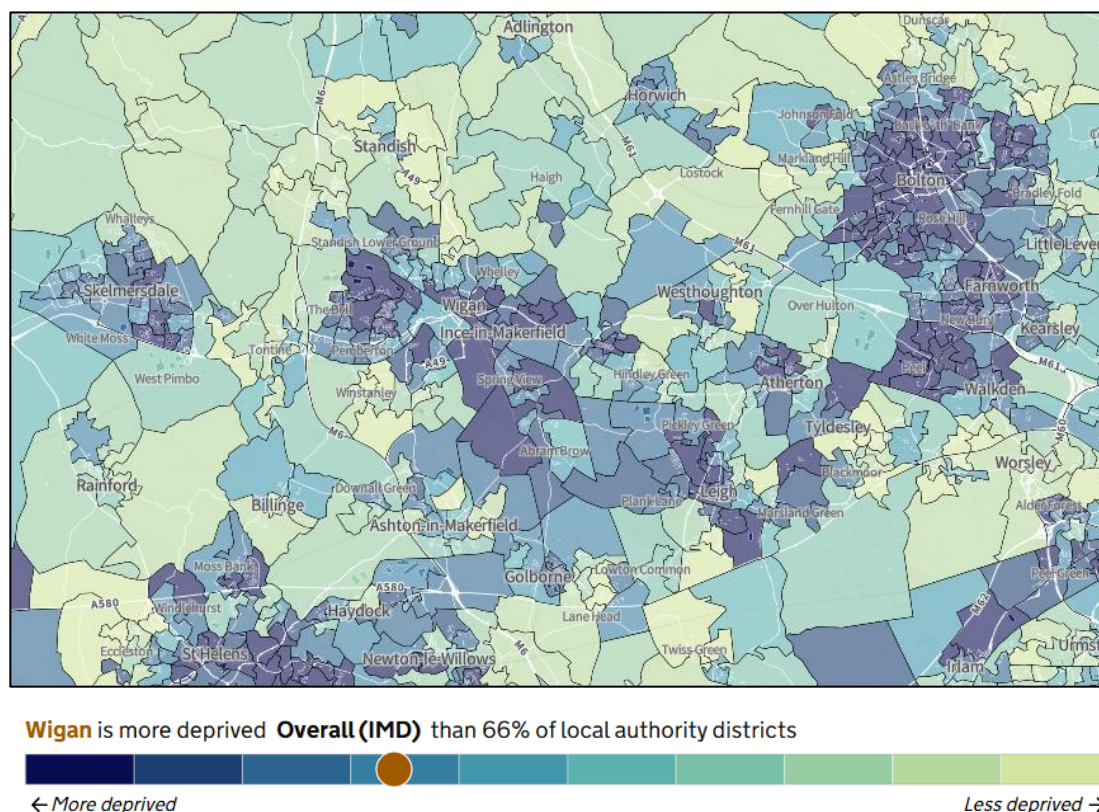
- Standish with Langtree
- Lowton East

Index of Multiple Deprivation

5.19 When preparing our Housing Value Zones, we also had regard to the Index of Multiple Deprivation (IMD). The IMD provides a metric for which multiple data points, such as average income, health, education, crime, unemployment etc., are all amalgamated into a single rating which shows the level of deprivation that an area is experiencing, this is illustrated on a map (See Figure 5.3).

5.20 Although this is not a direct comparison to housing values, it is a very good proxy. In our experience, higher values tend to be found in areas of least deprivation and values are lower in areas where there is greatest deprivation. This IMD map is therefore a good proxy for the Housing Zones Map.

Figure 5.3 – Index of Multiple Deprivation Map



Source: Index of Multiple Deprivation (2025)

AspinallVerdi Housing Market Zones

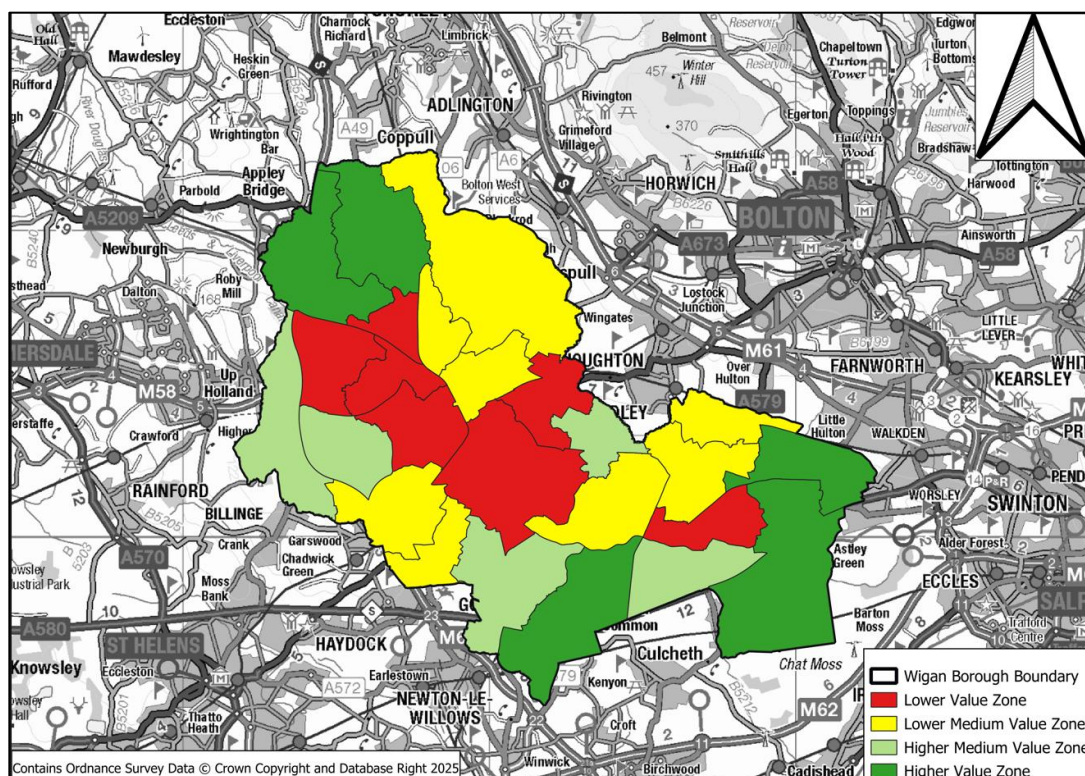
5.21 To derive our Housing Market Zones, we have had regard to:

- the existing evidence base and particularly the heat maps and choropleth maps contained in previous market research.
- current new-build achieved values,
- second-hand achieved values, and
- the Index of Multiple Deprivation.
- Achieved recent levels of affordable housing

5.22 Figure 5.4 shows the result of our analysis of the data listed above. We set out four value zones in this map. These are the 'lower', 'lower-medium', 'higher-medium' and 'higher' value zones – which are mapped on a ward basis across Wigan. This will form the basis of our Typologies Matrix with which we will model different site typologies

(e.g., greenfield, brownfield and green belt) together with current policy requirements (i.e., S106) with a view to future alignment.

Figure 5.4 – AspinallVerdi Wigan Housing Market Zones



Source: QGIS, December 2025

- 5.23 The aim is to produce a map that is evidence based and transparent; and logical for ease of implementation. It will never be perfect.
- 5.24 These maps provide a high-level overview and do not capture variations in value within individual wards. We acknowledge that certain wards contain a mix of higher and lower value areas, which can influence the overall averages and potentially distort the data. There may be a particularly high value scheme in a lower value area and vice-versa depending on particular local and site circumstances. For example, Swinley is generally considered a higher value area, but as it falls within the Wigan Central ward, it is represented within a lower overall value classification.
- 5.25 For our value zone maps, we have signified the low, low-medium, higher-medium and higher value zones by colour coding each one.
- 5.26 The lower value zones are signified in red, and they are listed below;

- Leigh Central & Higher Folds
- Hindley
- Abram
- Pemberton
- Wigan West
- Douglas
- Worsley Mesnes

5.27 The low-medium wards are signified in yellow and they are listed below:

- Aspull, New Springs & Whelley
- Wigan Central
- Ince
- Ashton-in-Makerfield South
- Leigh West
- Atherton South & Lilford
- Atherton North
- Bryn with Ashton-in-Makerfield North

5.28 The higher-medium wards are signified in orange and they are listed below:

- Winstanley
- Golborne & Lowton West
- Hindley Green
- Leigh South
- Orrell

5.29 The wards within the higher value zone are signified in green and they are listed below;

- Astley
- Tyldesley & Mossley Common
- Lowton East
- Standish with Langtree
- Shevington with Lower Ground & Moor

6 New Build Asking Prices

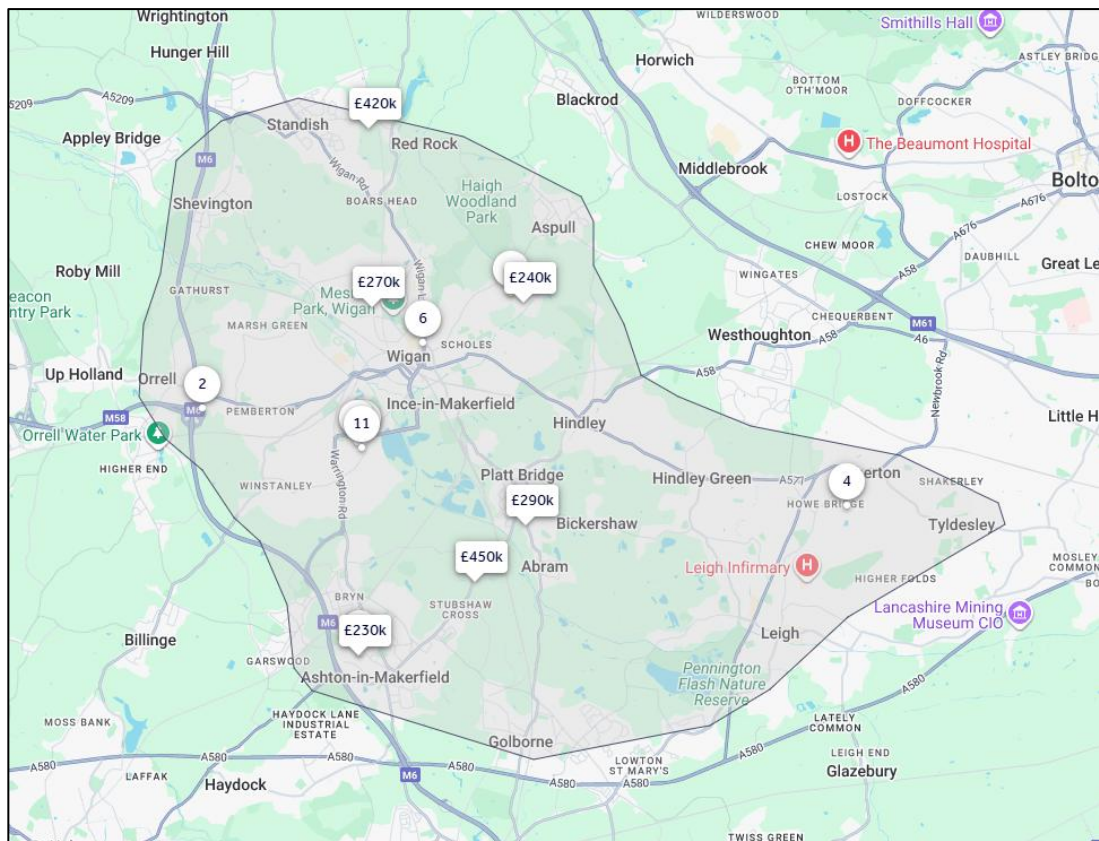
- 6.1 Having established our housing market value zones, we have then sought to establish representative value assumptions for each house type in the various zones.
- 6.2 We have had regard to the achieved prices set out in Sections 4 and 5 above. We have also reviewed several new build developments currently 'on-site' within Wigan to understand the up-to-date *asking values* associated with new build properties which can be used to inform the values in our viability testing.
- 6.3 It should be noted that asking prices may be aspirational and may reflect the incentives offered by the developer (which have to be deducted to calculate a net price) or the actual value a willing purchaser will pay.
- 6.4 The RICS information paper on comparable evidence in property valuation⁸ states that asking prices:
- 'Cannot by themselves provide reliable evidence of value and should be treated with some caution. They will usually vary from the price achieved on exchange in the open market, but when interpreted with care by an experienced valuer they can provide some guidance as to current market sentiment and trends in value.'*
- 6.5 Thus, whilst the achieved value data (from the Land Registry in Section 4 above) provides robust data, this is retrospective. The asking price analysis in this section indicates more up-to-date prices for new build homes. It is important to note that in arriving at our value assumptions for use in the appraisals, whilst, we will have had regard to the new build asking prices our figures reflect on the transactional data (Section 4).
- 6.6 Finally, it is important to note that the supply ('flow') of new build properties has to be sold within a marketplace that includes an established 'stock' of competing second-hand properties (Section 5 above). The asking price is therefore tempered by the wider price mechanism and housing choices for purchasers.

⁸ Comparable evidence in property valuation, RICS information paper, 1st edition (IP 26/2012)

New Build Asking Prices

- 6.7 We have identified 10 no. new build developments within Wigan. Figure 6.1 below shows where the new build developments are located.
- 6.8 We have drawn our own map to cover all of the wards within Wigan and keep our search as accurate as possible to get the most reliable values for the area.
- 6.9 Although the map shows more new build developments, we have only included developments with several properties on, as some shown on the map were single dwelling properties, therefore not comparable to developments of multiple properties.

Figure 6.1 - New Build Developments in Wigan



Source: Rightmove, September 2025

Lower Value Zone

6.10 The following developments listed below fall within our lower value zone.

The Seasons, Worsley Mesnes

6.11 This development covers listed properties within the address of Worsley Mesnes Drive, Worsley Mesnes, Wigan, Greater Manchester.

6.12 This development comprises a total of 169 no. properties, and was developed by Keepmoat Homes. There is a mixture of detached, semi-detached and terraced housing, comprising of 2, 3 and 4 bedrooms.

6.13 There are currently 24 no. properties listed on the market. The listed properties range between £185,000 - £275,000 with an average price of £245,521. The floor areas for the properties listed range between 63 - 95 sqm, and the £ psm values range between £2,657 - £3,095 psm, with an average of £2,899 psm. See table 6.1 below.

Table 6.1 – The seasons asking prices

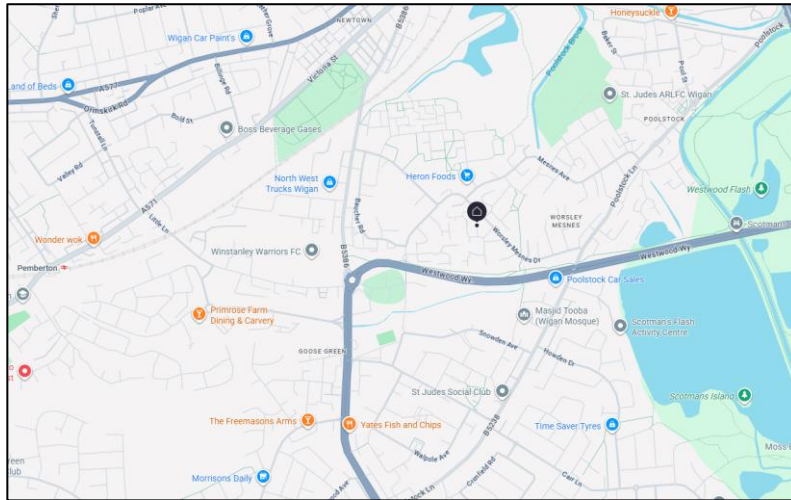
Property Type	Bedrooms	Price	Floor area (sqm)	£psm
Detached	3	£275,000	89	£3,090
Semi detached	3	£270,000	89	£3,034
Semi-detached	3	£260,000	89	£2,921
Semi-detached	3	£260,000	89	£2,921
Semi-detached	3	£260,000	95	£2,737
Semi-detached	3	£255,000	89	£2,865
Semi-detached	3	£250,000	89	£2,809
Semi-detached	3	£247,500	89	£2,781
Semi-detached	3	£245,000	89	£2,753
Semi-detached	3	£235,000	76	£3,092
Semi-detached	3	£235,000	76	£3,092
Semi-detached	3	£230,000	77	£2,987
Semi-detached	2	£195,000	63	£3,095
Terraced	3	£255,000	95	£2,684
Terraced	3	£262,500	95	£2,763
Terraced	3	£252,500	95	£2,658
Terraced	3	£235,000	78	£3,013
Terraced	3	£220,000	77	£2,857
Terraced	2	£185,000	63	£2,937

Source: Rightmove, September 2025

6.14 The seasons is located 40 minutes from both Liverpool and Manchester. The closest train stations are Pemberton and Wigan North Western which are both 1.5 miles away. There are a handful of amenities locally to the development, such as

supermarkets, bars/restaurants, schools, gyms and more, all within a 3 - mile radius.
See below figure 6.2 for location map.

Figure 6.2 – The Seasons location map



Source: Rightmove, September 2025

6.15 A photo of the property is shown in Figure 6.3 below.

Figure 6.3 – The seasons property photo



Source: Rightmove, September 2025

Knowles Nook, Ashton-in-Makerfield

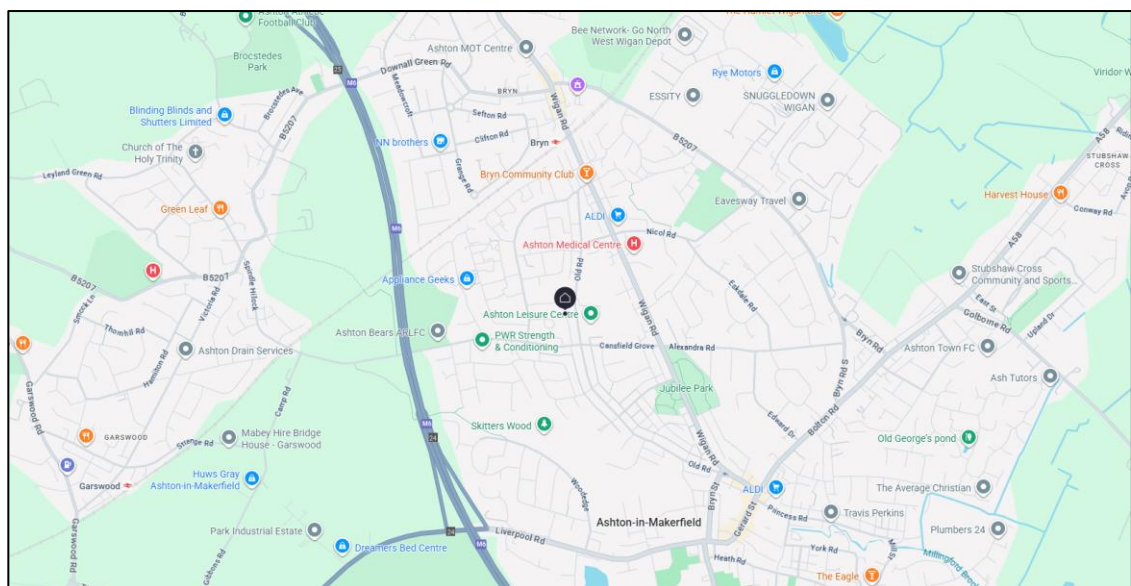
- 6.16 There are 3 no. properties currently listed at Knowles Nook, Ashton-in-Makerfield, and have been developed by a private small developer. The listed properties are semi-detached, 3-bed properties, all listed for £230,000 with a floor area of 83 sqm, equating to £2,771 psm. See table 6.2 below.
- 6.17 The closest train stations to this development are Bryn (0.8 miles away) and Garswood (1.3 miles away). It is in close proximity to the M6 (Junction 24) and it is also near Jubilee Park.

Table 6.2 – Asking prices for Knowles Nook

Property Type	Bedrooms	Price	Floor area (sqm)	£psm
Semi-Detached	3	£230,000	83	£2,771
Semi-Detached	3	£230,000	83	£2,771
Semi-Detached	3	£230,000	83	£2,771

Source: Rightmove, November 2025

Figure 6.4 – Location map for Knowles Nook



Source: Rightmove, November 2025

Figure 6.5 – Knowles Nook property photo



Source: Rightmove, November 2025

Low-Medium Value Zone

6.18 The following developments listed below fall within our low-medium value zone.

Beefold development, Bee Fold Lane, Atherton

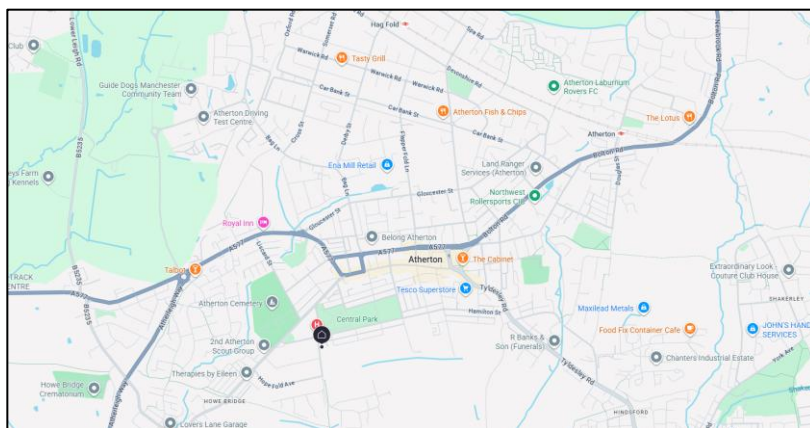
- 6.19 This development comprises a total of 120 properties, and was developed by Bloor Group. There is a mixture of 3- and 4-bedroom homes, with 6 no. properties currently listed on the market.
- 6.20 The listed properties range between £334,995 - £409,995 with an average price of £389,162. The floor areas range between 87 – 118 sqm and the £psm values range between £3,389 - £3,850 psm with an average of £3,557 psm. See table 6.4 below.
- 6.21 The nearest train stations to this development are Hagfold (0.9 miles away), Atherton (1.1 miles away) and Daisy Hill (1.5 miles away). The M61 motorway is just 3.5 miles away and Wigan Town Centre is 4 miles away. Manchester City Centre is 10 miles away and there is access to Liverpool John Lennon Airport within 5.5 miles.

Table 6.4 – Asking prices at Beefold Lane

Property Type	Bedrooms	Price	Floor area (sqm)	£psm
Bee Fold Lane, Atherton, M46 0BL				
Detached	3	£334,995	87	£3,850
Detached	4	£374,995	103	£3,640
Detached	4	£399,995	118	£3,389
Detached	4	£404,995	118	£3,432
Detached	4	£409,995	118	£3,474

Source: Rightmove, September 2025

Figure 6.9 – Location map for Beefold Lane



Source: Rightmove, September 2025

Figure 6.10 – Beefold Lane property photo



Source: Rightmove, September 2025

Kirkless Street, Aspull

- 6.22 There are 4 no. properties currently listed at Kirkless Street, Aspull, and have been developed by a private small developer.
- 6.23 The listed properties are semi-detached, 3 no. 3-bed properties and 1 no. 4-bed property. The values for these properties range between £300,000 - £395,000 with an average price of £342,500. The £psm values for the properties listed range between £2,296 - £2,850 psm with an average of £2,681 psm, and the floor areas range between 108 – 172 sqm. See Table 6.5 below.

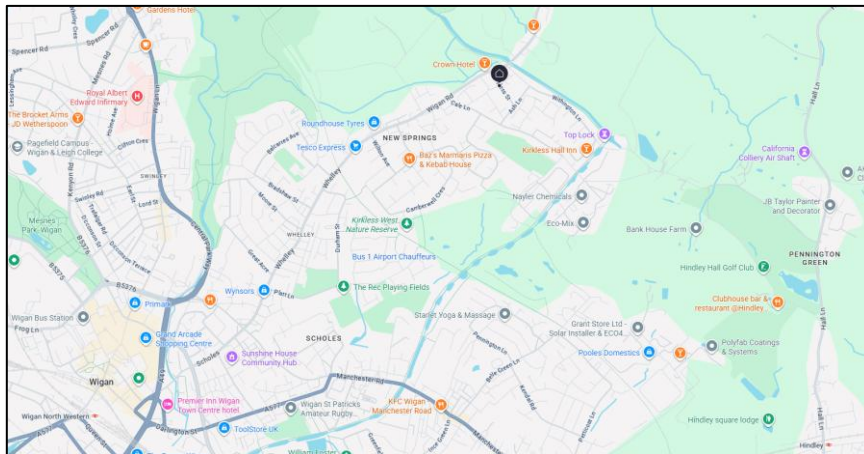
Table 6.5 – Kirkless Street asking prices

Property Type	Bedrooms	Price	Floor area (sqm)	£psm
Semi-Detached	3	£300,000	108	£2,777
Semi-Detached	3	£325,000	114	£2,850
Semi-Detached	3	£350,000	125	£2,800
Semi-Detached	4	£395,000	172	£2,296

Source: Rightmove, September 2025

- 6.24 The closest train stations to this development are Wigan North Western (2 miles away) and Hindley train station (3.2 miles away). There are many bars/restaurants and retail stores nearby with Wigan Town Centre being 2 miles away from this development.
- 6.25 See Figure 6.11 for Location Map.

Figure 6.11 – Kirkless Street Location Map



Source: Rightmove, September 2025

6.26 A photo of the property is shown in Figure 6.12 below.

Figure 6.12 – Kirkless Street property photo



Source: Rightmove, September 2025

Higher-Medium Value Zone

6.27 The following developments listed below fall within our higher-medium value zone.

Moss Bank Gardens, Oakhead, Leigh

- 6.28 There is a total of 146 no. homes on the Moss Bank Gardens development, consisting of 2, 3 and 4- bedroom homes, which have been developed by Bellway Homes. There are 7 no. properties currently listed at Moss Bank Gardens, Leigh. The listed properties are detached, semi-detached and terraced, consisting of 3 and 4 bed properties. The asking prices for the properties range between £264,995 - £391,995. Floor areas also range between 80 – 108 sqm equating to a range of values between £3,312 - £3,630 psm for the listed properties. See table 6.6 below.
- 6.29 The closest train station to this development is Atherton train station (5 miles away). Within Leigh there are a choice of amenities in close proximity to the development, including restaurants/takeaways, supermarkets and fitness centres.

Table 6.6 – Asking prices at Moss Bank Gardens

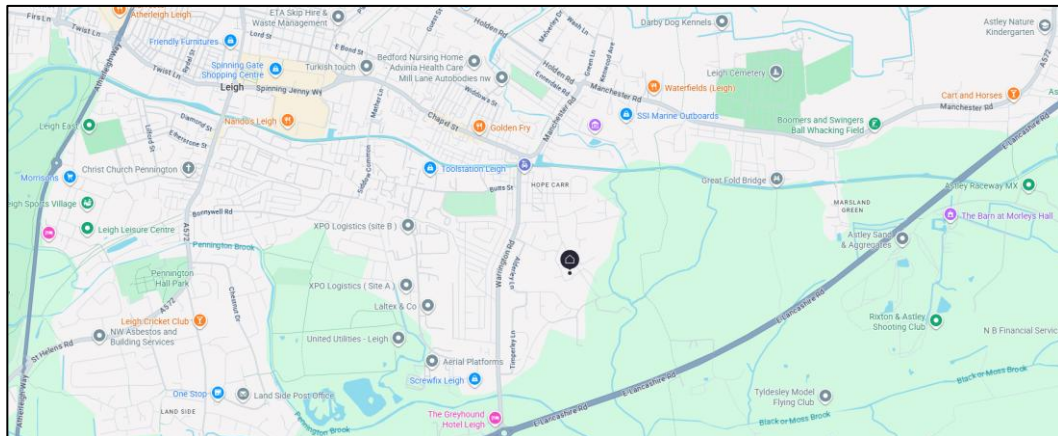
Property Type	Bedrooms	Price	Floor area (sqm)	£psm
Detached	4	£391,995	108	£3,630
Detached	3	£356,995	101	£3,535
Semi detached	3	£274,995	80	£3,437
Semi detached	3	£274,995	80	£3,437
Semi detached	3	£274,995	80	£3,437
Terraced	3	£264,995	80	£3,312
End of terrace	3	£269,995	80	£3,375

Source: Rightmove, November 2025

- 6.30 See figure 6.13 for location map of this development and figure 6.14 for property photos.

6.31

Figure 6.13 – Location map for Moss Bank Gardens



Source: Rightmove, November 2025

Figure 6.14 – Property photo for Moss Bank Gardens



Source: Rightmove, November 2025

Lathom Grange, Orrell

6.32 Lathom Grange has 61 no. properties in total, and was developed by Morris Homes. This development comprises of 2, 3 and 4-bedroom homes with currently just 2 no. properties listed on the market. The first property is a 4-bedroom detached house listed for £426,750 with a floor area of 136 sqm equating to £3,129 psm. The second

property s a 2-bedroom terraced house listed for £221,750 with a floor area of 70 sqm equating to £3,167 psm. See table 6.3 below.

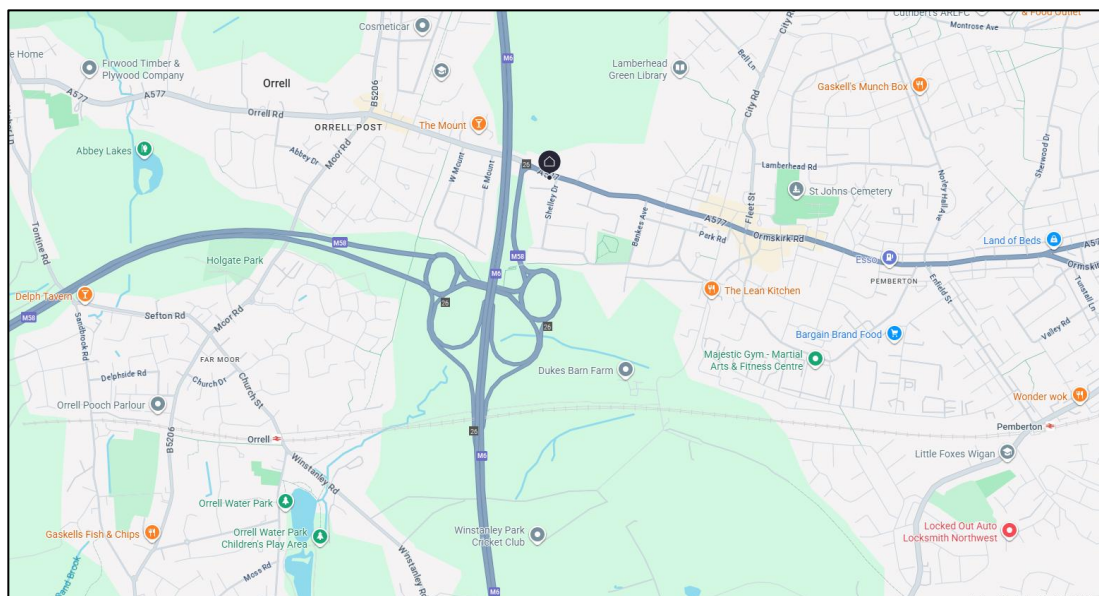
Table 6.3 – Asking prices at Lathom Grange

Property Type	Bedrooms	Price	Floor area	£psm
Detached	4	£426,750	136	£3,128
Terraced	2	£221,750	70	£3,167

Source: Rightmove, September 2025

- 6.33 Lathom Grange is a 15 - minute drive from Wigan Town Centre where there are retail stores and bars/restaurants. Additionally, the development sits right next to the M58 and M6, giving connections to Liverpool and Manchester. The closest train station is Orrell station which is 1 mile away. See figure 6.6 for location map.

Figure 6.6 – Lathom Grange location map



Source: Rightmove, September 2025

- 6.34 Photos of the properties are shown in Figure 6.7 and 6.8 below.

Figure 6.7 – Lathom Grange detached house



Source: Rightmove, September 2025

Figure 6.8 – Lathom Grange terraced house



Source: Rightmove, September 2025

Figure 6.16 – Property photos at Rectory Woods



Source: Rightmove, November 2025

Figure 6.17 – Property photos at Rectory Woods



Source: Rightmove, November 2025

Lambert Meadows, Tyldesley

- 6.39 There are 3 no. properties currently listed at Lambert Meadows, Tyldesley, and have been developed by Elan Homes. The listed properties are detached, consisting of 4 and 5-bed properties. The asking price for all three properties range between £589,995 - £639,995. We have been unable to receive floor area information from the agent. See Table 6.8 below.
- 6.40 The closest train station to this development is Walkden train station (3.2 miles away) or Atherton (3.4 miles away). Within Tyldesley there are a choice of amenities in close proximity to the development, including restaurants/takeaways, and a range of supermarkets.

Table 6.8 – Asking prices for Lambert Meadows

Property Type	Bedrooms	Price
Detached	5	£639,995
Detached	4	£599,995
Detached	4	£589,995

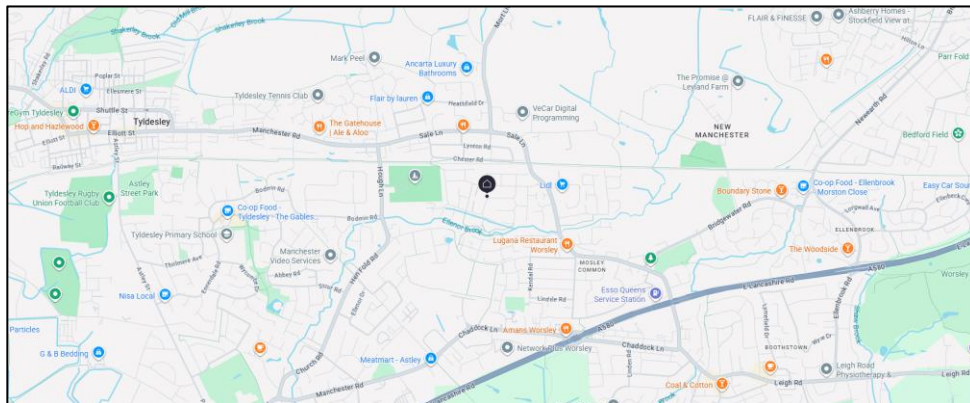
Source: Rightmove, November 2025

Figure 6.18 – Property photo for Lambert Meadows:



Source: Rightmove, November 2025

Figure 6.19 - Location map for Lambert Meadows



Source: Rightmove, November 2025

Windmill Brow, Hadbutt Lane, Astley

- 6.41 There are 2 no. properties currently listed at Windmill Brow, Hadbutt Lane, Astley, and they have been developed by Redwater Developments. The listed properties are detached, consisting of 4 bed properties. The first property has an asking price of £565,000 with a floor area of 149 sqm, equating to £3,791 psm. The second property has an asking price of £540,000 and a floor area of 136 sqm, equating to £3,970 psm. See table 6.9 below.
- 6.42 The closest train station to this development is Atherton train station (3.6 miles away). Within Astley there are a choice of amenities in close proximity to the development, including restaurants/takeaways, and a community centre.

Table 6.9 – Asking prices for Windmill Brow

Property Type	Bedrooms	Price	Floor area (sqm)	£psm
Detached	4	£565,000	149	£3,791
Detached	4	£540,000	136	£3,970

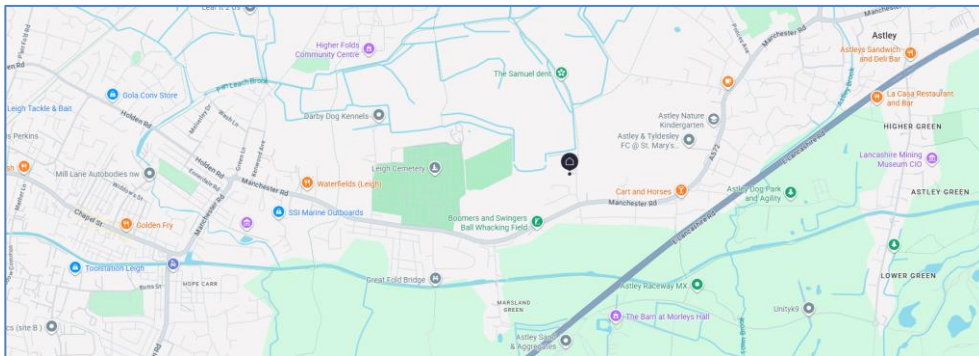
Source: Rightmove, November 2025

Figure 6.20 – Property image for Windmill Brow



Source: Rightmove, November 2025

Figure 6.21 – Location map for Windmill Brow



Source: Rightmove, November 2025

Trilogy development, Farnworth grove, Tyldesley

- 6.43 There are 5 no. properties currently listed at Farnworth grove, Tyldesley, and have been developed by Bellway Homes. The listed properties are detached and semi-detached, consisting of 3 and 4 bed properties. The asking prices for the properties range between £340,995 - £449,995, with floor areas ranging between 84 sqm – 107 sqm. See table 6.10.

- 6.44 The closest train station to this development is Walkden train station (3.1 miles away). Within Tyldesley there are a choice of amenities in close proximity to the development, including restaurants/takeaways, and a choice of supermarkets.

Table 6.10 – Asking prices for Trilogy Development

Property Type	Bedrooms	Price	Floor area (sqm)	£psm
Detached	4	£449,995	107	£4,206
Detached	3	£418,995	93	£4,505
Detached	3	£416,995	93	£4,484
Detached	3	£395,995	97	£4,082
Semi detached	3	£340,995	84	£4,059

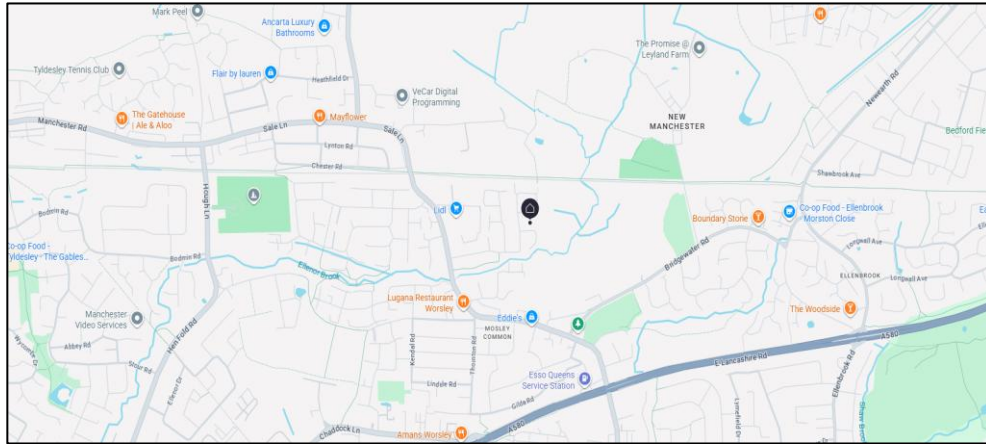
Source: Rightmove, November 2025

Figure 6.22 – Property image for Trilogy development



Source: Rightmove, November 2025

Figure 6.23 – Location map for Trilogy development



Source: Rightmove, November 2025

7 Aspinall Verdi Value Assumptions

- 7.1 Our value assumptions have had regard to both new-build achieved values and asking prices. The achieved values provide a benchmark for the assumptions whilst the asking prices allow us to 'sense check' our assumptions. We are mindful that they are often aspirational and therefore the asking prices cannot always be always achieved.
- 7.2 For the purposes of our area-wide viability assessment, we have applied the following values and floor areas within our financial appraisals. Table 7.1 summarises our assumptions for Absolute Market Values within the 4 defined value areas and Table 7.2 summarises our £psm Market Values within the 4 defined value areas.
- 7.3 For 1 and 2 bedroom new-build apartments there was very limited evidence available, we have therefore made reasonable assumptions based on our market knowledge. To ensure our assumptions are reasonable for the 2 bed apartments, we have added a premium onto our 1 bed apartments.
- 7.4 For our 2-bed house value assumption, we have focused on transactions closest to the floor area we have adopted for our value assumption. This is because there are many transactions with lower floor areas, so we have adopted the ones closest to ensure our value assumptions are accurate.

Table 7.1 – Absolute Market Value Assumptions

Unit Type	Floor Area sqm	Lower Value	Low Medium Value	Higher Medium Value	Higher Value
1 Bed Apartment	50	£125,000	£130,000	£140,000	£145,000
2 Bed Apartment	62	£140,000	£145,000	£155,000	£160,000
2 Bed House	70	£220,000	£245,000	£260,000	£285,000
3 Bed House	102	£310,000	£330,000	£350,000	£365,000
4+ Bed House	130	£395,000	£425,000	£445,000	£480,000

Source: 251103 Wigan Value Assumptions v0.2

- 7.5 Table 7.2 summarises our assumptions for £ per square metre values within the value areas.

Table 7.2 – £ psm Market Value Assumptions

Unit Type	Floor Area sqm	Lower Value	Low-medium Value	Higher-medium Value	Higher Value
1 Bed Apartment	50	£2,500	£2,600	£2,800	£2,900
2 Bed Apartment	62	£2,258	£2,339	£2,500	£2,581
2 Bed House	70	£3,143	£3,500	£3,714	£4,071
3 Bed House	102	£3,039	£3,235	£3,431	£3,578
4+ Bed House	130	£3,038	£3,269	£3,423	£3,692

Source: 251103 Wigan Value Assumptions v0.2

- 7.6 As shown previously in this market paper the value zones within the borough of Wigan achieve a range of values.
- 7.7 Most developers benefit from varying levels of economies of scale and the specification of their product is typically tailored to a specific target market. Some developments are even of a scale where they benefit from a ‘placemaking’ premium where they may require extra land to deliver communal facilities such as open green space and child play facilities.
- 7.8 Developers in some cases exclusively deliver executive homes or luxury family homes which typically achieve a premium over the standard volume housebuilder stock; however, these are not typically representative of the wider new-build market and are often discounted or take less precedence in our analysis.
- 7.9 To find the final value assumptions we have analysed the New Build Achieved data from the Land Registry Price Paid Dataset for houses and flats within Wigan and cross checked these against the new-build asking prices. Although we are mindful that asking prices are aspirational, it is important to take into consideration that the achieved data includes values from up to two years ago, therefore the asking prices are likely to be more reflective of the current market.
- 7.10 The average values within the lower, low-medium, higher-medium and higher zones varied for the flats and houses. There was a large amount of data from the New Build

achieved houses, which helped us gain a more accurate understanding of the values for each area.

8 Affordable Housing Transfer Values

8.1 The Local Housing Needs Assessment (October 2024) ⁹ states that

8.2 *“The recommended affordable tenure mix is 49% social rented, 28% affordable rented and 23% affordable home ownership. This broadly translates to a 75% rented and 25% affordable home ownership split, with a particular emphasis on the need to deliver social rented homes.”*

Table 8.1 – Affordable Housing Transfer Value Assumptions

Tenure	AH Tenure Mix	AH Value (% of MV)
Affordable Rent	30%	70%
Social Rent	45%	50%
Shared Ownership	25%	70%

Source: Wigan Council LHNA, 2024

8.3 This meets the NPPF requirement where in paragraph 65 and 66 it states¹⁰:

“Provision of affordable housing should not be sought for residential developments that are not major developments, other than in designated rural areas (where policies may set out a lower threshold of 5 units or fewer). To support the re-use of brownfield land, where vacant buildings are being reused or redeveloped, any affordable housing contribution due should be reduced by a proportionate amount”.

“Where major development involving the provision of housing is proposed, planning policies and decisions should expect that the mix of affordable housing required meets identified local needs, across Social Rent, other affordable housing for rent and affordable home ownership tenures”.

8.4 These values are based on local evidence and reflect what Registered Providers are typically able to pay in the local market, ensuring deliverability while maintaining viability for developers.

⁹ Wigan LHNA final report

¹⁰ National Planning Policy Framework

9 Specialist Accommodation for Older People

- 9.1 This section of the report focuses on the specialist accommodation for older people. We set out a summary of our understanding of the various types of housing for older people and undertake a review of the current market within the area.

Specialist Accommodation for Older People Defined

- 9.2 There is a separate section of the PPG to help guide Councils in preparing policies on housing for older and disabled people (published 26 June 2019). The PPG recognises the necessity to plan for the housing needs of disabled people:

‘The provision of appropriate housing for people with disabilities, including specialist and supported housing, is crucial in helping them to live safe and independent lives. Unsuitable or unadapted housing can have a negative impact on disabled people and their carers. It can lead to mobility problems inside and outside the home, poorer mental health and a lack of employment opportunities. Providing suitable housing can enable disabled people to live more independently and safely, with greater choice and control over their lives. Without accessible and adaptable housing, disabled people risk facing discrimination and disadvantage in housing. An ageing population will see the numbers of disabled people continuing to increase and it is important we plan early to meet their needs throughout their lifetime.’¹¹

- 9.3 The PPG recognises the diversity of specialist housing including:
- Age-restricted general market housing: This type of housing is generally for people aged 55 and over and the active elderly. It may include some shared amenities such as communal gardens, but does not include support or care services.
 - Retirement living or sheltered housing: This usually consists of purpose-built flats or bungalows with limited communal facilities such as a lounge, laundry room and guest room. It does not generally provide care services, but provides some support to enable residents to live independently. This can include 24-hour on-site assistance (alarm) and a warden or house manager.
 - Extra care housing or housing-with-care: This usually consists of purpose-built or adapted flats or bungalows with a medium to high level of care available if required, through an onsite care agency registered through the Care Quality Commission

¹¹ MHCLG, 26 June 2019, Paragraph: 002 Reference ID: 63-002-20190626

(CQC). Residents are able to live independently with 24-hour access to support services and staff, and meals are also available. There are often extensive communal areas, such as space to socialise or a wellbeing centre. In some cases, these developments are known as retirement communities or villages - the intention is for residents to benefit from varying levels of care as time progresses.

- Residential care homes and nursing homes: These have individual rooms within a residential building and provide a high level of care meeting all activities of daily living. They do not usually include support services for independent living. This type of housing can also include dementia care homes.

9.4 The PPG states that:

‘There is a significant amount of variability in the types of specialist housing for older people. The list above provides an indication of the different types of housing available but is not definitive. Any single development may contain a range of different types of specialist housing.’¹²

9.5 In this respect we have appraised generic retirement living / sheltered housing schemes typically delivered by developers such as McCarthy & Stone or Churchill retirement living.

9.6 We set out below the existing evidence base in respect of Older Persons housing.

Existing Evidence Base

9.7 We have reviewed the existing evidence base to formulate our assumptions and understanding of older person housing provision in Wigan. This is outlined below.

Wigan LHNA (October 2024)

9.8 Much of the market analysis and commentary on the private residential market is equally as applicable to supported living. Consistent with national trends, Wigan has an ageing population. The key comments are summarised below:

9.9 There are currently around 4,904 units of specialist older persons’ accommodation comprising 2,291 specialist older accommodation units (Use Class C3), 401 Extra Care units (Use Class C2), and 2,212 residential care bedspaces (Use Class C2).

¹² Ibid, Paragraph: 010 Reference ID: 63-015-20190626

- 9.10 Over the next few decades, there will be a marked increase in the number and proportion of older residents. The population aged 65+ years is expected to increase by 29.2% from 65,776 in 2023 to 84,974 in 2041. This age category is expected to be the largest increase out of the population.
- 9.11 There is a modelled need for 8,387 more units of accommodation for older people by 2041. This includes sheltered/retirement, Extra Care, co-housing, and residential care and need is usually considered with reference to planning use classes. In the context of older persons accommodation, C2 relates to residential accommodation providing care such as a nursing or care home; C3 relates to houses, flats and bungalows that are built specifically for older people and can include sheltered and retirement accommodation.
- 9.12 It is estimated there is a need for 6,284 additional C3 dwelling units over the period 2023 to 2041 or 349 each year, a need for 1,528 C2 Extra Care units or 85 each year, and 575 C2 residential care bedspaces or 32 each year.
- 9.13 Based on an assessment of additional needs and longer-term demographics, 3.6% of new dwellings (35 each year) should be built to M4(3) wheelchair accessible standard and all other new dwellings should be built to M4(2) accessible and adaptable standard, which would include bungalows/level access accommodation.

Specialist Accommodation Asking Prices – New Build

- 9.14 We have reviewed new-build sheltered housing developments, however there are none available on the market for full market value.
- 9.15 We have also reviewed McCarthy & Stone and Churchill Retirement Living for available retirement developments within the area however, neither developer is currently active in Wigan.

Specialist Accommodation Asking Prices – Second-hand

- 9.16 There are currently no new build retirement properties on the market in Wigan. Therefore, we have used properties that are second-hand as evidence meaning the properties are of poorer quality compared to modern new-build provision.
- 9.17 We have also reviewed the current stock of second-hand retirement properties using Rightmove to gain an understanding of the asking values associated with second hand, specialist accommodation.

- 9.18 There are currently 4 retirement properties on the market that fall within the following wards; Standish with Langtree and Orrell.

Orrell

- 9.19 There is 1 no. second-hand 2-bedroom flat available with a floor area of 55 sqm with an asking price of £118,000 in Mountfield Court, Orrell. Given the price and floor area for this property, this equates to £2,145 psm.

Standish

- 9.20 There is 1 no. second-hand 1-bedroom flat available in Wellington Place with an asking price of £220,000. The property has a total floor area of 58 sqm equating to £3,793 psm.
- 9.21 There are 2 no. second hand flats available in Brideoake Court with asking prices ranging between £200,000 - £279,999.
- 9.22 The first property is a second-hand 1-bedroom flat with an asking price of £200,000 and a floor area of 66 sqm equating to £3,030 psm.
- 9.23 The second property is a second-hand 2-bedroom flat with an asking price of £279,999 and a floor area of 82 sqm equating to £3,414 psm.

Specialist Accommodation for Older People Value Assumptions

- 9.24 The Retirement Housing Group¹³ acknowledges that sheltered housing values carry a premium on typical private residential apartments.
- 9.25 The RHG group states that specialist accommodation typically achieves a 10-15% premium on market value 1-, 2-bed flats.
- 9.26 Due to there not being any new build retirement properties, we have based our assumptions on the market value of new build flats within the lower value zones. We have then taken into consideration the limited amount of second-hand asking prices available to cross check our specialist accommodation assumptions.

¹³ RHG Retirement Housing Group, Retirement Housing Viability Base Data (April 2013) / Briefing Paper for CIL Practitioners Retirement Housing and the Community Infrastructure Levy (June 2013) by Churchill Retirement Living and McCarthy and Stone

- 9.27 This was on the basis that if the scheme is viable in the lower value area, it will be viable in the higher value area. We have run sensitivity testing to show how increases or decreases in market value up to 20% impact the viability of the scheme.

Table 9.1 – Retirement Living / Sheltered Housing Value Assumptions

No. of Beds	Unit Price including 10% premium	Floor Area (sqm)	Price psm
1-Bedroom	£137,500	50	£2,750
2-Bedroom	£154,000	62	£2,483

Source: AspinallVerdi (November 2025)

- 9.28 To reflect that values for new-build sheltered housing units could be higher, we have added a 10% premium to the market values of new build flats in the lower value zone.
- 9.29 We have used the lower value zone assumptions to show if the scheme is viable here, then it will only improve in the higher value zones, which will show in the sensitivity tables on the appraisals.

Older Persons Cost Assumptions

- 9.30 Table 9.2 below outlines the cost assumptions (where different from general needs housing).

Table 9.2 – Older Persons Cost Assumptions

Typologies	Build Cost	Comments
“Supported Housing Generally”	£2,260 psm	Median BCIS – Supported Housing Generally (Rebased to Wigan, last 5 years)
External Works	+10%	These schemes generally have fewer external areas (e.g. less car parking). This is consistent with the higher development density assumptions.

Source: AspinallVerdi, November 2025

10 Build to Rent

- 10.1 This section considers evidence to inform the rental values for the Build to Rent (BTR) accommodation in Wigan.
- 10.2 BTR is in effect its own asset class and is a subsidiary of the wider private rented sector which includes private landlords, institutional and large corporate investors.
- 10.3 This section refers to evidence from the rented sector in general, where information is specifically related to BTR we explicitly state this. We have assumed the floor areas are consistent with the new build flats found in Table 4.5 of this report.
- 10.4 For clarity, we have assumed a 1-bed flat is 50sqm and a 2-bed flat is 62 sqm for the BtR units.

National Context

- 10.5 The private rented sector statistics in England 2025 state that the average monthly rent in England is £1,354 in the 12 months to September 2025¹⁴. The property size with the highest monthly rent was properties with four or more bedrooms (£2,021). Single rooms had the lowest monthly rent of all property sizes, at £1,099 pcm.
- 10.6 The interquartile range increased with property size. The spread of rents was greatest for the "four or more bedrooms" category because of the inclusion of very large properties. The correspondingly higher rents of these large properties drove the sharp increase in both median rent and spread of rents in this category compared with three-bedroom properties.

Local Context

- 10.7 In terms of market rental evidence, we have reviewed each of the value zones separately. This is to understand the differences in rental values across Wigan.
- 10.8 When looking for comparable evidence, we have specifically looked for Build to Rent flats of good quality design and specification. For clarity, we have not included flats above a shop, or older second-hand stock. This has meant in some of the wards, there

¹⁴ [Private rent and house prices, UK - Office for National Statistics](#)

is no data, and so we have made reasoned assumptions based off the other value zones.

Lower value zone

10.9 We have reviewed flats which are currently for rent within the lower value zone:

Table 10.1 – Rents in lower value zone

Property Type	No. of units to let	Rent pcm (average)
1 Bed Flat	2	£775
2 Bed Flat	8	£700

Source: Rightmove (November 2025)

10.10 There were only two 1-bedroom flats listed at the time of this report within the lower value zone. The first flat in Douglas was listed at £725 pcm, and the second was listed on Twist Lane in Leigh Central & Higher Folds at £825 pcm.

Low-medium value zone

10.11 We have reviewed flats which are currently for rent within the low-medium value zone:

Table 10.2 – Rents in low-medium value zone

Property Type	No. of units to let	Rent pcm (average)
1 Bed Flat	2	£650
2 Bed Flat	9	£770

Source: Rightmove (November 2025)

Higher-medium value zone

10.12 We have reviewed flats which are currently for rent within the higher-medium value zone:

Table 10.3 – Rents in higher-medium value zone

Property Type	No. of units to let	Rent pcm (average)
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1 Bed Flat	0	£0
2 Bed Flat	2	£750

Source: Rightmove (November 2025)

- 10.13 There was no good quality second-hand 1-bedroom flats available for the higher-medium value zone at the time of this report.

Higher value zone

- 10.14 We have reviewed flats which are currently for rent within the higher value zone.

Table 10.4 – Rents in higher value zone

Property Type	No. of units to let	Rent pcm (average)
1 Bed Flat	1	£675
2 Bed Flat	3	£770

Source: Rightmove (November 2025)

Investment Yield

- 10.15 Investment yields are difficult to determine in the Build to Rent sector. Yields vary significantly by location, the quality of the stock and particularly the management approach. The landlord will be responsible for a number of costs including the operating costs and market risk. The latter has a significant impact on the net operating income (net rent). Prospects of rental growth and wider factors such as financing costs and regulatory risks also need to be reflected in the investment yield applied.
- 10.16 We have reviewed the Knight Frank Prime Yield Guide (August 2025). This shows the yields of 4.75% for Build to Rent in Tier 2 Regional Cities.
- 10.17 We have capitalised the net rental income by a yield of 4.75%. It must be stressed that wider economic factors will also influence the yield expectations of investors and with uncertainty in the market place, this is subject to change.

Build to Rent Value Assumptions

- 10.18 Table 10.5 sets out our BTR value assumptions.

Table 10.5 – Build to Rent Value Assumptions

	Zone 1 – Low Value	Zone 2 – Low-Medium Value	Zone 3 – Higher-Medium Value	Zone 3 – High Value
1 Bed rent (£ pcm)	£600	£650	£675	£700
2 Bed rent (£ pcm)	£675	£725	£750	£770
Management costs (%)	25%	25%	25%	25%
Yield (%)	4.75%	4.75%	4.75%	4.75%

Source: AspinallVerdi (November 2025)

Net Rental Assumptions

10.19 We have assumed a 25% deduction from the gross headline rent to the net rent. This is to take into consideration the cost of: Void Loss / Write-offs / Expend on Voids; Regular Maintenance / Insurance / Utilities; Management Fees / Letting Costs; and Major repairs / refurb (SF) etc.

Build to Rent Cost Assumptions

10.20 The table below outlines the cost assumptions (where different from general needs housing).

Table 10.6 – Build to Rent cost assumptions

Typologies	Build Cost
Build costs for “Flats Generally”	£2,522 psm Median BCIS – 6+ Storey Flats Generally (Rebased to Wigan, last 5 years)
External Works	+10% These schemes generally have fewer external areas (e.g. less car parking). This is consistent with the higher development density assumptions.

Purchasers Costs	6.25%
Profit on cost	15%

Source: AspinallVerdi, November 2025

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