



Trafford Council

**Economic
Assessment**

April 2009

Trafford's Economic Assessment

Introduction	3
The Current Trafford Economic Development Plan	4
The Policy Context	5
National & Regional	5
Sub Regional Context	7
Local Context	8
Trafford Key Facts	10
Trafford's strategic location in the Greater Manchester City Region	10
Trafford: People	11
Quality of Life & the Sustainable Community Strategy	11
Population Structure and Change	12
The Labour Market	14
Skills and Employers	16
Economic Inclusion: Deprivation, Equalities & Barriers	19
Deprivation in different areas	20
Key Benefit Claimants & Worklessness	20
Trafford: Business	23
Economy: Drivers of Productivity, Industrial Structure and Economic Forecasts	23
Centre for Enterprise	26
Productivity: Gross Value Added	27
Locations and Sizebands of Business in Trafford	28
Key Centres of Business in Trafford	31
Trafford: Place	35
Employment Land	36
Transport	37
The Public Transport Network	37
Roads and Cars	38
Housing	40
Environment	44
Water	46
The Visitor Economy & Tourism	48
Town Centres	52
Altrincham	53
Sale	55
Stretford	57
Urmston	59
Key Questions	62

Introduction

The purpose of this document is to provide an Economic Assessment of Trafford that will form the evidence base to support the production of a revised Economic Development Plan for the Borough.

The new plan will articulate the Borough's economic development priorities for the next three years and begin to shape the vision for the Trafford economy for the next ten to fifteen.

This assessment has drawn on a vast array of information sources in relation to the economy and has applied the Greater Manchester Forecasting Model in order to assess the current situation.

The current Trafford EDP came to an end in March 2009 and it is the responsibility of the Trafford Economic Alliance (TEA) to take stock of what has been achieved so far.

TEA also needs to articulate what it will do next in order to continue successfully co-ordinating and driving forward the economic development agenda in Trafford.

What follows is that assessment, which can be used to consult key strategic partners and stakeholders in order to start to shape the Trafford EDP 2009 -2012.

The initial task of reviewing the following assessment of Trafford's economy began with the Trafford Economic Alliance on the 23rd February 2009 and it is this partnership that will lead a consultation that will take place over a following 12 week period.

The assessment is separated into **6 key areas** :

- 1. Introduction & the Current Trafford Economic Development Plan**
- 2. The policy/political context**
 - National & Regional
 - Sub-regional
 - Local Level
- 3. Trafford: Key Facts**
- 4. Trafford's People**
- 5. Trafford's Businesses**
- 6. Trafford, the Place**
- 7. Key Questions**

The Current Trafford Economic Development Plan

Following considerable consultation with key strategic partners and stakeholders, the current Trafford Economic Development Plan (EDP) was produced by the Trafford Economic Alliance in April 2006. In the first instance the EDP has been used to successfully influence and, more importantly, feed into, national, regional and sub regional strategies and policy frameworks covering competitiveness, skills and employment, urban renaissance and building sustainable communities.

The Trafford EDP has had a critical impact on these agendas at both a Regional & Sub Regional level. For example the North West Development Agency, which previously had a more direct approach to funding projects at a sub regional level, has been commissioning programmes agreed in the Greater Manchester Economic Development Plan. By producing its own EDP Trafford has been able to position itself and demonstrate how the regional & sub-regional priorities can be delivered through local actions, detailed in the Trafford Economic Development Plan.

For the future and in response to emerging new frameworks and structures, Trafford will need to continue to demonstrate how it will go on supporting the development of the Greater Manchester and North West economy.

In line with the emerging Regional Strategy and the Sub Regional Strategy, any future Economic Development Plan for Trafford, will need to continue to provide strategic direction for the investment priorities and the delivery plans of a range of key strategic partners such as North West Development Agency, Government Office for the North West, The Greater Manchester Learning and Skills Council, Jobcentre Plus, Connexions, Business Link, the inward investment agency, MIDAS, the Manchester Knowledge Capital Partnership and other local implementation bodies.

Having the right Economic Development Framework in place, over the past three years the Trafford Economic Alliance has been able to rationalise its priorities into three main areas and set up smaller thematic groups to concentrate on working on projects and programmes that are now beginning to facilitate the delivery of those priorities. The groups and projects are represented below:



The Policy Context

National & Regional

National Government's review of Sub National Economic Development and Regeneration (SNR), published in July 2007, fundamentally alters the strategic policy context for Economic Development and Regeneration across England.

The review sets out a number of very specific policy changes in some areas, whilst in others it has signalled that further work is required.

The national policy framework that the SNR sets out reflects the direction in which partners in the Northwest are already travelling and will enable the Region and the Greater Manchester Sub Region to continue to build on the strong partnership approach that they already have in place.

Through SNR there has been a fundamental shift in the way the NWDA will undertake its business. They will increasingly move away from being a delivery organisation to being a strategic one.

Despite this, the NWDA will retain important delivery functions around business support, where Government has endorsed regional delivery models to ensure maximum efficiency and economies of scale and support Business Support Simplification.

The rationale for this has been supported by the Agency's corporate strategic review and corporate plan.

It is this Plan which has determined the Economic Development and Regeneration Strategic Policy direction across the North West and not least across the Greater Manchester Sub Region.

Its conclusions are that the NWDA will:

- Have responsibility for drawing up a **single regional strategy** covering economic, transport, housing, planning, social and environmental objectives bringing together the Regional Economic Strategy, Regional Spatial Strategy and Regional Housing Strategy and including a delivery plan and resources.
- Be tasked around outcomes (with no output targets) with the focus on a single overarching growth objective for the region – GVA per head.
- Reform its delivery moving more from projects to programmes and delegating decisions to local and sub-regional level taking account of Multi Area Agreements (MAA) where they have been agreed.
- Work within a reformed accountability framework which will see the Regional Assembly cease in its current role and function by 2010 but will involve Local Authority scrutiny and accountability through a Regional Minister.

The Corporate Objectives that have been agreed by the NWDA on behalf of our Region, have provided the North West's response to and proposed implementation of the findings of the SNR.

Since the findings of the SNR, the UK and Northwest economies have fallen into recession. This is affecting the different parts of the region in varying ways. Working with national Government, the region has put in place immediate actions to enable businesses, communities and individuals to manage the effects of an economic downturn. But it is also important to position the region for future sustainable recovery and long term resilience and success and to think about the future drivers of the regional economy.

We all acknowledge that there will be lessons that we will need to learn from this recession, as well as dealing with the aftermath of it. However, as a region we need to think carefully about the nature of future growth. Big questions include the importance of the retail sector and the high street in the future, if financial services will drive growth again, a possible rapid shift in consumption patterns, and identifying the opportunities arising from the recession.

With the current economic conditions in mind, it is more important than ever that we work with Central Government, and continue to monitor the progress of our regional economies against the GVA/head objective and five outcome focused indicators that have been agreed:

- GVA/hour worked
- Employment rates;
- Basic, Intermediate and Higher Level Skills rates
- R&D as a percentage of GDP;
- Business Start up rates.

In order to respond to this, the NWDA has agreed 11 corporate objectives based on the RES and designed to improve competitiveness and productivity across the region’s Business, People and Places. The NWDA is now consulting on these across regional partners. They reflect the totality of NWDA’s responsibilities, and focus on delivery of the specific actions in the Regional Economic Strategy on which NWDA leads delivery. These are summarised below:

Competitive Business	
1	Support the development of internationally competitive sectors
2	Improve the formation, survival and growth rates of enterprises
3	Develop higher added value activity through innovation
4	Realise opportunities from globalisation
Competitive People	
5	Develop leadership and management skills in the current workforce
6	Develop intermediate and higher level skills in the current workforce
7	Grow the size of the workforce
Competitive Places	
8	Support the development of major employment sites and premises
9	Improve the physical conditions for private sector investment
10	Ensure the implementation of the Climate Change Action Plan
11	Improve the image of the region to businesses and visitors

Sub Regional Context

Placing the North West's City Regions at the heart of achieving our economic growth aspirations and delivering the commitments that has been made by the Northwest Development Agency is critical and non more so than the Manchester City Region.

Because of the Manchester City Region's role, we have produced a City Regional Development plan (CRDP2) and the GM Sub Regional partnership has set up a governance/ partnership structure through which its priorities can be delivered.

These priorities are articulated in the Greater Manchester Multi Area Agreement (GM MAA), agreed with national government in June 2008

GM MAA Building Blocks:

- Building Block 1** - The Greater Manchester Strategic Plan
- Building Block 2** - Reducing Worklessness
- Building Block 3** - Strengthening our Skills Offer
- Building Block 4** - Achieving more for 14-19 year olds
- Building Block 5** - Accelerating Business Expansion to Generate Growth
- Building Block 6** - Enhancing Investment, Knowledge and Innovation
- Building Block 7** - Ensuring the city region's critical infrastructure will sustain our economic growth
- Building Block 8** - Meeting the housing needs of a competitive Manchester City Region

Building Block 1 of the MAA commits to the preparation of a Greater Manchester Strategy. The primary purpose of the Greater Manchester Strategy is to:

- Provide a clear and shared vision for the future of Greater Manchester;
- Provide an integrating framework for the work of the Strategic Commissions to ensure delivery of that vision;
- Influence national and regional policy to increase the resources available to Greater Manchester and the flexibility regarding how these resources are allocated;
- Position Greater Manchester to effectively implement the freedoms and flexibilities awarded through statutory City Region status, with a longer-term aim to develop a statutory Greater Manchester Plan.

Whilst the preparation of the GMS is underway there is a statutory requirement for Trafford to undertake a robust assessment of its economy and this will inform Trafford's consultation on the Economic Development Plan for the Borough.

Local Context

It is widely acknowledged that Trafford is a key driver in the regional and sub regional economy. The assets and opportunities within the Borough have helped to fuel growth and without them any future growth of the City Region will be severely constrained.

Ensuring that Trafford is able to deliver its true potential is one of the key priorities identified by the Trafford Economic Alliance (TEA) and the Trafford Local Strategic Partnership. This has been clearly articulated in the Trafford Community Strategy and the current Trafford Economic Development Plan. This has allowed TEA to herald Trafford as a regional asset.

Over the past eighteen months, we have continued to work to build Trafford’s competitive advantage, sought to create the best possible conditions for market investment and explored the ways that we can intervene where the market is not currently able to deliver our economic aspirations.

However, if we are to be successful in managing the current economic conditions as well as creating the right conditions for sustainable growth we need much better alignment of economic development and skills priorities. Maximising the potential of our future workforce will facilitate this process more effectively.

The National, Regional, Sub – Regional and Local Policy Context



The Strategic Context : Key questions

The single regional and sub-regional strategies will include transport, housing, planning, social and environmental issues as well as economic development.

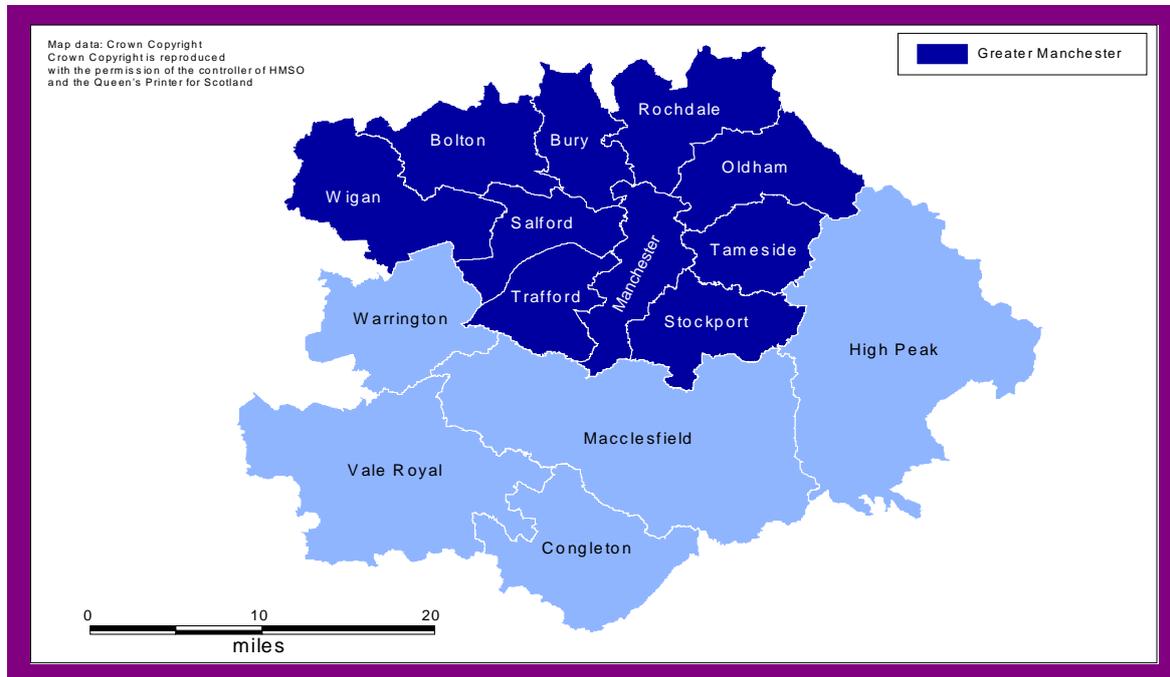
1. How will this influence and support our local economic development priorities?

The NWDA is reforming its delivery moving more from projects to programmes and delegating decisions to local and sub-regional levels.

2. How can we best position Trafford to take advantage of this?

Trafford Key Facts

Trafford's strategic location in the Greater Manchester City Region



Outside Manchester City Centre, Trafford has the best performing economy in the sub region and with the City Centre forms the engine powering the Greater Manchester City region. It has developed the conditions within which effective and sustainable growth can be generated and has a highly diversified economy built around higher value added activity.

Trafford is some 41 square miles and home to 212,200 people living in 92,200 dwellings. These residents make up 9% of total GM population.

The borough supports in the region of 123,800 employee jobs and is a net contributor of Jobs with more than 1 job per head of population. Of our 10,900 businesses, 68% of them employ less than 5 staff.

In Trafford, we have the highest proportion of companies per head of population in the city region with our 49 firms per 1,000 residents (34 in GM overall) delivering 12.8% of Greater Manchester's GVA. Trafford contributes 17% of GM's start-ups, a high proportion of which are in key growth sectors: the Enterprise capital of the NW.

Trafford's GVA of £5.2bn (5% of NW and 12.8% of GM), compares with £41bn for Greater Manchester and £104bn for the North West . Trafford has 42% above average GVA for GM.

We also have high skill levels and above average levels of economic activity. Add to this a cluster of iconic sporting and cultural attractions and long established industrial and commercial areas of significant size and it is evident why Trafford is a high quality environment in which to live, learn, work and relax.

Trafford: People

Quality of Life & the Sustainable Community Strategy

The Trafford Partnership is the Borough's Local Strategic Partnership, a single body which brings together more than 100 organisations including local and regional partners from across the public, private, voluntary and community sectors. As ambassadors for the local area, members of the Trafford Partnership are committed to promoting Trafford as an excellent place to live, learn, work and relax and to start and grow a business. By working together effectively the partnership believe they can be even better.

The Partnership is progressing towards achieving the commitments and vision set out in the Sustainable Community Strategy, the Vision states: '*Trafford is thriving, diverse, prosperous and culturally vibrant. A Borough at the heart of the Manchester City Region celebrated as the enterprise capital of the North West and home to internationally renowned cultural and sporting attractions.*'

By 2021:

- All Trafford's people and communities will enjoy the highest quality of life in a safe, clean, attractive, healthy and sustainable environment with excellent education and first-class services.
- Trafford businesses will be provided with all the tools and support to be able to continually and successfully compete for skills and investment on an international basis.
- As a destination, Trafford will consolidate and build upon the reputation of its renowned world-class attractions (Manchester United, Lancashire County Cricket Club, Imperial War Museum North and the Trafford Centre) providing a breathtaking mix of cultural, sporting, heritage and natural attractions together with vibrant town and shopping centres.

Trafford is one of the most sought after locations to live in the north of England. It is easy to see why with its high quality environment, strong and diverse economy, efficient and integrated transport and an enviable collection of internationally renowned sporting, cultural and leisure attractions. Through excellent education our primary, special, grammar, high schools and college together achieve amongst the very best results in the country. We are proud of Trafford's track record in the efficient delivery of public services, but want to improve even further.

Trafford has a strong and diverse economy offering a wide range of employment and business opportunities and is home to the oldest and largest industrial park in Europe, Trafford Park.

Our four town centres (Altrincham, Sale, Stretford and Urmston) make up the heart of the Borough, adding individual character and providing vibrant places for people to enjoy living, working, shopping and leisure. The majority of people in Trafford feel that their local area is an attractive and harmonious place to live.

Population Structure and Change

Trafford has always supported a healthy population density, given its size and geographical make up and these levels have remained relatively constant over the last 15 years. Trafford's population reached a low of 209,600 in 2002, rising to 212,200 in 2007.

Despite the constancy in terms of numbers, there have been subtle changes in the structure of the population due to a number of influences. These changes in structure are attributable to a falling birth rate and improved levels of health leading to increased life expectancy, resulting in a gradually ageing population.

In the future, there will be a lower ratio of people of working age to people of pensionable age: currently, that ratio stands at 3.3 working age people for each person of pensionable age, but that is forecast to change to 3.0 by 2026.

Another factor that has impacted on Trafford's population is international migration, in particular, the number of people migrating into Trafford from the eastern European states: this has increased drastically since their accession to the European Union in 2004 and 2007.

Forecasts for migration from both the Office for National Statistics and Greater Manchester Forecasting Model agree that overall patterns of international migration into Trafford are unlikely to change significantly over the next 10 years.

The ethnic make up of Trafford's population reflects that of Greater Manchester and the Country as a whole, yet ethnic diversity is concentrated in the neighbourhood in the north of the Borough, Old Trafford.

The Population of Trafford by Age Group, 1981-2026

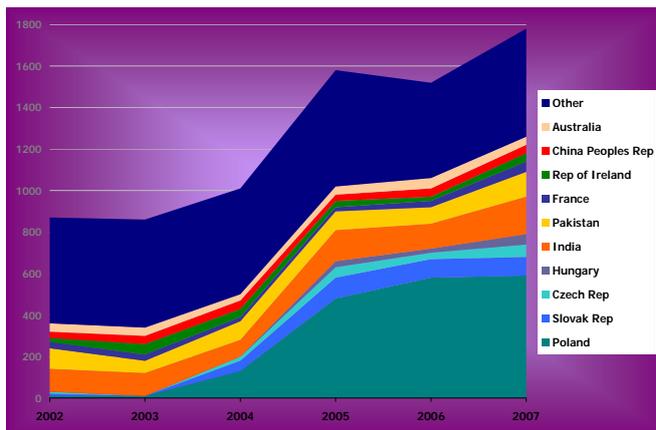


The graph opposite shows that in 1981, children made up 21% of the population, yet by 2026 they are expected to make up 19% of the population.

Conversely, in 1981 people of pensionable age made up 17% of the population but currently make up 19% of the population. By 2026, they will make up over 20% of those living in Trafford.

Source: Greater Manchester Forecasting Model, 2007 baseline

National Insurance Registrations by Adult Overseas Nationals



This chart shows an increase in inward migration to Trafford from 2002 to 2007.

In particular it identifies the impact of European Union Enlargement in May 2004, when we see a significant increase in workers from the new member states, particularly Poland.

Source: Department for Work and Pensions NI Registrations

Ethnicity of Trafford's population



The ethnic make up of Trafford's population has altered only slightly over the five years from 2001 to 2006. And although we have seen a significant increase in inward migration from 2004 to date, this has and will continue to have little impact on the existing ethnic diversity of Trafford

Source: ONS Estimated Resident Population by broad ethnic group, September 2008

In Conclusion:

Although Trafford enjoys the benefits of a stable population level, considerations need to be given to the implications that a change in the make up of that population will have.

The predicted increase in the number of older residents coupled with a decline in the proportion of children will have an impact on our public services, in terms of how and what we provide. The cost of providing facilities and services for people as they age will increase and likewise the number of people contributing to that cost will decrease.

In the longer term the recent announcement from National Government that there has to be a balance between the number of people migrating into the UK and the number of people leaving, as part of a policy to enable UK population to decrease to a long-term environmentally sustainable level, will potentially have an impact on the level of Trafford population and the supply of labour to support any change in economic conditions.

The Labour Market

This section covers the qualifications and occupations of Trafford's residents and workforce in addition to the employment rates of different groups and variances in income.

Education levels in Trafford are traditionally higher than regional and national averages. Despite this there are pockets of the borough where qualification levels are low.

Trafford's high educational attainment levels are illustrated by the fact that we are consistently one of the best performing authorities in the country for GCSE passes at 16yrs. In 2007, 75% of pupils gained at least 5 A-C grade GCSEs compared to the national average of 61%.

Although 93% of young people aged 16-19 in Trafford are in employment, education or training, this still leaves 7% who once leaving school are not, in common with national levels.

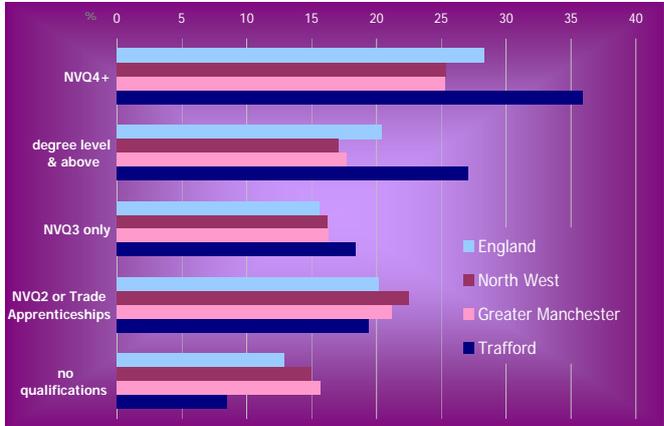
It follows that with a high educational attainment level, comes a well skilled resident workforce, with a higher proportion of that workforce being employed in professional occupations. Compared to national and regional averages Trafford's resident population are well represented in managerial and other professional and technical occupations.

Employed, self employed, full and part time workers are all represented in Trafford's residents and workforce, too. 70% of the workforce in Trafford consists of full time employees, in line with the national average (68%). Part time work is projected to grow to make up more of the workforce: from 26% of the workforce in 1991, it now makes up 31%; by 2026 this is projected to reach 34%.

Given Trafford's overall high employment figures, Trafford's employment rates across all groups are higher than the national averages and substantially higher than regional and sub regional averages.

Annual pay is also higher on average for Trafford's workforce than anywhere in Greater Manchester (apart from Manchester) at £20,700, which is above the national average of £20,300.

Qualifications of Residents, 2007

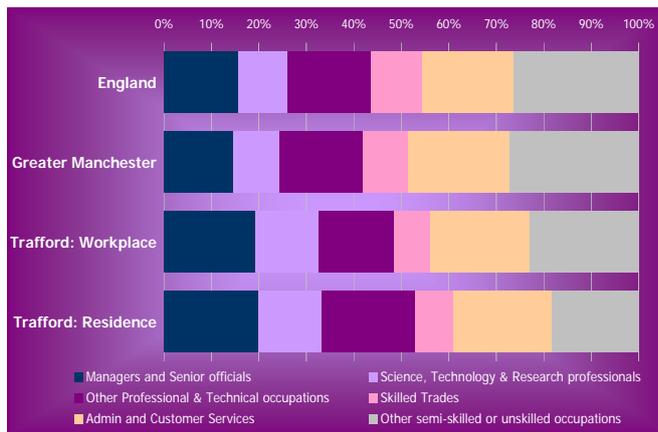


The chart opposite shows that over 25% of Trafford's population are educated to degree level and almost 50% are qualified to NVQ2, NVQ3 or have trade apprenticeships, whilst just under 10% have no qualifications at all.

In each case this compares favourably to Greater Manchester, regionally and nationally.

Source: Annual Population Survey, ONS Crown Copyright, from Nomis 21.7.08

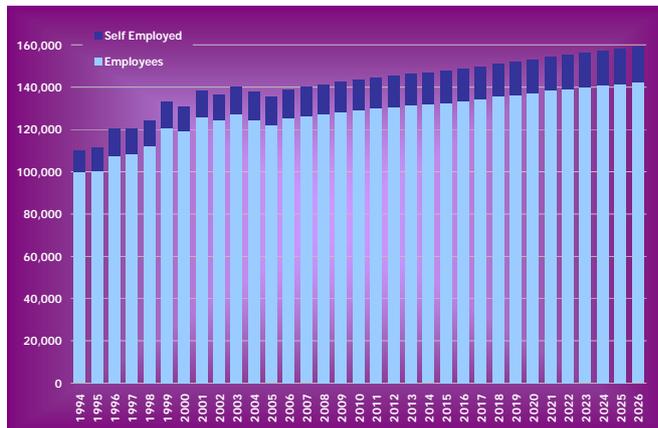
Occupations of the population, 2007



18% of Trafford's residents work in semi-skilled or unskilled occupations compared to the national average of 26%, whilst over 30% of Trafford residents are employed as Managers and Senior Officials or in Science, technology and research professions compared to nearly 20% in Greater Manchester and nationally.

Source: Annual Population Survey, ONS Crown Copyright, from Nomis 29.10.08

Trafford's Workforce: Employees and Self Employed history and projections



12.5% of total jobs in Trafford are self-employed, higher than 11.2% in the North West and 10.9% in Greater Manchester. These are all however lower than the national figure of 13.4% (APS 2007). Self-employment is more likely in construction, business services and personal services than in other sectors.

The strong self-employed sector is projected to grow over the next 20 years: in fact, it is growing faster than the number of employees, with 22% growth forecast compared to 14% growth in employees.

Source: Greater Manchester Forecasting Model, Oxford Economics, 2007 baseline

Skills and Employers

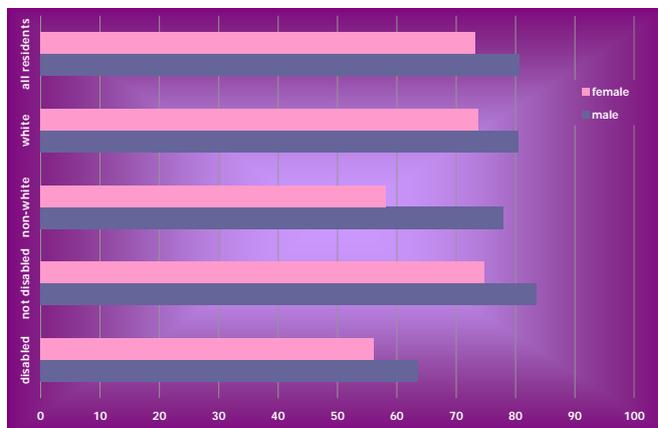
Skill Type	% of those Employers who report a skills gap
Technical, practical or job-specific	57%
Customer handling	54%
Team working	45%
Problem solving	40%
Oral communication	38%
Management	32%
General IT user	29%
Written communication	20%
Office admin	18%
IT professional	13%
Literacy	10%
Foreign language	9%
Numeracy	6%

Just over 12% of Trafford's businesses are reporting skills gaps, which is among the lowest proportions in Greater Manchester and well below the national average of over 15%.

The larger the company, the more likely they are to report skills gaps; smaller businesses in Trafford, those employing less than 5 staff, show far lower skills gaps than any other area in the country – over 97% of these businesses report no skills gaps, but the national average is only 92%.

Source: National Employers Skills Survey 2007, LSC

Employment Rates, Trafford 2007



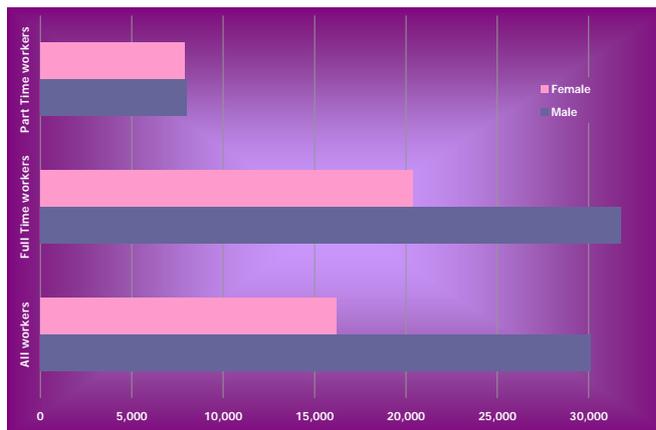
The employment rates of Trafford's residents are higher than the national rate by 7-8%. However, this still leaves a disparity between white people in employment (77%) and non-white people in employment (69%).

The disparity between disabled and non-disabled Trafford residents in employment is even greater, at nearly 20%.

Within the group of Trafford's residents classified as non-white, further disparities exist, with those from Indian, Black or Black British backgrounds nearly 20% more likely to be in employment than those from Pakistani or Bangladeshi backgrounds.

Source: Annual Population Survey, ONS Crown copyright reserved, Nomis November 2008

Trafford Residents: Annual Pay Gross 2007, Median values



Annual pay is higher on average for Trafford's workforce than anywhere in Greater Manchester (apart from Manchester) at £20,700, which is above the national average of £20,300.

Trafford's residents are the best paid in the conurbation at £22,200 per annum suggesting that Trafford's residents take up a high proportion of the highest paid jobs in the conurbation, found in Trafford and Manchester. The North West's average annual pay is in the region of £19,100, by contrast.

Source: Annual Survey of Hours & Earnings, ONS Crown copyright reserved, Nomis November 2008

In Conclusion

Whilst educational attainment amongst young people is good there are a small percentage of young people who are not engaged in employment or training. Reducing this figure is a local priority for Trafford to ensure positive outcomes for all of our young people, where ever they live in the Borough.

Whilst the attainment of Trafford's young people is important at an individual level, it is of equal importance to the functioning of a successful economy. Likewise, in respect of post 16 academic and vocational achievement levels.

In Trafford post 16 provision is delivered through 1 FE college and 8 schools. Seven are grammar schools with 6th forms and Trafford College is the provider of much of the on going sector-specific training required by employers.

Despite this, just over 12% of Trafford's businesses are reporting skills gaps. Whilst this is among the lowest proportions in Greater Manchester and well below the national average of over 15% it is still of concern, as reducing this percentage is fundamental to our economic survival and future prosperity.

Another facet of reported skills gaps is that the larger the company, the more likely they are to report skills gaps; smaller businesses in Trafford, those employing less than 5 staff, show far lower skills gaps than any other area in the country – over 97% of these businesses report no skills gaps, better than the national average of 92%.

Given how critical having demand led and responsive skills provision is, it remains an overriding priority for the Learning and Skills Council through programmes such as Train to Gain and Skills for Life, to ensure that our employers are able to access the skills they need in order to allow their businesses to thrive and grow.

Looking to the future it will continue to be the role of the Trafford Economic Alliance and the wider Trafford Partnership to better co-ordinate the delivery of this agenda at a local level.

People : Key questions

Improving Skills:

LSC 'Train to Gain' has demonstrated that workforce development can be used as a solution to business problems and or as a driver for business growth and improving competitiveness.

- 1. Are we targeting employers in the right sectors with the right training?**
- 2. What do we need to do to drive up demand for training from employers and employees in the future?**

Economic Inclusion: Deprivation, Equalities & Barriers

Trafford is a Borough where, in some locations, extremes of wealth and poverty continue to exist side by side. This brings with it mixed employment prospects and access to services.

Although predominantly wealthy and prosperous, Trafford has a number of pockets of acute deprivation at neighbourhood level which, because of the surrounding prosperity, go unrecognised in terms of being able to attract external funding in order to address these issues.

However, in 2004 and 2007, a national comparison of deprivation was commissioned to look at levels of deprivation in smaller neighbourhoods within wards; namely Super Output Areas (SOAs). These are a geography designed for the collection and publication of small area statistics about the population living there.

In the case of Trafford many of these most deprived SOAs lie within the borough's already recognised deprived areas. Namely, Old Trafford to the North, Partington, in the west and Sale West in the centre of the Borough.

In 2004, 16% of Trafford's SOAs were among the 20% most deprived areas of the country. However, by 2007, only 11% came into this category, mainly due to increased levels of income and employment amongst residents living in these areas.

A key factor influencing prosperity and productivity is the economic activity rate. Therefore, where concentrations of economic activity are low and levels of worklessness are high there is a negative impact of the overall performance of economy.

Trafford's largest concentrations of workless residents mirror the areas where overall levels of deprivation are the most acute. Collectively, there are over 3,000 people claiming working age benefits in Old Trafford, Partington and Sale West.

The smallest proportion of these residents claiming Job Seeker's allowance, a benefit paid to those actively seeking work. However the largest percentage are those claiming incapacity benefit or severe disablement allowance and includes those who are 50+, lone parents, disabled people and ex-offenders.

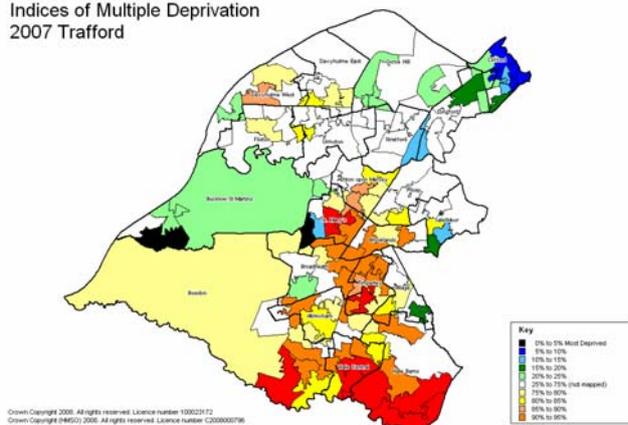
In many cases there are multiple barriers which are preventing these workless residents from accessing the labour market but in terms of the availability of employment in Trafford the picture is more favourable than elsewhere in the conurbation or indeed nationally.

Job Seekers Allowance claimants per vacancy shows the relative number of people in an area who are competing for the same job. In Trafford, the average annual rate is 0.9 at March 2008; in the North West and in England, the rate is over 2. This means that there are more jobs available than there are job seekers in Trafford. It is important to note that recent figures illustrate a downturn in job prospects in Trafford. This ratio in Feb 2009 equates to 3 JSA claimants per job.

Combining those who are actively looking for work (JSA = 2,200), those who are on incapacity benefits but potentially available for work (IB target = 4,300) and those who are economically inactive but would like to work (8,000), Trafford's population alone is capable of providing an extra 14,500 workers.

Deprivation in different areas

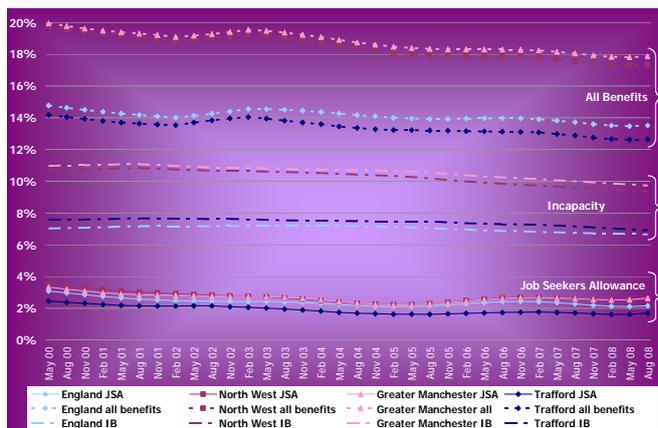
Indices of Multiple Deprivation
2007 Trafford



The areas coloured black, blue or green are relatively deprived; the areas coloured yellow, orange or red are relatively affluent. We can clearly see the recognised areas of deprivation in the north and west of the borough, but now we can also see the isolated pockets towards the east and the south (adjoining the Wythenshawe estate in Manchester).

Key Benefit Claimants & Worklessness

Percentage of the working age population claiming key benefits, four quarter averages, 2000-2007



Nationally, Job Seekers Allowance (JSA) claimants make up approximately 2% and residents claiming Incapacity benefits (IB) make up approximately 7% of the working age population

The percentage of JSA claimants is lower in Trafford. However, the proportion of IB claimants, while significantly lower than Greater Manchester and the North West, is slightly higher than the national average.

In Trafford, 16,600 people claim some type of benefit:

- 2,200 are claiming JSA (1.7% of the working age population)
- 9,100 are claiming IB (6.9% of the working age population).

Source: DWP benefit claimants, via Nomis, 15.8.08

In Conclusion:

It is well documented that people living in deprived areas are more likely to experience difficulty entering and staying in the labour market, than those who do not. They are also likely to find it difficult to access local services, which is associated with living in poorer quality environments.

In line with National Government policy the Trafford Partnership through the Trafford Economic Alliance is committed to building strong, healthy and prosperous communities, where everyone has the opportunity to make the most of their skills and potential.

At a National level the commitment to delivering on this agenda means that significant progress has been made with the introduction of a series of reforms to remove the barriers holding people back, to help them into work and to give them responsibility and the support they need.

This commitment has been reflected by Greater Manchester being selected as one of the national City Strategy Pathfinder areas. This has allowed key strategic partners to come together at a GM level to:

- Use funding committed by partners to fill gaps in existing provision and provide more help to those who are currently furthest from the support of the welfare state;
- Join up local activity more effectively, so there is more clarity and less duplication, with clearer routes for individuals to take up the support they need to get back to work;
- Ensure the provision on offer is tuned to the needs of the local labour market, so individuals gain the skills and attributes they need to access the particular jobs that employers need to fill.

At a local level these priorities are articulated in the Trafford Sustainable Community Strategy and there is a commitment that in Trafford fewer of our neighbourhoods will be in the worst 20% most deprived in the country and none will be in the worst 5% by 2020.

This has been achieved in part by distilling the GM City Strategy approach down to a local level.

This has begun through the work of the Trafford Economic Alliance. In the absence of Working Neighbourhoods Funding we are looking at how we can best concentrate interventions and other limited amounts of funding on under-represented groups and in under performing neighbourhoods.

We recognise that if we are to tackle issues of deprivation at this level we must better coordinate organisations to aligning their resources and policies in order to increase participation and under representation in mainstream services and provision.

People : Key questions

Reducing Worklessness:

Worklessness in Trafford is concentrated in 3 main areas where this equates to 1 in 3 of the working age population.

- 1. What is the best approach to addressing worklessness in Trafford's deprived neighbourhoods?**
- 2. What would have the most impact in improving access to provision in order to encourage economic activity?**

Trafford: Business

Economy: Drivers of Productivity, Industrial Structure and Economic Forecasts

Trafford has a balanced and diverse economy with a good track record of attracting and sustaining businesses in key growth sectors.

Because Trafford is an investment beacon it makes a significant contribution to the Greater Manchester and wider regional economy. The Borough provides 12% of the total number of businesses in Greater Manchester and 11% of employee jobs.

Some 10,900 businesses call Trafford home. 70% of these businesses have fewer than 5 employees with only 1% employing more than 200, meaning that 11% of employees in Trafford work in the smallest companies and 30% work in the largest.

Within the growing number of businesses, over the last 25-30 years, the employment base of the Borough has changed substantially as the old traditional industries, which were well represented, have declined and in many cases closed.

Fortunately, partly because of the skills of its residents, partly because of its geographical location and also because of its high quality environment and communications network, Trafford has been able to attract businesses in newer types of industries to replace the traditional jobs that have been lost. High technology, warehousing and distribution, office and other service businesses have been amongst the activities that have moved into the Borough.

Manufacturing in Trafford has consolidated and the number of businesses in this sector has remained relatively stable over the last 5 years. However, the number of employees in this sector has declined, from 17,800 in 1998 to 12,700 in 2006, a decline of around 28%. This is a slightly slower decline than the national and regional average of around 29% and better than Greater Manchester's 32% decline over the same period. Therefore, Manufacturing in Trafford now represents 10.3% of the workforce, down 5.4% since 1998. Notable employee losses are in the manufacturing of food and beverages, chemicals and machinery and equipment. If the pound remains weak in the long-term then opportunities for manufacturing export will become more feasible from the UK thus potentially reinvigorating this sector.

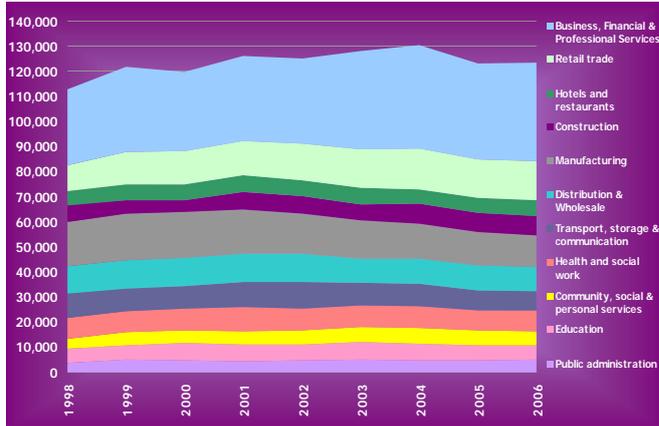
Meanwhile, the Business, Financial and Professional services sector in Trafford has continued to grow and now accounts for 32% of employees and 43% of businesses. This represents a growth of 30.5% and a change in the employment share of over 5% from 27% to 32%. This sector makes up a far greater proportion of Trafford's employment than in other areas: it is only around 20% of the workforce nationally, regionally and sub-regionally. Particularly notable growth areas within the sector are computer activities, business services and financial auxiliary services. In fact, 15% of Greater Manchester's and 7% of the North West's employees in this sector work in Trafford, making this one of the most vital contributors to Trafford's overall success.

Retail has also maintained a dominant position, not just at the Trafford Centre but in our four town centres and in local centres across the Borough. Over 15,500 employees now work in retail in Trafford this makes up 12.6% of Trafford's total, above the national, regional and sub-regional level, where the retail sector accounts for around 10.5% of the workforce.

Other growth sectors include Construction, with an increase of 1,000 employees (period from 1998 to 2006) meaning this sector now accounts for over 6% of the workforce; hotels and restaurants, showing an increase of just under 1,000 employees taking this sector to over 5% of the workforce; public administration, increasing by 1,100 employees to make up 4% of the workforce; and recreational, cultural and sporting activities increasing by 1,100 to nearly 3% of the workforce.

This change in the make up of Trafford' s business base has resulted in an overall growth in employee jobs. However, Trafford has also seen sustained levels of self-employment, which adds a further 13,500 jobs to the economy. Self-employment is concentrated in the Business, Financial and Professional Services sector as well as Construction. In 2006, total employee jobs in the Borough numbered 124,000, part of an upward trend that has continued since the mid-1990s and is demonstrated in the high demand for both office and industrial space in Trafford.

Employees in Trafford by Industrial Sector

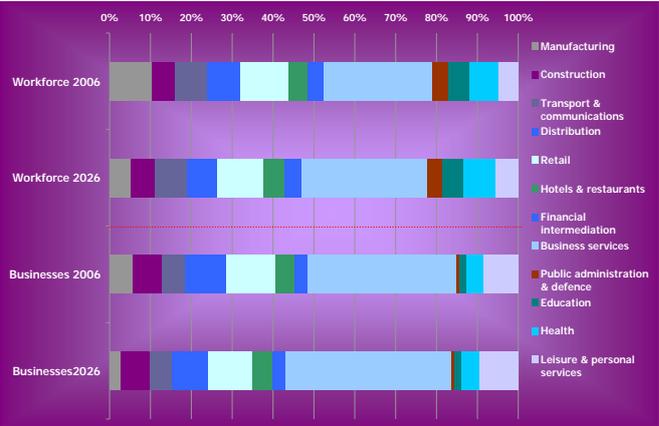


Between 1998 and 2006, employee numbers in Trafford grew by 8.8% from 113,800 to 123,800. This compares favourably to trends throughout the country and region: it outstrips growth in Greater Manchester at 8.1%, the North West at 8.0% and average growth rates in England of 7.6% for the same period. This growth is supported by the strategic location of the borough, its good environment, excellent communications and the skills of its residents.

Growth varies by sector showing different patterns of demand and trends in employment. Certain sectors are particularly strong in Trafford, while others have shown decline.

source: ONS ABI 2006, local analysis, June 2008

Sectoral Share Change in Trafford's Workforce and Businesses



The total number of employees based in Trafford is projected to increase by 14%, and the number of businesses by 19% over the next 20 years. More people working from home or network sites rather than from one specific office could also impact employment land.

The biggest changes in employment will come in manufacturing, which will continue to employ fewer people, and in business, financial and professional services, construction, hotels, restaurants, leisure and personal services which will all see higher than 20% increases in the number of employees.

source: ONS ABI 2006, local analysis, June 2008

Centre for Enterprise

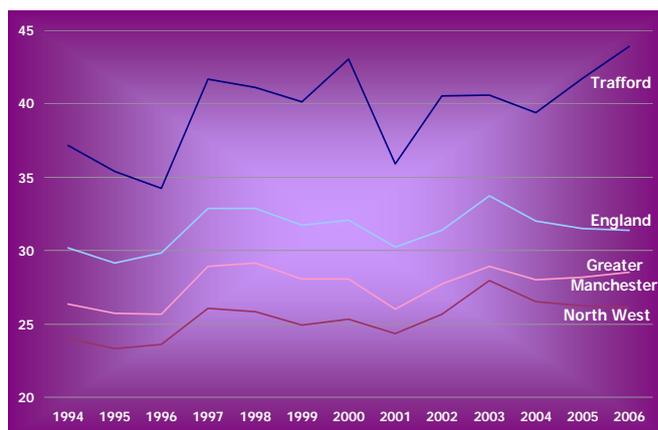
Trafford's Stock of Businesses Registered for VAT



The number of VAT-registered firms in Trafford increased by 20% between 1997 and 2006, higher than the national average of 18% and much higher than the North West (15%) and Greater Manchester (13%). This reflects both high rates of firms registering for VAT and high survival rates of these firms. Nearly 13% of all new registrations in Greater Manchester in 2006 were in Trafford, representing over 5% of those in the North West; 2006 showed record rates of VAT registration in the borough at 930 new firms.

Source: VAT registrations/deregistrations, ONS, crown copyright from Nomis 19.11.07

VAT Registrations per 10,000 Population



It is particularly in comparison to the population that these rates can be highlighted: the chart below shows the rate of VAT registrations per 10,000 population. Trafford's levels of registration are particularly high in comparison to the national average as well as to the regional and sub-regional rates, suggesting high levels of creativity and confidence within Trafford's population and a positive perception of the success of starting a business in Trafford. Survival rates of VAT registered businesses in Trafford at the 1 year mark are in line with national and regional averages at 92%, and are slightly better at the 3 year mark at 72%.

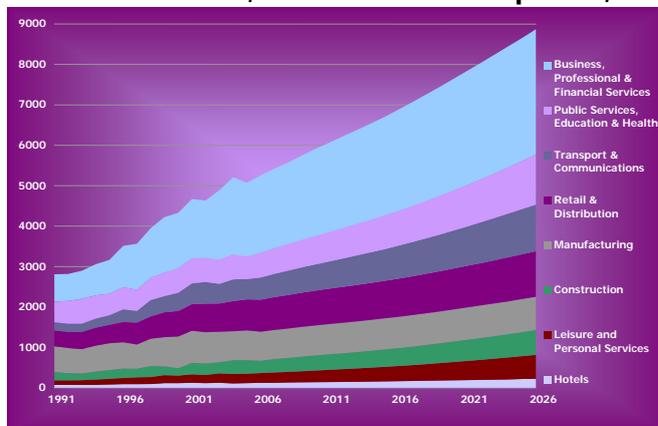
Source: VAT registrations/deregistrations, ONS, crown copyright from Nomis 19.11.07

Productivity: Gross Value Added

The measure of productivity most commonly used today is Gross Value Added (GVA). This is similar to Gross Domestic Product (GDP) in that it considers outputs, namely the value of sales. However, it also considers the cost of production, including staff costs. Consequently, it measures the contribution to the economy of each individual producer, industry or sector.

An additional measure worth considering alongside the total GVA is the relative value added by each employee. GVA per employee for each sector relative to the average for Trafford is not projected to change very much over the next 20 years. However, a small increase in the number of employees in the *high* GVA per sector industries (manufacturing, transport and communications) would have a much larger impact on Trafford's total GVA than the same increase in the *low* GVA per sector industries (the public sector, distribution and retail, hotels and restaurants).

GVA for Trafford, £million at 2003 prices, historical and projection.

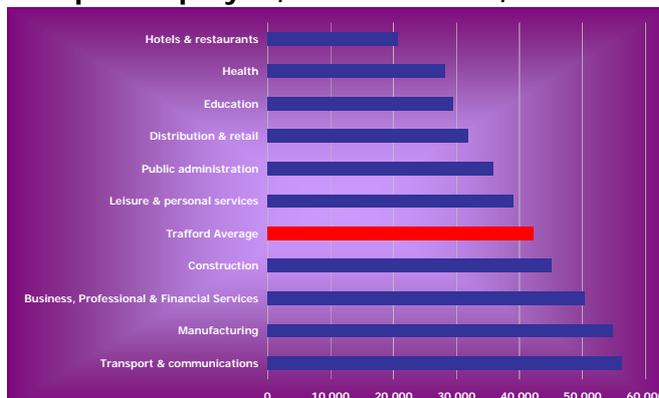


Historically, the manufacturing sector produced the greatest amount of GVA, but since the UK has moved from being a manufacturing powerhouse to a service economy, it is unsurprising to see that the greatest amount of GVA is produced by the financial, business and professional services sector.

Other sectors continue to provide an important and increasing contribution to Trafford's overall GVA, notably the public sector, transport and communications. The importance of the leisure market becomes more obvious as its share of Trafford's GVA grows by more than a third by 2026.

Source: Greater Manchester Forecasting Model, 2007 version (baseline)

GVA per Employee, Trafford 2006, £



What can be seen clearly from the chart is that many of the reasons that people might choose to live in an area (excellent schools, healthcare, town centres, the evening economy) cannot be proved to be important simply from their contribution to the economy. Certainly, in Trafford, with its focus on being a great place to 'Live, Learn, Work and Relax', focussing solely on the sectors capable of the biggest GVA increase would fail to satisfy three out of four aims.

Source: Greater Manchester Forecasting Model, 2007 version (baseline)

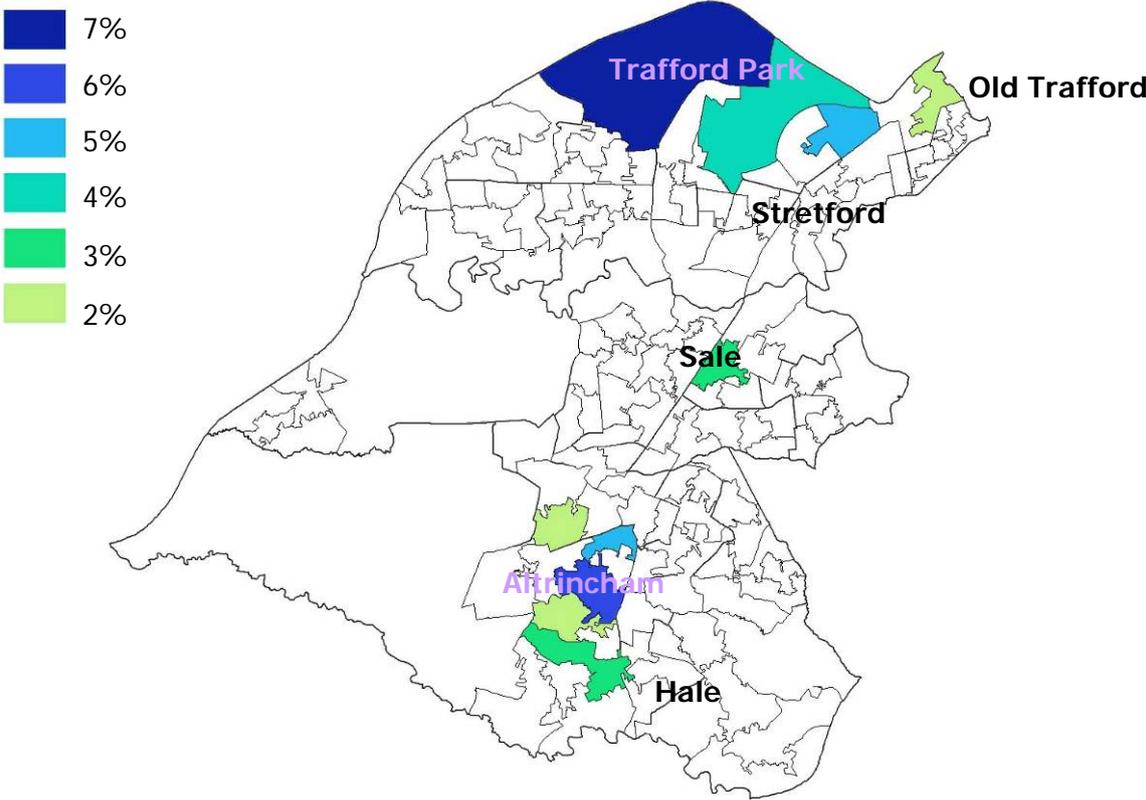
Locations and Sizebands of Business in Trafford

A significant proportion of the land in Trafford is residential. However, Trafford provides 11.8% of Greater Manchester’s businesses and these are concentrated in certain areas as much as 38% of all the businesses in Trafford can to be found in only 10 Super Output Areas.

These 10 areas tend to be geographically small in comparison to the number of businesses located within them, as they tend to be located around town centres, except for Trafford Park and they account for half of the employee jobs in Trafford (over 61,000).

What is clear from this breakdown, particularly where there is a high concentration of businesses within a Super Output Area (SOA), is that many of Trafford’s businesses are small enterprises as can be seen in the breakdown of businesses by employee size, below.

Top 10 Business Locations (SOAs) in Trafford by number of businesses, showing % Share of Trafford’s Businesses



Source: Annual Business Inquiry rounded for confidentiality, Crown Copyright, Nomis Apr 08

Sizebands of Trafford's Businesses

	Total	1-4	5-10	11-24	25-49	50-99	100-199	200+
Businesses	10,900	7,600	1,400	900	500	300	100	100
As % of Total		70%	13%	8%	4%	2%	1%	1%

The average number of employees per business in Trafford remained at over 12 between 1998 and 2005, only dropping to just over 11 per unit in 2006. This seems to be the start of a trend towards ever smaller enterprises.

Top 10 Business locations (SOAs) with % breakdown by number of employees

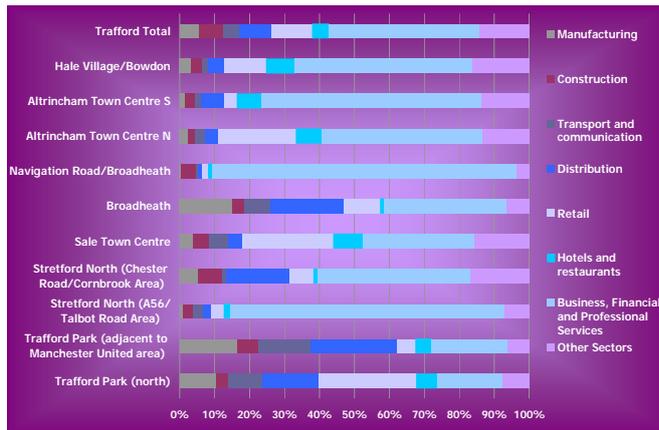
Location	Businesses	1-10	11-49	50+
Trafford Park including Trafford Centre	800	59%	27%	15%
Altrincham Town Centre	700	83%	13%	4%
Stretford North: A56/Talbot Road Area	500	85%	9%	6%
Navigation Road/Broadheath	500	98%	2%	0%
Trafford Park: Wharfside, Westinghouse Rd, Village	400	64%	26%	10%
Hale Village/Bowdon	300	87%	12%	2%
Sale Town Centre	300	80%	15%	6%
Altrincham/Bowdon	200	89%	9%	2%
Broadheath	200	74%	17%	10%
Stretford North: Chester Road/Cornbrook Area	200	81%	15%	3%
Trafford	10,900	83%	12%	4%

Within the top 10 areas, the business size characteristics are different, with the areas round town centres showing a much higher concentration of smaller businesses than the business/industrial parks.

The sectors that are represented in these different areas differ greatly, with reasonably predictable clusters of manufacturing in Trafford Park and office-based work round the town centres.

Source: Annual Business Inquiry rounded for confidentiality, Crown Copyright, Nomis 16.4.08

Top 10 Business Locations (SOAs) with % breakdown by key industry sectors



The sectors that are represented in these different areas differ greatly, with reasonably predictable clusters of manufacturing in Trafford Park and office-based work round the town centres.

Within sectors, businesses show markedly different employment models, with both manufacturing and retail having a reasonable spread of workforce sizes, but other sectors, notably office-based Business, Financial and Professional Services (BFPS), tending to have much smaller sized workforces.

The average number of employees per data unit also differs hugely across sectors, from 8 in Business, Financial and Professional Services to 22 in Manufacturing.

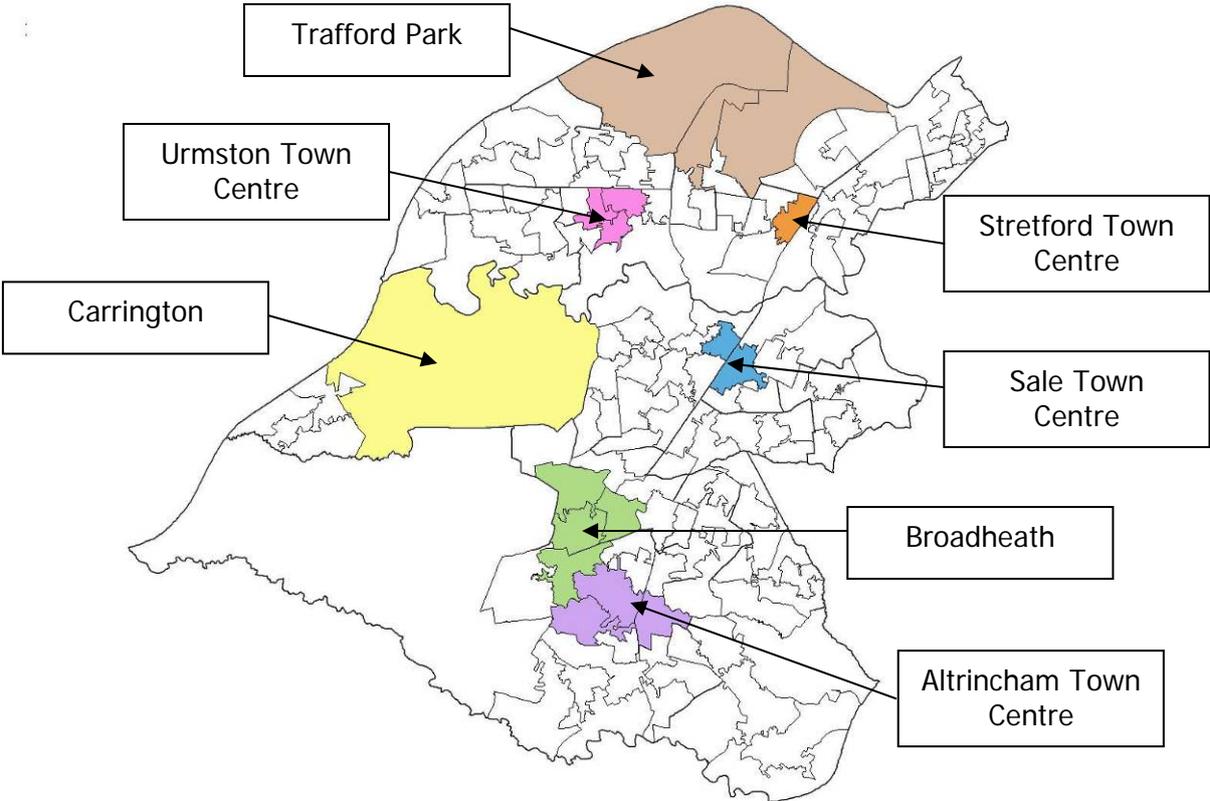
Source: Annual Business Inquiry rounded for confidentiality, Crown Copyright, Nomis Apr.08

Key industry sectors by sizeband

	Trafford overall	Manufacturing	Construction	Wholesale and Distribution	Retail	Hotels and restaurants	Transport, storage and communication	Business, Financial & Professional Services
Average employees per business	11	22	10	12	10	13	16	8

Source: Annual Business Inquiry rounded for confidentiality, Crown Copyright, Nomis 30.4.08

Key Strategic Centres of Business in Trafford



The 7 areas identified above make up a third of Trafford’s businesses and half of Trafford’s employees, despite the relatively small amount of land they cover.

In order to respond to the current Regional Spatial Strategy’s employment land requirements for Greater Manchester and likewise to deliver the full economic potential and performance of the Manchester City Region, 2 of these sites in particular, namely Trafford Park and Carrington have been identified as strategic locations of regional significance. It is recognised that both locations have the capacity to continue to attract investment and development in order to deliver regional spatial and economic development priorities.

Trafford Park

Trafford Park is the world’s first purpose built industrial Park and remains Europe’s largest, covering 3,000 acres. It is home to 1,300 companies employing 32,000 people and contributes 26% of the employee jobs in Trafford. 12% of all of Trafford’s businesses are located in Trafford Park.

Whilst industrial warehouses dominate the core of the Park and manufacturing still accounts for 58% employees working there, more recently Trafford Park has seen the introduction of a range of new uses.

Areas of the park are now also home to a range of tourism, leisure, retail and commercial uses and developments such as the Trafford Centre, The Quays, and the imminent Mediacity:UK have all impacted on the area’s dynamics. This means that the Park now hosts

45% of Trafford's retail and 18% of leisure jobs and 10% of Financial and Professional Services jobs.

Trafford Park is arguably Greater Manchester's most strategic location and has the capacity to go on attracting strong investment and development interest that will effect its transformation and enable it to provide Greater Manchester with a state of the art sustainable mixed use environment for high growth sectors in:

- technological
- digital new media
- knowledge

Despite the current economic conditions, Greater Manchester Forecasting Model suggests that Trafford Park, along with the wider district will continue to grow in employment over the next twenty years. The model predicts an increase of circa 16%, one of the highest in the sub region. This assumes that the Park has the modern business premises and infrastructure need to attract new investment.

Carrington

It is well recognised that in order to more sustainably deliver the full economic potential and performance of the Manchester City Region there is a requirement to better utilise under developed brownfield land. Trafford's largest underdeveloped brownfield site is Carrington which has the imminent potential to be developed as strategic employment site for the City Region and the Northwest, boosting GVA levels across the conurbation and responding to substantial local and sub regional employment growth requirements.

Carrington also has the potential to respond to the critical power/energy infrastructure requirements of GM and indeed the region

Carrington shares some of the same physical characteristics as Trafford Park, it borders the Manchester Ship Canal and covers a large area. However, unlike the Park it has a relatively small business population.

Carrington's businesses tend to be medium sized, with an average of 13 employees each, slightly higher than the Trafford average of 11. 2,000 employees are located in Carrington, and even though this is only 2% of Trafford's total jobs. Businesses in Carrington are split between the Business, Financial and Professional Services sector and industrial uses; IT accounts for 31% of Carrington's BFPS sector.

Significant improvements to the transport connections both by road and potentially along the Ship Canal Corridor are required in order to release the full potential of Carrington and there are some land remediation issues to address. However, these issues are not considered to be major constraints by potential investors/developers. So much so, that recently Carrington's industrial heritage has begun to reassert itself with the arrival of a number of commitments to investment from prominent international companies.

Broadheath

Broadheath is the area to the north of Altrincham Town Centre. It is unique among these key centres in having a large residential population alongside a high share of Trafford's businesses. In common with Carrington and Trafford Park, Broadheath is in the process of re-invention: where there used to be industrial units dominating the Atlantic Street area, offices are taking over from the east and south and housing is pushing in from the north.

As well as several business parks, Broadheath is home to Altrincham Retail Park, a successful out of town retail development, home to leading retailers.

Broadheath's businesses tend to be medium sized, with an average of 14 employees each, higher than the Trafford average of 11. 4% of Trafford's businesses and 6,000 of its employees are located in Broadheath. Businesses in Altrincham are split between the Business, Financial and Professional Services sector, manufacturing and distribution; 12% of its employees are in retail, and perhaps surprisingly, IT accounts for half of all BFPS jobs.

Town Centres

Trafford has four town centres, Altrincham which is the largest along with Sale, Stretford and Urmston. The town centres provide the focus for local shopping and community facilities, with a variety of convenience, comparison and service businesses on offer as well as Library and Council services and play a vital role in the economic, environmental and social wellbeing of the Borough.

Town Centres also provide a hub for community activity, including events and projects to promote the town centres in conjunction with the Town Centre Partnerships. In addition, they offer opportunities to access sports and leisure facilities that help contribute to the quality of life and wellbeing for people of all ages.

Trafford's town centres are recognised as key to the economic prosperity of the Borough and as such their continued development as commercial, retail and leisure hubs providing a range of employment opportunities and attractive locations for businesses is an important focus. Priorities and issues for the town centres focus on the areas of skills and experience, business support and development, investment, locations and infrastructure. The priorities for our Town Centres are identified in a later section of this assessment.

In Conclusion

Whilst Trafford's business base has continued to grow over the last ten years, the change in its make up has meant the consolidation or even decline of certain sectors and growth of others.

The number of employees per business has remained relatively constant and although there are slightly fewer employees per business than there were ten years ago, the number of businesses located in Trafford has increased by 18% and the number of employees by 9%.

The total change in the number of employees based in Trafford over the next 20 years is projected to increase by over 17,000, an increase of 14%, and the number of businesses is projected to increase by 1,900, an increase of 19%.

This will of course have an impact on Trafford's employment land and on the type of accommodation required.

Following the same pattern as the last 10 years, the biggest changes in employment will come in manufacturing, which will continue to employ fewer people, whilst business, financial and professional services, construction, hotels, restaurants, leisure and personal services will all see higher than 20% increases in the number of employees.

Managing this change through both policy and physical interventions will determine how well our business support offer is able to respond, likewise how well we are able to go on attracting and then retaining appropriate investment by ensuring that we have the right premises and locations to enable the Borough to remain competitive.

Business : Key questions

Business Support and Enterprise :

Trafford has the highest proportion of companies per head of population in the city region.

1. How well does the current business support offer respond to the needs of our high levels of enterprise?

Attracting and then retaining appropriate investment in Trafford is key to driving economic growth.

2. How, through planning policy, do we ensure that we have the right premises and locations to enable the Borough to remain competitive?

3. What kind of relationship does Trafford want to have with the Conurbation's Higher Educational Institutions and concentrations of Research & Development?

Trafford: Place

Trafford 'the place' is fundamental not only in the borough's economic success but in that of the wider Manchester City Region. The following section reviews Trafford's infrastructure including its strategic location, its employment land, transport infrastructure, housing stock and access to services and green space in order to demonstrate how critical they are to the Borough's economic performance

Infrastructure

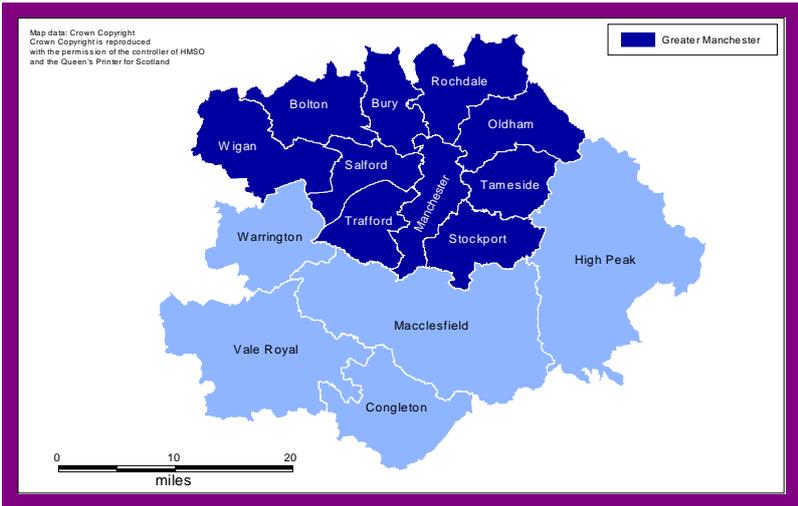
Trafford enjoys an enviable geographical location within the Manchester City Region, sharing its boundaries with Manchester the regional centre and Salford in the north and the affluent areas of Warrington and Macclesfield in the South.

It is well connected with excellent access to main arterial routes including the A56 which runs the length of the Borough, the M60, M56 and M6 motorways and Manchester Airport. It has an efficient and integrated transport system with metrolink running services the length of the Borough every 6 minutes

Trafford's four town centres (Altrincham, Sale, Stretford and Urmston) make up the heart of the Borough, adding individual character and providing vibrant places for people to enjoy living, working, shopping and leisure.

Add to this an outstanding collection of internationally renowned sporting, cultural and leisure attractions and a strong and diverse economy offering a wide range of employment and business opportunities and it is apparent why Trafford's high quality environment make it one of the most sought after locations in the north of England in which to live, work and do business.

Trafford's Location within the Manchester City Region



Trafford is 41 square miles, and home to 212,200 people living in 92,200 dwellings who make up 9% of GM population.

Employment Land

A full review of Trafford’s employment land is currently underway, which will form part of the supporting documents to the new planning framework the Local Development Framework. The review will provide an understanding of both the supply and the demand sides of employment land use.

Much of the analysis forming the demand side of the equation is based on our own calculations from the Greater Manchester Forecasting Model (GMFM), considering the size of businesses in relation to the number of employees they typically have and the amount of space currently required per employee.

A simple change model, which uses current m² per employee ratios, suggests that manufacturing land will be less in demand, but that the dominance of the Business, Financial and Professional Services sector will continue to put pressure on the supply of suitable premises. Taking current employee per business ratios, we can get a figure for the likely number of premises that we will need in each sector. The total growth in the number of businesses is 19%, reflecting the view that the average size of businesses will continue to decrease. Additionally, English Land Partnership (ELP) methodology allows the same amount of ‘employment land’ for retail, leisure and personal services uses as it does for business, financial and professional uses, since it only gives varied land requirements for manufacturing, transport and storage and office uses. Considering, for example, the number of employees in retail, catering and leisure in the Trafford Centre compared to the size of the centre itself, we discover a space requirement which is 12% larger than the ‘other uses’ allowance given by the ELP.

The other major pressure on employment land is the amount of land that will be needed for housing. The Regional Spatial Strategy will provide an integrated allocation of land use, worked up in consultation with the Local Authorities. The current allocation is not finalised and is considered too simplistic a model, but Trafford’s land use will be considered alongside all other Greater Manchester authorities to provide a solution which allows the appropriate amount of economic growth, but allows the people needed to drive this growth to live within commutable distance.

Land Requirement: Total Change 2006 – 2026, hectares



Using this simple model, a total of 29 hectares of additional employment land is needed over the next 20 years, an average of just under 1.5 hectares per year. Using the same methodology to estimate the current land use, this gives us a 20 year change of 10%.

Source: Greater Manchester Forecasting Model, 2007 version (baseline) and English Land Partnership (ELP) floor space per employee estimates

Transport

Trafford has an extensive primary route network including the A 56 which runs the length of the Borough and excellent connections to the motorway network made up of the M60, M56, M6 and M62, along with a higher than average levels of car ownership.

Public transport links include heavy rail, metrolink, and bus, whilst a heavy goods railway line serves Trafford Park.

The Borough currently licences around 474 private hire vehicles and 138 hackney carriage taxis whilst Community Transport (Partington and Cadishead Community Transport), Shopmobility, Demand Responsive Transport such as Ring & Ride and Local Link, and Taxi voucher schemes also form part of the transport choices available to local people, especially those with limited access to the main modes of public transport.

Trafford's infrastructure has to deal with considerable traffic movements on a daily basis, particularly in the morning and evening peaks. These traffic movements are growing with development pressures both within and outside the Borough. One of these is the lack of adequate public transport links serving businesses within key areas. At present, there is no viable alternative to the car for the majority of the 32,000 employees within Trafford Park.

Over the last 15 years, Trafford has benefited from a number of large transport investments, namely new highway infrastructure in Trafford Park, the introduction of Metrolink from Altrincham to Bury and improvements to the M60. Trafford is also investing in its town centres by improving access and raising the quality of public realm.

The Public Transport Network

The *Metrolink* network provides a north-south connection through the Borough to Manchester Regional Centre and has recently benefited from track renewals and upgrades costing over £130m. Despite its apparent popularity, Metrolink comprises just 5 per cent of all work trips in Trafford. The potential for patronage growth on the line is currently restricted in the morning Peak owing to a high level of overcrowding.

Funding is now committed for the provision of an additional 8 trams on the Altrincham to Bury Metrolink line, which will result in capacity increasing on the line by 50% and enable more double trams to be operated during peak periods. The new trams are expected to be operational by 2009 and will be fundamental to addressing existing capacity issues on the line. It is recognised that further vehicle capacity, over and above the 8 trams on order, will be required to support growing demand.

There are 9 rail stations within the Borough providing services to Manchester Regional Centre on the Mid-Cheshire line and the Manchester to Liverpool line, in addition to the Manchester United Rail Halt which only operates on match days.

The busiest rail station is Urmston Rail Station, which carries 39% of all rail passengers from Trafford. Between 1997/1998 and 2004/2005 there was an overall increase of 50% in the number of passengers using rail at monitored stations in the inbound direction. However, the absolute numbers choosing to travel by rail in the morning peak period is low (382) when compared to the total using light rail (3,489) which highlights that the utilisation of the asset

could be improved, since heavy rail is competitive with car travel for providing connections to the major rail hubs in Greater Manchester and for those wishing to make longer journeys.

Buses are the most well used form of public transport within Trafford and Greater Manchester. Trafford accounted for 7% of all bus mileage in Greater Manchester in 2006. GMPTA is responsible for the maintenance and renewal of bus stop infrastructure in Trafford in addition to the maintenance, renewal and improvement of bus stations and interchanges, the most notable of which within Trafford is Altrincham interchange.

Accessibility issues have been identified linking into Trafford Park, Carrington and Partington. Better public transport by bus has the potential to address these issues and encourage modal shift.

Roads and Cars

The A56 is the main arterial route in the Borough to Manchester Regional Centre and the motorway network. The private car plays a significant role in the movement of people across the Borough. Cars account for 85% of the traffic on Trafford's major primary and secondary route network, higher than Greater Manchester's average of 81%. In addition, over two-thirds of Trafford residents choose to travel to work using a private vehicle or as a passenger in a private vehicle.

Car ownership in Trafford continues to increase and overall, is one of the highest rates in Greater Manchester. Despite this there are geographical disparities within the Borough. People living in Hale and Bowdon have access to 0.8 cars per adult whereas those in Clifford have access to only 0.4. However, Clifford is relatively well served for public transport, unlike Bucklow St-Martin's where the car access level is only 0.5 coupled with limited access to public transport.

Transport Issues and Challenges

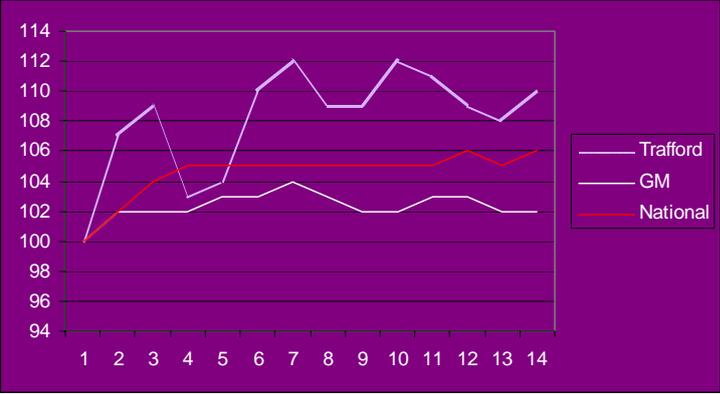
There are a number of challenges facing Trafford over next 10-15 years. Trafford will use its limited LTP Capital monies to target some priorities, but other mechanisms including partnerships with neighbouring local authorities and developers will be essential to providing long term improvements to the communities we serve.

Through the maintenance of our extensive highway network, and our £24m Highways Maintenance Initiative, a 'wall to wall' approach is being adopted. For major highway work we seek to transform the entire streetscape and ensure all highway need likely over the next 3-5 years is targeted all at once. This minimises disruption but also achieves more impact in the community.

The key issues and challenges are:

- Tackling congestion on main roads and key junctions;
- Improving road safety with a specific focus on people killed & seriously injured;
- Increasing capacity and enhancing Metrolink;
- Improving bus services and increasing bus patronage;
- Improving accessibility;
- Increasing walking and cycling;
- Addressing air quality and the environment.

Traffic growth between 1993 and 2006 in Trafford, Greater Manchester and Nationally. Index year: 1993 = 100



The graph shows average weekday traffic flows between 1993 and 2006 in Trafford, Greater Manchester and England. Over this period, traffic flows in Trafford increased by 10% compared with 2% across Greater Manchester and 6% nationally.

Housing

Trafford's housing offer, namely the choice and quality of housing available, is important to maintaining the success of its economy. Ensuring that businesses continue to attract employees with the right skills to meet the needs of the economy is vital to their ongoing competitiveness, with the housing offer and supply being an important element of delivering a pool of local labour.

There is also the need to make linkages between the provision of housing when looking at reducing worklessness, again, in order to use this pool of potential labour to meet the growth ambitions of the Trafford economy.

This will require careful consideration on the links between jobs and housing, both spatially in terms of physical connections and appropriate types and tenures of housing but also in terms of the development and improvement of skills and knowledge to ensure that the workforce, including those in most need, are suitably positioned to respond to new employment opportunities.

Using **The Trafford Housing Strategy**, the following section presents Trafford's current position in relation to the three main housing contributors to economic growth.

Delivering the right Quantity of Housing

National policy and the emerging Regional Housing Strategy are designed to respond to a historic housing supply that has failed to keep pace with household demand. Trafford's Housing Strategy supports delivery of national policy and the Regional Housing Strategy at a local level.

Trafford has achieved considerable success in delivering new homes, as the following annual rates of net delivery show. When considering this, it is important to note that the year on year reduction reflects the fact that an effective housing restraint policy was in place.

Much of Trafford's housing is of high quality, ranging from typical suburbia and semi rural in some areas with urban flats and terraced housing providing other more affordable alternatives in others. Well-established areas include the south of Altrincham and Old Trafford, both with over 35% of housing stock built before 1920. Much of the development of housing in Trafford happened inter-war (27%) and in the post-war building phase (21%).

The timing of house building phases has shaped the accommodation landscape in Trafford with the mid-20th century boom creating semi-detached housing to meet the needs of an increasing affluent working population, enabled by improved transport and new technology be part of the growing business sector in the regional centre.

Number of new houses delivered (net)	
2004/05	746
2005/06	698
2006/07	509
2007/08	366

Source: Trafford Annual Monitoring Reports (various years)

Delivering a Housing Offer which reflects Local Needs – ‘Place-Shaping’

The forthcoming challenge will be to ensure that the process of growth is managed carefully to ensure that the provision of new housing is delivered in the most sustainable manner and assists in contributing to encouraging strong residential areas with active communities.

Through the development of planning policy, the LDF (Local Development Framework), Trafford has the opportunity to undertake a process of ‘place-shaping’ to ensure that these aspirations are met. Trafford has a strong track record in managing the delivery of housing through policy and, through its policy of restraint, has successfully encouraged increasing levels of development within the regeneration areas, whilst ensuring sustainable levels of development within the stronger southern areas of the authority. This principle will be retained through the new growth agenda with reference to RSS and continues to represent an important priority for the Council.

Encouraging sustainable travel patterns, the link between a person’s home and their place of work, is an important component of achieving the authority’s environmental policies and its overall vision of creating ‘improved health and quality of life for all’.

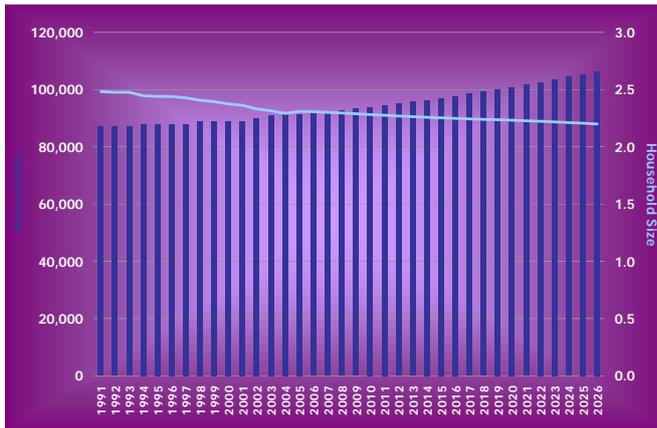
Where possible it is therefore important that the provision of new housing, and indeed investment in improvements to existing stock, is linked to the authority’s plans to encourage economic development and the establishment of an increasingly diverse economy. This, therefore, needs to reflect a continued emphasis on ensuring that houses of the right type are delivered in the correct places.

The Trafford Housing Market Assessment (HMA, 2006) shows a significant need for family housing. Whilst this focuses on three bedroom properties the assessment recommends that there is a predominant need for 2-bedroom dwellings across the Borough.

The recommendations within the Greater Manchester Strategic Housing Management Strategy recognise that alongside the emphasis on family housing, it is important that the town centres across the Borough continue to attract high quality residential uses. This is reflected in the current Sustainable Community Strategy, the EDP and the draft Housing Strategy (February 2009), which all commit to supporting our town centres to continue to develop as vibrant centres of activity, which will include the right mix of housing.

In other key areas of economic and housing growth, including the boundary of the Regional Centre at The Quays, it is important that joint-working continues across authorities to ensure that the overall balance of the housing offer reflects local demand and need.

The emerging evidence from the programme of research has started to provide increasing steer around the broad tenure and type mix required across the Borough and in its individual neighbourhoods. These recommendations will be fed through to planning policy and help to inform current and future masterplans of particular areas of regeneration focus and ensure that the provision of new housing both meets residents’ needs and assists in facilitating economic competitiveness.



GMFM projections suggest a relatively sharp rise in the number of households in Trafford, which is the product of both falling household sizes and an increasing population.

An extra 14,500 households will be needed to house Trafford's population by 2026. This represents growth of over 15%, compared to growth in population of only around 10% over the same period.

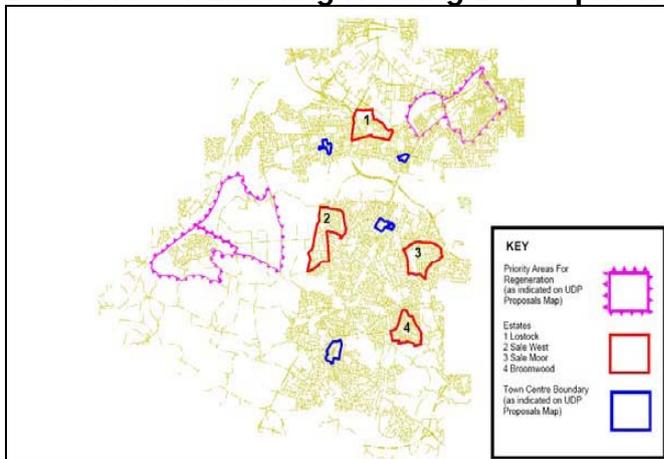
Source: Greater Manchester Forecasting Model, 2007 version (baseline)

Enabling Development

Nationally, levels of housing delivery have fallen considerably in 2007/08, linked to the problems within the wider economy and in particular the availability of finance to fund development. The need for new housing is clearly evidenced and it will be therefore increasingly important to assist, through a variety of means, the delivery of housing. At a national level this is leading to the Government examining a number of innovative delivery solutions recognising the current issues around the availability of finance and the impact of suppressed market conditions.

Trafford's is one of four Greater Manchester Authorities to form part of a Housing Growth Point and this presents an important opportunity for Trafford to take a more leading role in piloting new delivery approaches. Indeed Growth Point resources clearly represent an important facilitator in continuing to ensure housing development occurs, even within the current climate. Trafford is therefore committed to delivering an additional 116 more new homes per year, over an above our annual Regional Spatial Strategy Commitment of 578. In addition, close partnership working will be required between private and public bodies and agents to facilitate new development. New approaches regarding the use of public sector land and factoring in the ability of the Council to now deliver housing will need to be examined and explored in detail. The implementation and delivery framework within the Private Sector Housing Delivery Plan recognises these responsibilities and required actions as important components in successfully delivering against the objectives under this Strategic Priority.

Locations for Enabling Housing Development



In Conclusion

In the future, the Borough will face continuing and varied pressures on its land from development. These pressures will include the need to supply more houses accompanied by the right level of community facilities and services in order to accommodate further growth in the number of households required. Likewise from Trafford's changing business base of indigenous companies as well as new inward investors and new industries.

Alongside this there will be pressure to provide more open space and recreation facilities to meet the leisure needs of residents, and new road and other transport facilities to allow people and goods to move around quickly and efficiently.

Making sure that we properly balance these competing demands is vested in the way in which we interpret and apply national planning, housing and transport policy at a local level. Using local authority statutory planning powers is ultimately the mechanism through which this is controlled. However, it is important to recognise that this process must be informed and influenced by economic development, housing and transport priorities and is the responsibility of the Trafford Partnership's relevant thematic partnerships.

From an economic development point of view we need to ensure that, spatially, we are able to respond to the consequences of having a modern and evolving economy and, as a result, a changing business base accommodating key growth sectors.

From a housing perspective, we must have the right mixture of tenure and size, in the right locations, in order to respond to the growth of our economy. The challenge for Trafford now is to make sure our local housing policies, gear up to deliver the Borough's share of 3 million new homes, nationally by 2018.

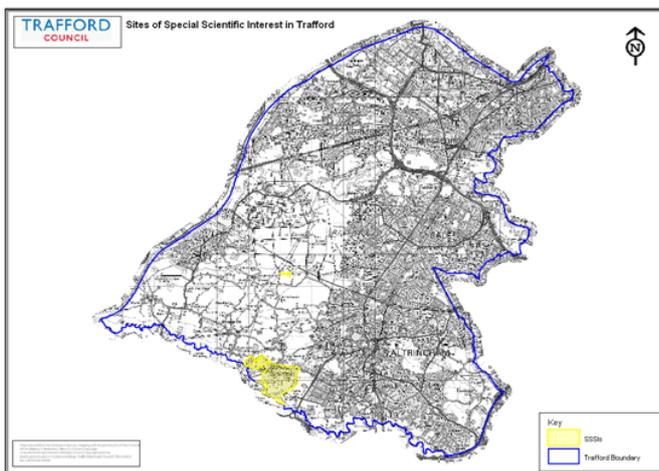
Where transport is concerned, the interventions we make must include: better use of existing infrastructure, increased use of new technology, travel plan and smarter choices initiatives, and highway and public transport investment. In addition, we must consider how funding streams might be assured.

Environment

The quality and appearance of Trafford's environment is generally high, but is subject to daily pressure from residents, commuters, local business activity and developers. Both urban and countryside areas are affected by these pressures for development use to provide new homes, new places of work, and new places for shopping and leisure/entertainment.

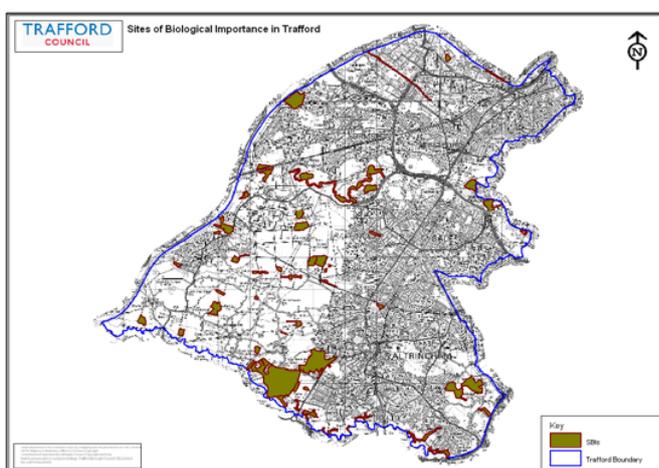
The Trafford Green Space audit identified 1,275 hectares of green and open space in the Borough, which equates to 10.5% of its total land area.

Designated Sites of Special Scientific Interest (SSSIs) are important as they support plants and animals that find it more difficult to survive in the wider countryside. Protecting and managing SSSIs is a shared responsibility, and an investment for the benefit of future generations. The unique and varied habitats of SSSIs have developed over hundreds of years through management practices such as grazing and forestry, and need active management to maintain their conservation interest. Maintaining goodwill and building upon the enthusiasm, knowledge and interest of owners is vital to successfully manage these nationally important sites.

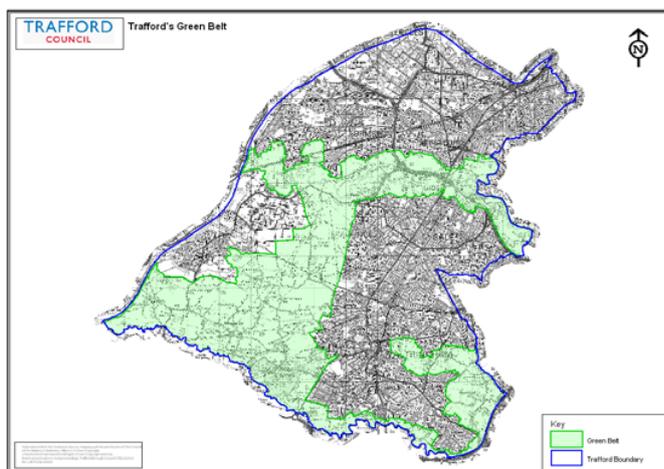


The number of SSSIs in the Borough has increased in recent years but is modest in terms of quantity and land area covered, mostly contained in Dunham. 80 hectares of broadleaf, mixed and yew woodland contribute to the lowland SSSIs of Dunham Park, and a further 2.5 hectares of similar lowland can be found at Brookheys Covert. There is potential to create another SSSI designation in Carrington on the Shell Ponds.

Sites of Biological Importance (SBIs) are identified by the Greater Manchester Ecology Unit (GMEU). SBIs do not have statutory protection, but those in Trafford are protected. SBI selection is based solely on ecological attributes, including exemplification of a habitat type; biodiversity of habitats/species; rarity of species present; naturalness of the site/substrate; and fragility of the site.



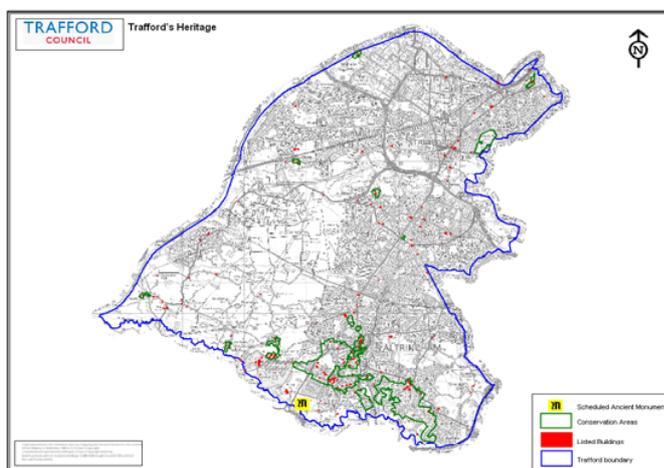
There are 51 SBIs within the Borough covering an area of 430 hectares, within three grades. 7 of Trafford's SBIs are classed as grade A (of county importance), covering over 150 hectares. The 18 grade B SBIs (of district importance) cover a similar area and the 26 grade Cs (of more than local importance) cover only a slightly smaller total area. SBIs in Trafford tend to be located away from densely populated areas and in the south and west of the Borough.



Almost two fifths (38%) of land area in Trafford is countryside and designated as Green Belt. A substantial part of this countryside, lying to the west of the main built-up area of the Borough, including Carrington Moss and rural Dunham and Warburton, supports arable farming activity. The Timperley wedge to the east of Altrincham, with less rich soils, supports a mixture of pasture, horticulture and recreation uses. The Mersey Valley, between Stretford and Sale in the north, and the Bollin Valley abutting the southern boundary of the Borough support golf courses, nature conservation, formal and informal recreation uses.

Trafford has 34 allotment sites with a capacity of approximately 1,500 half/full sized plots, covering 40 hectares of land. Demand for allotment plots is high in Trafford, with over 500 people on the current waiting list, with the highest demand in the Altrincham area.

Trafford has 21 Conservation Areas, the majority of which are located in the south of Borough. The Council seeks to protect and enhance the architectural, archaeological, and cultural and heritage value of these designations.



Trafford has 3 Registered Parks and Gardens of Special Interest: Dunham Massey, a Grade II*; Sale and Brooklands Cemetery which is Grade II and Stamford Park, also Grade II.

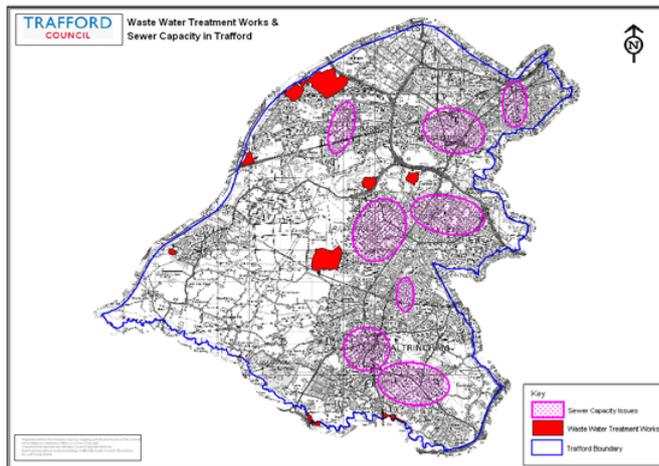
Trafford also has one Scheduled Ancient Monument, Watch Hill motte and bailey castle, 450 metres south of Streethead Farm.

On the whole there is good access to green space and natural habitats in Trafford, and the neighbourhood and street scene cleanliness is the best in the North West. However, there are some areas within the Borough which are deficient in accessible good quality green space.

Water

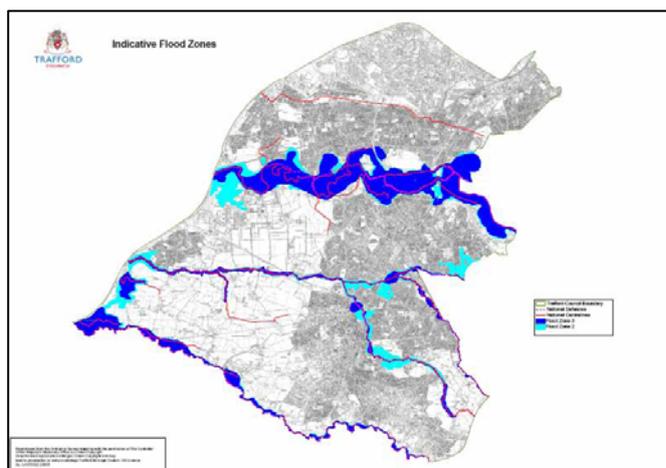
Trafford is currently provided with drinking water from major Lake District and South Pennine reservoirs and transported into and across Greater Manchester by the Thirlmere and Longendale aqueducts and the Manchester Ring Main.

The Manchester ring main is a large water pipeline that circles the outskirts of the city. The pipeline supplies up to 560 million litres of water a day to over two million people in Manchester.



Waste water treatment facilities are provided at the 5 smaller and one larger location, as shown on the map. The larger site in Davyhulme is the primary facility with scope to accommodate additional capacity. The map also indicates areas which are currently experiencing sewer capacity issues. These tend to be highly populated areas including town and district centres.

There are two flood basins within the Borough. One is located in Sale Waterpark (Sale Ees Basin) and the other in playing fields near Broadheath and west Timperley (Timperley Basin). Sale Ees Basin is operated in conjunction with Didsbury basin (Withington Golf Course, in Manchester) to control the peak flow associated with floods having a return period in the range 4 to 13 years. It became operational in the mid 1960's and was designed to control peak flows through Barefoot Aqueduct that carries Bridgewater Canal. The purpose of the Timperley Flood Basin, located to the north of Viaduct Road and west of the Bridgewater Canal Timperley, is to protect the area downstream.



A vast indicative flood zone is located across the middle of the Borough known as the Mersey Valley, where the land use is primarily of environmental importance and Green Belt. Other indicative flood zones are located along Sinderland Brook, Timperley Brook, Red Brook and the River Bollin.

In conclusion

Trafford enjoys a high quality environment and we recognise the need to carry on protecting this in a sustainable manner. To do this we need the relevant statutory partners to translate International, European and National Environmental policies. This translation will allow us to operate a Greater Manchester and indeed local Environmental Management System.

Within this system, we must deliver physical, social and environmental improvements and prosperity to the Trafford area and partners should seek to continue and increase their work with schools, businesses and residential communities to achieve these improvements.

Trafford Sustainable Community Strategy articulates that in Trafford, we are committed to sustaining a high quality local environment and that more attractive public spaces are enjoyed by all; people need to work together to ensure that what we do today does not compromise the future enjoyment of the Borough. To achieve this we shall:

- Ensure a high level of awareness of environmental issues.
- Take steps towards reducing the environmental impact of activities which are identified as having a significant impact, and set targets for improvements.
- Do all we can to prevent our environmental pollution.
- Consider environmental issues when purchasing products and services.
- Minimise the amount of waste disposed of to landfill by reducing and recycling waste produced by every organisation.
- Promote, educate and enlighten third parties who we come into contact with, such as schools, communities and business, with the importance of reducing their environmental impact.
- Communicate environmental performance to all interested parties.
- Regularly review the environmental policy and objectives.

Place: Key questions

Physical Development, Infrastructure & Transport

In order to provide a strong investment and development direction that will enable us to transform Trafford into a state of the art sustainable mixed use environment, we need to direct investment and determine land use allocations.

- 1. How can we work better with landowners/developers and other key stakeholders (public & private) to ensure that we agree a shared vision for Trafford's key sites?**
- 2. What are the key public transport priorities?**
- 3. How do they influence economic growth?**

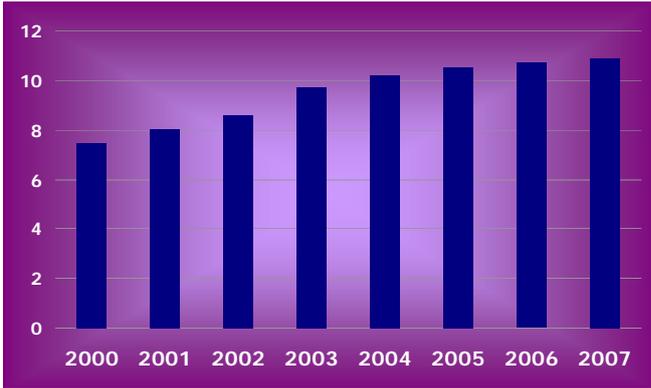
The Visitor Economy & Tourism

Within the sub region, outside of Manchester city centre, Trafford has the most significant leisure offer in terms of visitor attractions, with well known regional and international visitor attractions pulling in large numbers of leisure & business visitors annually.

The long term viability of tourism and retention of the tourism base relies upon achieving satisfaction at all stages of the visitor's experience. The technique required to maximise the benefits of urban tourism is to convert day visitors into overnight visitors in order to increase the amount of their cash injected into the local economy since, on average, a day visitor spends less than an staying visitor. Continually increasing and improving the tourism offer is key to increasing the number of people visiting the Borough. Part of this is working with existing venues to strengthen and expand their offer and part of this is attracting new attractions to the area.

8,200 jobs in Trafford are supported by tourism. More than 10.8m visitors come to Trafford annually contributing more than £542m to Trafford's economy, of which more than £84 million is in the food and drink sector alone.

Visitor Numbers



The table to the left illustrates the significant growth in Tourism over a 7 year period with an increase in numbers from less than 8 million to well over 10.5 million. Tourism remains one of the key employment growth sectors and interest in exploiting the sector (particularly in Trafford Park) is definitely on the increase.

One of the issues that we have faced in recent years is being able to provide high quality hotel accommodation for visitors and this now appears to be coming to fruition.

Categories of Visitor by Revenue

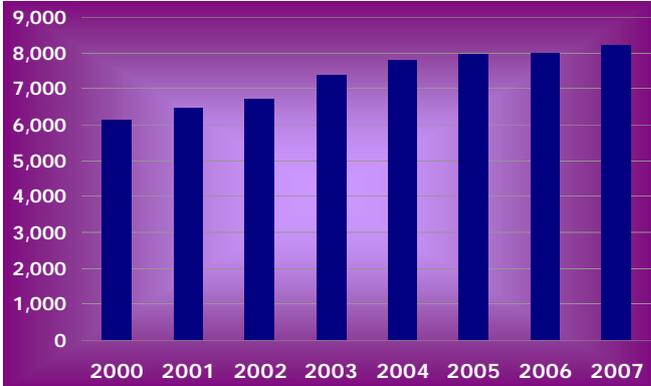


The table on the left clearly illustrates the level of dependence that we have on day visitors to Trafford. Part of the aim of strategic tourism is to increase the number of visitors that are staying overnight in the borough to grow the contribution of tourism to the local economy.

Any local authority should look to convert day visitors into overnight stays.

There is a steady pattern of visitors staying in serviced accommodation and an Easter catalyst for day visitors following the traditional dip in the winter months. Staying with friends and relatives shows an increase in numbers in the build up to Christmas.

Local Employment in Tourism



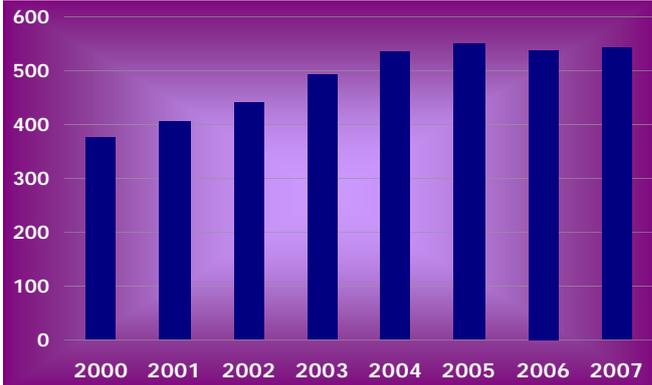
Employment in the sector has showed a steady increase from around 6,000 to over 8,000 over the 7-year period.

Much of this increase has been in retail opportunities and the food and drink sector.

The catchment of employees in these sectors stretches as far afield as Merseyside, especially around people in the younger end of the labour market looking to gain more senior experience within a very tight labour market.

Economic Impact of Tourism

Total Visitor Expenditure (£million)



The impact of tourism on the Trafford Economy has increased from £375 million to £540 million over 7 years. These figures are indexed and standardised so that actual difference in spend is measured and not the inflationary pressures that appear in the economy.

The multiplier effect of that amount of income on the economy should not be understated and the potential is that within a decade with an expansion of tourism it could become a £1 billion plus segment of the economy.

Visitor Attractions

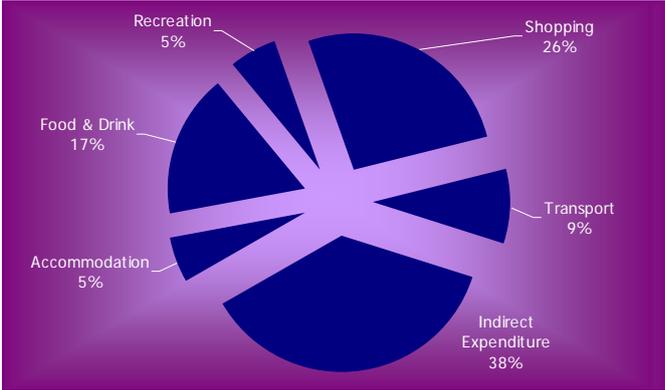
The attraction of people to Trafford is mainly focused into two distinct markets. The north of the Borough attracts the visitor looking for a sporting or urban/waterfront experience with the unique cluster of attractions enveloped in The Quays. Manchester United, Lancashire County Cricket Club and Imperial War Museum North attract a large number of leisure visitors and not just for their primary function: the two sporting venues also provide a sport related learning and museum experience as well as acting as concert venues. All major venues attract additional visitors through their conference and hospitality offer.

Still in the North of the Borough, the Trafford Centre is the largest out of town leisure shopping destination in the North of England. The opening of Chill Factor in Autumn 2007 on the adjacent regional sports complex added a NW first and regional draw as one of only 4 'real snow' slopes in the UK.

The south of the Borough attracts visitors looking for an independent retail and restaurant offer as well as rural attractions which are anchored by the National Trust's Dunham Massey Hall and Gardens. There is also a diverse range of smaller attractions including the Cinnamon Club and Altrincham Ice Rink (home to Manchester Phoenix Ice Hockey team), with a similarly diverse audience.

Trafford is in the fortunate position of offering a wide selection of high quality independent and chain restaurants. Those likely to pull in visitors from outside the immediate area are concentrated mainly in the south of the Borough.

Types of Expenditure in Tourism



The pie chart to the left splits the percentage and type of expenditure of tourists in Trafford. More than a third of the quantifiable expenditure is on shopping and food and drink. This reflects national patterns of expenditure proportionately, however further work needs to be carried out to establish precisely what the indirect expenditure is spent on.

Trafford's Visitor Economy and Tourism Framework

Working in partnership with the Trafford Economic Alliance and key partners, a framework has been developed to maximise the positive contribution that tourism can make to the image, the environment and to the economic and social well-being of Trafford. Its adoption, which recognizes a number of overarching and council-wide strategies, plans and frameworks, will enable the council, its partners and businesses involved in the visitor economy to make informed decisions.

In Conclusion

The diversity of Trafford enables it to appeal to a broad range of markets but this can also cause problems in projecting a coherent image. Visitors to Manchester who cross the border into Trafford to visit Manchester United, the Trafford Centre or The Quays may not realise they are in Trafford; similarly visitors to Cheshire who cross the border to visit Altrincham, Dunham & Warburton may well assume they are still in Cheshire. The downside to this for Trafford is that despite being home to a number of significant attractions many residents, businesses and visitors won't recognize the borough as a 'Tourism' destination.

The quality of the tourism offer is a key challenge to the Trafford Economic Alliance, ensuring that a higher proportion of every pound spent is then re-invested within Trafford.

Place: Key questions

Tourism

Tourism is a key driver for economic growth and generates £380 of income and 6,100 jobs into Trafford per year as well as boosting its national and international profile

- 1. How do we develop the Trafford Tourism product, profile and promotion?**
- 2. What steps do we need to take to ensure the physical environment/ infrastructure contributes to a sustainable visitor economy?**
- 3. How do we secure and sustain resources for tourism promotion and development?**

Town Centres

Trafford has four town centres – Altrincham (the largest centre), Sale, Stretford and Urmston – and a number of smaller district centres. The town centres provide the focus for shopping, leisure and community facilities both during the day and into the evening, with a variety of convenience, comparison and service businesses on offer as well as Library and Council services.

Town Centres also provide a hub for community activity, including events and projects to promote the town centres in conjunction with the Town Centre Partnerships. In addition, they offer opportunities to access sports and leisure facilities that help contribute to the quality of life and wellbeing for people of all ages.

Trafford's town centres are recognised as key to the economic prosperity of the Borough and are one of the strategic priorities identified by the Trafford Economic Alliance. As such, the continued development of its towns as commercial, retail and leisure hubs providing a range of employment opportunities and attractive locations for businesses is an important focus. Priorities and issues for the town centres focus on the areas of skills and experience, business support and development, investment, locations and infrastructure.

For each town centre, we have focused on four key areas identifying the area's retail 'health':

- Diversity of Use
- Representation of High Street Multiples
- Employment
- Rents

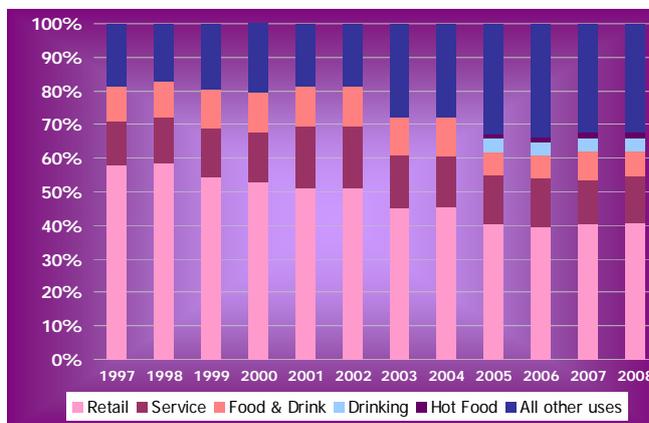
Altrincham

Altrincham is Trafford's main town centre and has been a market town for centuries, combining an historic past with the convenience of modern pedestrianisation and good transport links. It has a range of specialist shops, key High Street names and an excellent choice of eateries, attracting many visitors, particularly on market days.

The Stamford Quarter, one of the main shopping areas, has recently completed Phase 2 of its major redevelopment, adding some exciting new quality retailers to enhance the town's retail mix. Developments in the pipeline include a Grafton Mall redevelopment, a mixed use scheme on Railway Street and the £150 million Altair scheme which combines leisure, office, retail, a hotel element as well as a permanent home for the ice rink.

A five-screen multiplex Apollo cinema, in another key location in the town, is proving one of the most popular of the Apollo Group's North West cinemas.

Diversity of Use



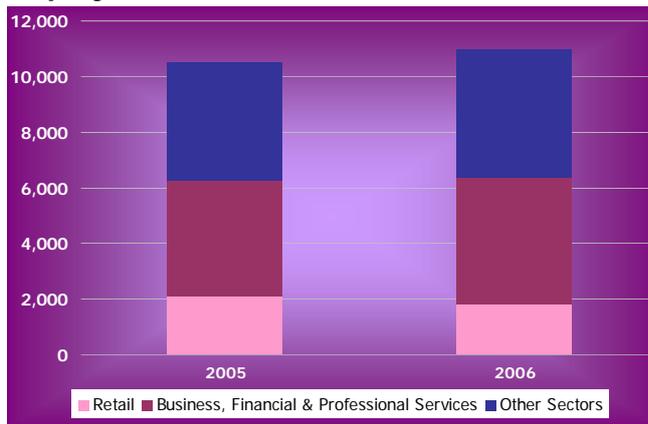
The graph to the left illustrates the type of usages in Altrincham town centre, showing a reduction in retail from nearly 60% in 1998 to around 40% in 2008. Meanwhile, there has been an increase in the percentage of food & drink outlets, including restaurants and bars, from 10% in 1999 to 13% in 2008. The biggest increase is in 'other' uses, including leisure and housing, adding to the vibrancy of the town centre, primarily to help their long-term sustainability. All these reflect the changing role of town centres nationally.

Representation of High Street Multiple Retailers



The graph to the left illustrates the increase in multiples from 22% in 1997 to 34% in 2008. This illustrates confidence in the town from national and international concerns. Decisions made nationally about the future and locations of multiples, however, impact on their contribution to the town centre. A good range of independent and specialist businesses provides a balance and adds to the town's attractiveness to shoppers.

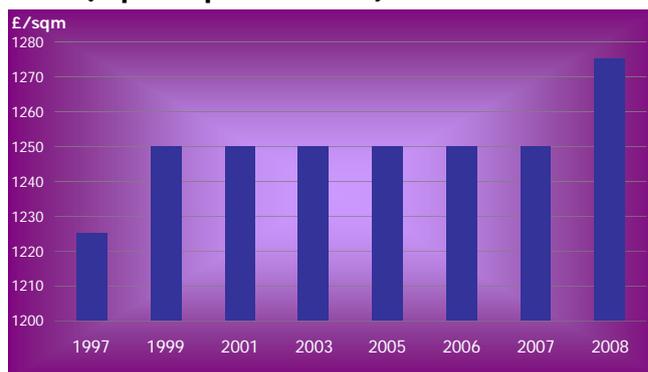
Employment



The graph to the left shows the change in patterns of employment in Altrincham over the last 2 years.

Ongoing development within the town centre has reduced the proportion of employment in the retail sector, which we would now expect to be much higher with the phased completion of the Stamford Quarter, among other projects. The increasing number of employees in the Business, Financial & Professional Services sector illustrates how Altrincham is an attractive place for this growing sector.

Rent (£ per square metre)



The graph to the left shows the changing levels of rents demanded for retail properties in Altrincham.

Perhaps surprisingly, rental rates have remained steady through a period of relative change in the town, reflecting high levels of investor confidence. This confidence appears to have been well-placed: the completion of stage 1 of the Stamford Quarter has raised the average rental level significantly.

In Conclusion

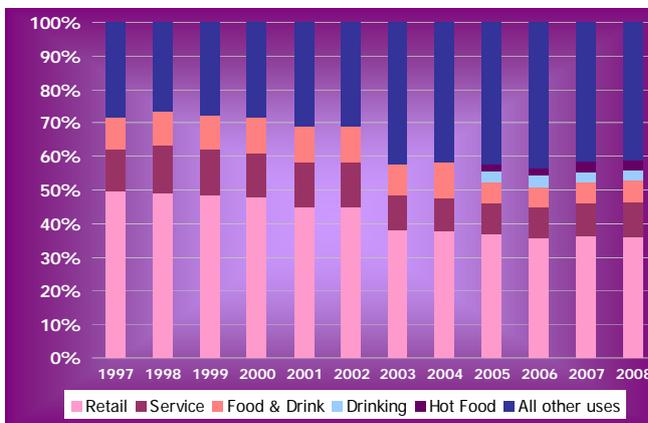
Altrincham offers the greatest opportunity of all of the town centres in Trafford and has a catchment well in excess of 80,000 residents. However it does face stiff competition from the sub-regional shopping centres of Warrington and Stockport in addition to local towns as well as out of town centres and online shopping.

Sale

Sale is host to over 200 retail and specialist businesses as well as having a good food and drink offer. Pedestrianised shopping is offered on its tree-lined main road, nearby streets and in The Square at Sale Shopping Centre. Situated at the heart of Trafford, Sale is easily accessible by Metrolink, bus, cycle and car with the M60 motorway less than a mile away. The town is also linked to the main waterway networks in the North West by means of the Bridgewater Canal, running through the centre of Sale. Sale is also well served with a number of leisure facilities.

The Waterside development in the centre of Sale incorporates Sale Waterside Arts Centre, the 350 seat Robert Bolt Theatre, a refurbished library and youth centre, the restored Sale Town Hall building, a home for centralised Council services, new bars/restaurants and a canalside plaza.

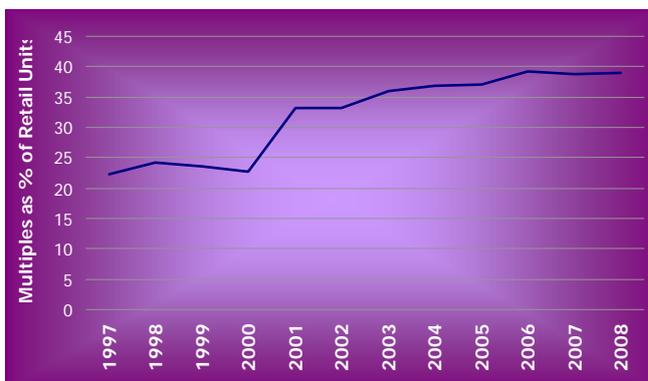
Diversity of Use



The graph to the left illustrates the type of usages within the town centre of Sale. This shows a reduction in retail from nearly 50% in 1998 to just over 35% in 2008. Meanwhile, there has been an increase in the percentage of food & drink outlets, including restaurants and bars, from 10% in 1999 to 12% in 2008. The biggest increase is in 'other' uses, including leisure and housing, adding to the vibrancy of the town centre.

The above reflect the changing national patterns in the role of town centres.

Representation of High Street Multiple Retailers



The graph to the left illustrates the increase in multiples from 22% in 1997 to 39% in 2008. This illustrates confidence in the town from national and international concerns. Decisions made nationally about the future and locations of multiples, however, impact on their contribution to the town centre. A good range of independent and specialist businesses provides a balance and adds to the town's attractiveness to shoppers.

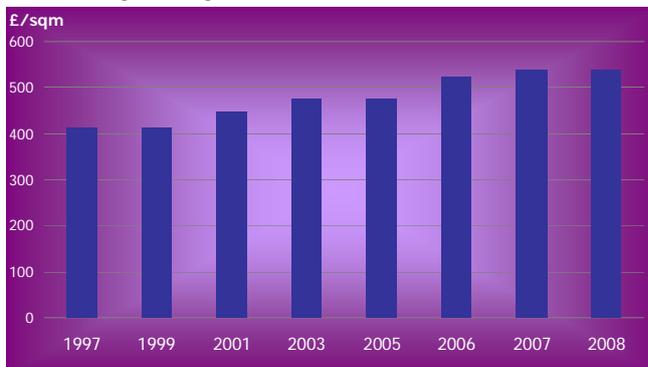
Employment



The graph to the left shows the change in patterns of employment in Sale over the last 2 years.

Employment in the retail sector has reduced slightly but increased by 6% in the Business, Financial and Professional Services and by 9% for other sectors including leisure and housing, indicating the importance of these sectors to employment in Sale.

Rent (£ per square metre)



The graph to the left shows the changing levels of rents demanded for retail properties in Sale.

Rental rates increased gently throughout the construction of the Waterside complex. They have levelled off gradually since then, which reflects minimal change in the town centre but also means that the centre is relatively affordable.

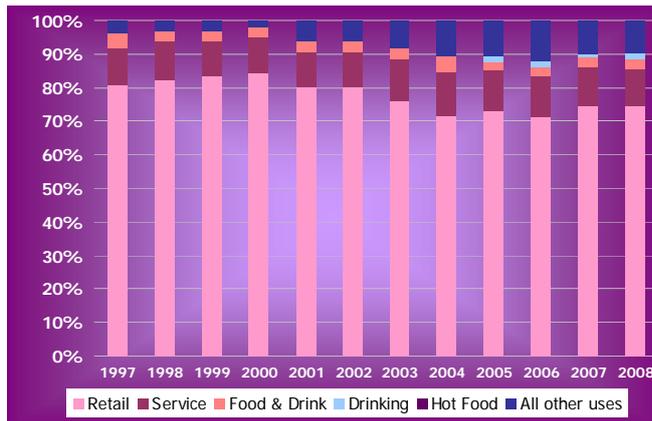
In Conclusion

Salé has a burgeoning business and leisure related sector and that is coupled with scope for further comparison goods provision, according to the latest Trafford Retail and Leisure Study. The challenge will be to ensure a good retail offer in the current climate and with a number of competing centres nearby.

Stretford

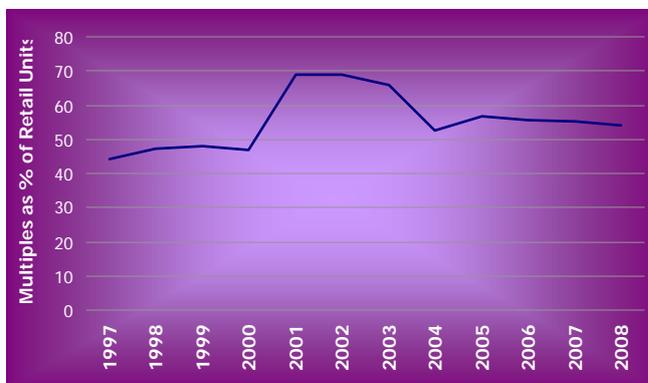
Stretford, located at the northern end of the borough on the main A56 corridor, has a vibrant, purpose built, covered shopping centre—Stretford Mall - which forms the main town centre area, bringing together a range of High Street names and offering good consumer choice. There are also additional businesses and facilities on nearby roads. With frequent bus and Metrolink services and easy access by road, Stretford attracts visitors from outside the area as well as local residents.

Diversity of Use



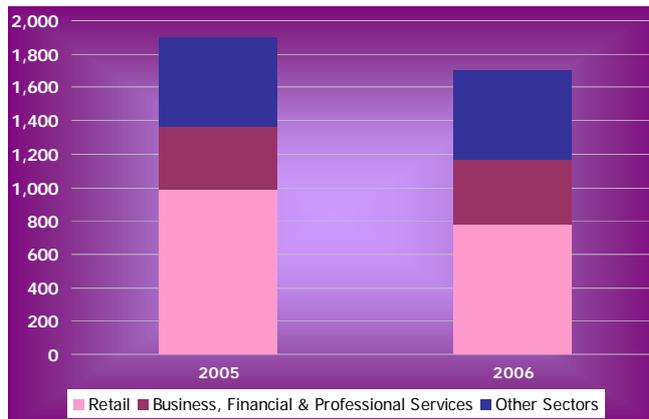
The graph to the left illustrates the type of usages within the town centre of Stretford. This shows a reduction in retail from around 80% in 1998 to just over 70% in 2008, but it is still a significant part of the town centre offer, reflecting the main space occupied by the privately owned Stretford Mall. The low level of other town centre uses also reflects this, as well as the need to have a better family orientated, leisure & food and drink offer.

Representation of High Street Multiple Retailers



The graph to the left illustrates the increase in multiples from 45% in 1997 to 55% in 2008. This indicates interest in the shopping centre by high street companies. Decisions made nationally about the future and locations of multiples, however, impact on their contribution to the town centre. The town centre would benefit from additional independent and specialist businesses.

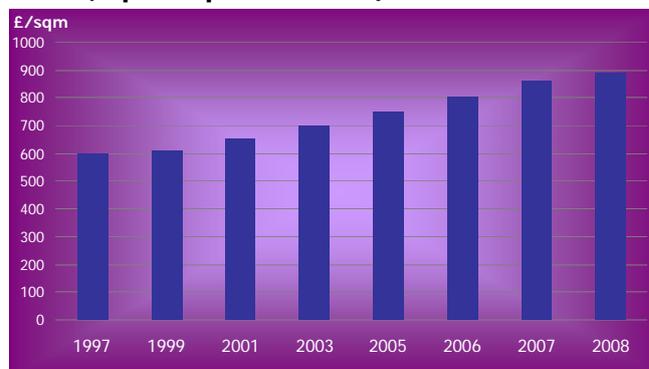
Employment



The graph to the left shows the change in patterns of employment in Stretford over the last 2 years.

Although the proportion of employment in the retail sector has reduced, it still accounts for a high proportion of employment which is to be expected with a private shopping centre forming the main part of the town.

Rent (£ per square metre)



The graph to the left shows the changing levels of rents demanded for retail properties in Stretford.

Rental rates have increased steadily and significantly since 1999, reflecting the increased dominance of multiple retailers in Stretford Mall and the national market for this type of retailer.

In Conclusion

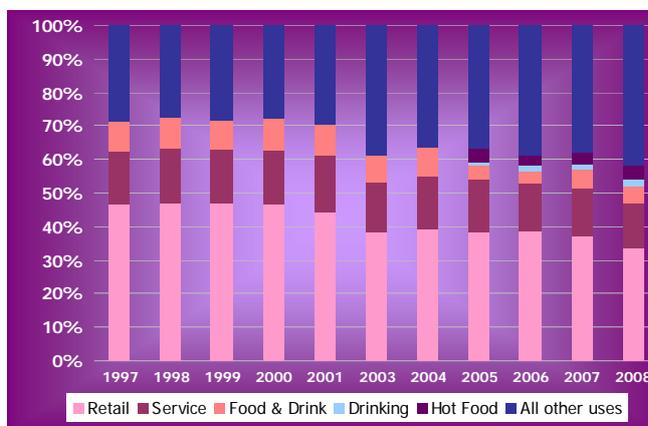
Stretford benefits from a relatively high proportion of retail businesses but the lack of dining and family orientated evening leisure uses detract from a wider town centre role. Further potential development opportunities exist in Stretford as highlighted in the latest Retail and Leisure Study.

Urmston

Urmston is one of Trafford's smaller town centres and has good access by train, bus and car. There is a variety of unique, independent outlets and family businesses, some High Street stores and a selection of services as well as dining and drinking options. The traditional, privately owned outdoor market and food hall is open on Tuesdays, Fridays and Saturdays.

A major redevelopment of the town's shopping centre to replace the dated 1960s precinct is ongoing. The plans include a modern state of the art library and community facilities, along with a new Sainsbury's, a mix of local and high street retailers, new restaurants/café bars, decked car park and contemporary apartments. The first phase of the development is due for completion in 2009.

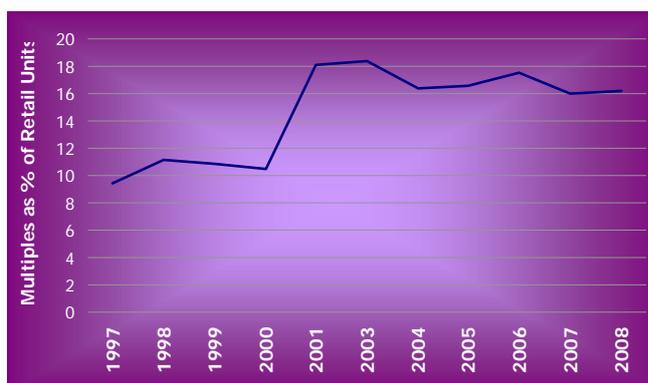
Diversity of Use



The graph to the left illustrates the type of usages within the town centre of Urmston. This shows a reduction in retail from just over 45% in 1998 to just under 35% in 2008, reflecting the ongoing development work in the main retail shopping centre. Meanwhile, there has been a small increase in the percentage of food & drink outlets, including restaurants and bars, from 9% in 1999 to 11% in 2008.

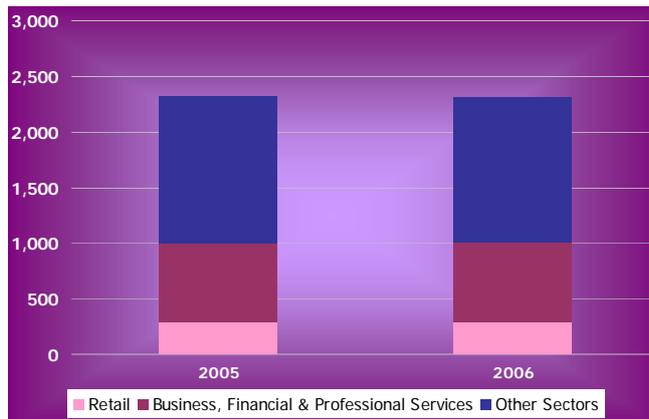
The biggest increase is in 'other' uses, although this is largely due to an absolute decrease in the number of units as a result of the redevelopment.

Representation of High Street Multiple Retailers



The graph to the left illustrates the increase in multiples from under 10% in 1997 to 16% in 2008. This illustrates a heightening confidence in the town from high street retailers. Decisions made nationally about the future and locations of multiples, however, impact on their contribution to the town centre. A good range of independent and specialist businesses provides a balance and adds to the town's attractiveness to shoppers.

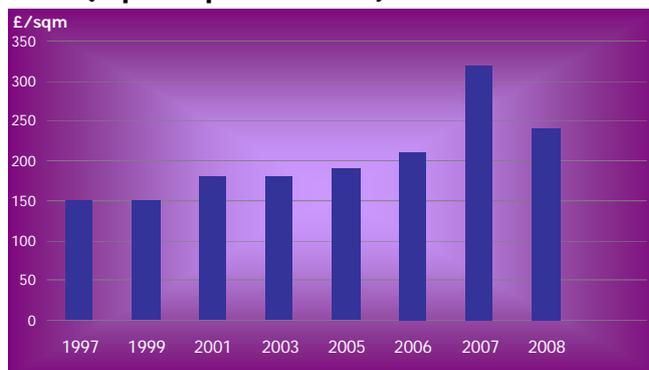
Employment



The graph to the left shows the change in patterns of employment in Urmston over the last 2 years.

Ongoing development within the town centre has reduced the proportion of employment in the retail sector, which we would expect to become higher with the phased completion of the shopping centre redevelopment. Other sectors including leisure, restaurants, bars/drinking establishments, health and beauty, schools and clubs/halls also provide a large proportion of employment in the area.

Rent (£ per square metre)



The graph to the left shows the changing levels of rents demanded for retail properties in Urmston.

Rental rates strongly reflect the availability of desirable properties: the spike in 2007 shows the lack of available properties due to the beginning of construction work on the new centre.

In Conclusion

Urmston's ongoing major redevelopment of its retail core, together with some environmental improvements, has encouraged investor interest in the town and should increase its sustainability long term.

In Conclusion

The three year Town Centres Plan is a priority for the Trafford Economic Alliance. The plan has been put together with the help of organisations and businesses working in Trafford's towns to capture a shared approach to town centre activities and how town centres develop and continue to attract shoppers, visitors and investment. The Plan focuses on crucial areas vital to town centre success such as access, investment, environment, marketing, security and business support and links in with national and regional policies.

Town centres make a significant contribution to the Borough's economy, providing employment, investment, and unique, complementary identities for Trafford's four main areas, creating the opportunity to develop their roles to reflect social trends.

The challenge will be ensuring that Trafford's towns continue to attract business, customers and investment during the current economic climate and with competition from an increasing variety of sources.

Place: Key questions

Town Centres

Town Centres provide the lifeblood for the Borough giving not only identity to Trafford's 4 main areas but also opportunities for retail, leisure and entertainment.

- 1. Which types of retailers, businesses or services are missing from our town centres?**
- 2. How do we address the issue of proactively attracting appropriate investment in our Town Centres?**
- 3. What are the most important issues facing each of our town centres i.e. access, encouraging investment, improving the environment, marketing the towns, safety and security and supporting business?**

Key Questions

Strategic Context

The single regional and sub regional strategies will include transport, housing, planning, social and environmental issues as well as economic development.

- **How will this influence and support our local economic development priorities?**

The NWDA is reforming its delivery moving more from projects to programmes and delegating decisions to local and sub-regional levels.

- **How can we best position Trafford to take advantage of this?**

People

Improving Skills:

LSC 'Train to Gain' has demonstrated that workforce development can be used as a solution to business problems and or as a driver for business growth and improving competitiveness.

- **Are we targeting employers in the right sectors with the right training?**
- **What do we need to do to drive up demand for training from employers and employees in the future?**

Reducing Worklessness:

Worklessness in Trafford is concentrated in 3 main areas this equates to 1 in 3 of the working age population.

- **What is the best approach to addressing worklessness in Trafford's deprived neighbourhoods?**
- **What would have the most impact in improving access to provision in order to encourage economic activity?**

Business

Business Support and Enterprise :

Trafford has the highest proportion of companies per head of population in the city region.

- **How well does the current business support offer respond to the needs of our high levels of enterprise?**

Attracting and then retaining appropriate investment in Trafford is key to driving economic growth.

- **How, through planning policy, do we ensure that we have the right premises and locations to enable the Borough to remain competitive?**
- **What kind of relationship does Trafford want to have with the Conurbation's Higher Education Institutions and concentrations of Research & Development?**

Place

Physical Development, Infrastructure & Transport

In order to provide a strong investment and development direction that will enable us to transform Trafford into a state of the art sustainable mixed use environment. We need to direct investment and determine land use allocations.

- **How can we work better with landowners/developers and other key stake holders (public & private) to ensure that we agree a shared vision for Trafford's key sites?**
- **What are key public transport priorities?**
- **How do they influence economic growth?**

Tourism

Tourism is a key driver for economic growth and generates £380 of income and 6,100 jobs into Trafford per year as well as boosting its national and international profile.

- **How do we develop the Trafford Tourism product, profile and promotion?**
- **What steps do we need to take to ensure the physical environment/infrastructure contributes to a sustainable visitor economy?**
- **How do we secure and sustain resources for tourism promotion and development?**

Town Centres

Town Centres provide the lifeblood for the Borough giving not only identity to Trafford's 4 main areas but also opportunities for retail, leisure and entertainment.

- **Which types of retailers, businesses or services are missing from our town centres?**
- **How do we address the issue of proactively attracting appropriate investment in our Town Centres?**
- **Please the most important issues facing each of our town centres i.e. access, encouraging investment, improving the environment, marketing the towns, safety and security and supporting business?**



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COUNCIL

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