



Trafford Park Masterplan Baseline Assessment

A Report for the Trafford Economic Alliance

By EKOS, CBRE, URBED and WSP

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EXECUTIVE SUMMARY

Introduction

This the Baseline Report provides the evidence base to inform the development of a Masterplan for Trafford Park. The Baseline Report has been produced by a team of consultants led by EKOS, and also including CBRE, WSP and Urbed. It includes an analysis of the planning and regeneration context, urban design headlines, key transport issues and property market analysis. It also includes an assessment of business needs and aspirations obtained via a survey of businesses on the Park. The work is the result of a mixture of desk based analysis, site visits and consultation.

The work has been commissioned by Trafford Borough Council in conjunction with the North West Development Agency. It is overseen by the Trafford Economic Alliance Place Group, a sub-group of Trafford's Local Strategic Partnership.

Study Context

Trafford Park was the world's first purpose built industrial Park and remains Europe's largest, covering 3,000 acres and home to 1,400 companies employing 35,000 people. It has endured periods of both growth and decline during its 112 year history, with its peak in the 1940s and 1950s when it employed over 75,000 people. From the mid 1960s and 1980s however it suffered a period of decline and loss of employment, revived partly by the work of the Trafford Park Development Corporation in the 1980s.

More recently, Trafford Park has seen the introduction of a range of new uses. Whilst industrial warehouses dominate the core of the Park and manufacturing still accounts for a significant proportion of all employment on the Park, the area is now also home to a range of leisure, retail, commercial and residential uses. Developments such as the Trafford Centre, Salford Quays, and Mediacity:UK have impacted on the area's dynamics. Trafford Park has not seen a Masterplan since the days of the Development Corporation and given the scale of recent change in the area both in the past decade and planned for future years as well as its ongoing importance to the regional economy, it is a timely point to produce a Masterplan in order to set a clear investment direction for the next phase of the Park's development.

Regeneration and Planning Policy Review

Given the scale of Trafford Park, its future development is of significance on a regional and even national scale. In order to ensure that its full potential is realised, it is important that economic development and spatial planning policy in the Park is aligned and developed with a thorough appreciation of market and commercial drivers. Development proposals for the Park should seek to deliver local, sub-regional and regional economic priorities as well as

making close links with development activities planned or underway adjacent to the Park. This section of the Report reviews a range of regeneration, planning and transport strategy/policy, setting out their key objectives and priorities and how these will link with the Masterplan. It also considers the development context within which the Masterplan is being developed.

Proposals developed for the Park should seek to meet the objectives of a range of local, sub-regional and regional planning / regeneration policy. While the full status of the Masterplan is to be confirmed, but it should influence planning policy in the Park, informing the Local Development Framework and setting out a co-ordinated approach to the Park's future development. It should also provide clarity regarding issues such as design standards, environmental objectives and the use of developer contributions. The Park is located outside of the regional centre in RSS terms, which is likely to affect its ability to accommodate major developments in certain use categories. In addition, emerging transport policy, in particular TIF and the proposed Metrolink expansion, could have a major impact on travel and occupancy on the Park.

The Park has seen significant changes over recent years, particularly on its edges which has impacted upon the area's dynamics. In particular, leisure, retail, residential, business and digital / creative uses have been introduced to the area. Proposals should make links with major developments / regeneration programmes such as Mediacity:UK, residential proposals and the Irwell City Park initiative, to maximise the impact of the Park on the local area and regional economy.

Finally, a series of emerging strategic employment sites are likely to increase competition for the Park across the North West. The location and established business base on the Park is a major positive in comparisons with many other sites. It's profile as a premier, sustainable business location and major economic asset for the regional economy should be raised.

Economic Activity on Trafford Park

A robust economic baseline and understanding of the businesses operating on the Park is a critical starting point to inform the Masterplan and develop sound recommendations for its future development. This chapter assesses the current business base on the Park, as well as analysing recent trends and future business / employment forecasts, and the performance of the key sectors which dominate the local economy.

According to the ABI, Trafford Park contains approximately 1400 businesses employing around 32,000 people. Employment is dominated by manufacturing (despite recent decline) and retail trade, which each employ over 7,000 people on the Park. The wholesale and motor trade, real estate and business activities and distribution sectors are also major employers on the Park.

Trafford Park has seen a substantial period of employment and business growth over the period since the mid 1990s, with employment increasing (although this has levelled off since 2004). Throughout this period there has been a shift in the sector make up of the Trafford Park economy. Manufacturing accounted for over 50% of employment in 1991, yet this has declined significantly since although it still remains a major employer. Decline has been particularly stark in heavy manufacturing (machinery and equipment) although employment in food and beverage companies has remained high.

There has been significant growth in retail and wholesale trade, mainly due to the introduction of the Trafford Centre, whilst there has also been growth in real estate and business activities which are playing an increase role in the Park's economy. Distribution companies account for a significant proportion of land use on the Park given their need for large units. The sector accounts for 8% of total employment on the Park and has remained relatively constant employing between 2,600 and 3,000 people. Finally, the construction sector has seen some growth over recent years.

Businesses on Trafford Park tend to be larger than elsewhere in the UK, with a high proportion of medium and large size companies. Whilst 37% of employees work for medium sized companies on the Park compared with 23% nationally, just 9% work for micro firms compared with 21% nationally.

Employment forecasts are strong for Trafford, driven primarily by increases in business services employment as well as smaller increases in sectors such as transport and communications, retail, wholesale and distribution, construction and hotels and restaurants. Employment decline is forecast to continue in manufacturing which is likely to be a key concern for the Park given its current reliance on the sector for much of its employment. Manufacturing decline in Trafford is forecast to be less than elsewhere.

In summary the economic analysis has revealed a relatively healthy picture for the Park in terms of employment and business numbers, the introduction of new sectors to the Park, the presence of some well established employers and new major employment developments planned for the area. There are however a series of economic challenges for the Park including the long term decline of manufacturing employment in the UK, the current uncertain economic climate, increasing demands for a higher qualified workforce and competition from other major employment sites in the UK.

Land Ownerships on Trafford Park

This section of the report sets out a detailed plan and analysis of land ownerships on the Park. The Park comprises a relatively fragmented ownership including institutional investors; national and local property companies; high net-worth individuals; owner-occupiers; and football-related interests.

The level of fragmented ownership on the Park reinforces the need for a comprehensive, broad-ranging consultation on the potential future direction of the Park. Whilst the Park does have over 200 known ownerships, there are a few large strategic landowners such as Peel and Brixton which account for a significant proportion of land on the Park.

Development opportunities on the Park are limited due to a lack of available sites, although five relatively major sites which are available on the market / set for development.

Consultation with landowners and investors in the Park has revealed a series of key issues for the Park, including the introduction of a higher value offering; the increased standard of industrial product being brought forward; congestion charging; section 106 payments; the potential extension of the Metrolink; and the security and visibility of sites.

A comprehensive, phased and cohesive redevelopment of the Park is likely to be challenging given the mix of ownerships in the area. However there is evidence of a willingness amongst many owners to bring forward schemes, a belief in their longevity and an appetite to improve the Park. There is a clear potential to enhance the diversity and appeal of the Park, in particular at gateway areas which will have associated benefits for the core industrial area. It will be important to continue to engage with key landowners and investors in the Park during the development of the Masterplan. An ownership map is provided within the main report.

Spatial and Urban Design Analysis

This section of the report sets out the key headline urban design analysis of the Park, covering public realm, land use, townscape areas, street quality, landscape and aerial analysis. A series of plans are provided in the main report to accompany the analysis. The key headline findings can be summarised as follows:

Public Realm: There is a relatively small amount of clearly defined public space and the most significant - the Ecological Park - is not readily recognisable and has restricted access.

Land Use: The Park has no single predominant land use, though clean shed uses are the most prevalent. The Park can however be divided into seven loose character areas.

Townscape Areas, Views, Features, Views and Vistas: The Park has very view vantage points, and whilst there are several interesting structures in and around the Park, it has very few landmark buildings to orientate or understand areas.

Street Quality: There are pockets of well-established green infrastructure in parts, although there are large quantities of unexploited landscape and ignored features.

A library of over 500 photos, including a series of aerial photos, is provided to accompany the report.

Transport and Infrastructure Assessment

This section sets out a baseline assessment of the existing transport, movement and accessibility situation in the Park as well as strategic infrastructure, scoping potential areas for improvement. It will inform a full transport and accessibility assessment in the final Masterplan. A series of supporting transport and infrastructure maps are provided to accompany the analysis.

The assessment revealed a series of positive aspects relating to transport / infrastructure in the area. These include the potential to significantly improve public transport accessibility through the proposed extension of the Metrolink and new interchange at White City. There are relatively low levels of traffic congestion within the Park. In addition, the Park is favourable for walking in some parts and some of the cycle paths within and surrounding the area are of high quality.

Despite the above, there are a series of improvement areas for the Park. The current public transport accessibility situation in the Park continues to be a major issue for businesses and employees. Improved public transport is required in order to facilitate more sustainable modes of travel to and from the Park and to enable people without cars to access opportunities on the Park. The size of the Park also inhibits the encouragement of alternative sustainable transport modes of travel.

Other areas of concern / required improvements highlighted include pedestrian severance, the current high speeds of traffic in the area, the infrequent rail service and the restricted access to / under-use of the area's Waterways.

Property Market Analysis

This section provides an analysis of the current property market within the Park, examining the current types and aspects of accommodation located on the Park, as well as values and availability across the industrial, office, residential, hotel and leisure sectors.

Trafford Park is likely to see a period of transition in certain parts of the Park from industrial usage to higher value mixed use developments focused around office, retail / leisure and residential. The key drivers of change within the Park have been highlighted as the Trafford Centre Rectangle and Wharfside / the Eastern Gateway to the Park. The development of these two areas is likely to have a major impact on the future dynamics of the Park.

The property market analysis provided takes into account the recent economic downturn. In terms of industrial development, the Park has a mixture of less attractive older accommodation and newer accommodation better suited to modern-day occupiers. There has been a recent shift away from larger distribution firms to lighter industry, although there have been 4 large distribution deals over the past 12 months. There has been some investment in

many of the older estates on the Park due to the lack of new large development sites, although the current economic climate suggests that such activity (often risky) is likely to slow down.

Office accommodation on the Park has traditionally been of a lower quality offering than elsewhere, although recently there has been the development of a series of higher quality, smaller pavilion type office buildings in the Park. This type of accommodation is expected to continue to succeed on the Park although it is unlikely that major speculative office developments are likely in the near future under the current economic climate.

There is currently no major residential offering within the Park itself. However, it is expected that residential development will begin to appear within the peripheral areas of the Park in particular around the Trafford Rectangle, Wharfside and Mediacity:UK. The current economic climate, in particular in relation to the house building sector, may mean that such residential development does not occur in the near future although the longer term potential for the Park to accommodate residential schemes remains.

There continues to be considerable demand from hotel operators to locate in Manchester and the surrounding areas and Trafford Park is viewed as a key location by operators given the relationships with Salford Quays, Mediacity:UK, the Trafford Centre and Manchester United.

Trafford Park Business Skills

People travel from a relatively wide catchment area across Greater Manchester and beyond to work at (and visit) Trafford Park, mainly due to its good strategic transport linkages and proximity to the Motorway Network. Over 60% of the workforce however live in either Trafford, Salford or Manchester, with 50% from Manchester and Salford. This section of the Report analyses skill levels, demographics, economic activity and deprivation within the catchment area of the Park, particularly focusing on Trafford, Salford and Manchester (the Core Labour Market Area).

Population forecasts, in particular the working age population, for Greater Manchester are strong, with the trend of decline being reversed in Salford and large population growth forecast for both Trafford and Manchester.

Trafford itself benefits from having a high proportion of higher skilled residents and low unemployment / economic inactivity rates. Its occupational profile is weighted towards higher skilled occupations and there is high GVA growth and enterprise levels. There are some skills issues to be addresses in the Borough however, particularly with regards to the low level of apprenticeships, high proportion of people with learning difficulties and low representation in Train to Gain sector subject areas. In addition, whilst Trafford is relatively affluent compared

with other Greater Manchester districts, there are pockets of deprivation around Partington and Old Trafford in particular.

Salford's working age population has a high proportion of people with no qualifications, and a relatively low proportion of people with higher level qualifications. In addition, pockets of severe deprivation around Central Salford are located close to the Park. Manchester is also home to a high proportion of people with no qualifications as well as a large number of areas of severe deprivation, though many of these are located in the East and North of the city which do not traditionally provide a large amount of workers for the Park.

An analysis of the occupation trends and skills forecasts for the major economic sectors located on the Park suggests that all sectors, even traditional industries, will require higher level skills in the future. In particular this will involve level 3 and level 4 qualifications. Skills requirements were ranked as high priorities amongst the businesses surveyed on the Park. The skills of the current and future workforce as well as the need to link opportunities on the Park to areas of deprivation should be a key consideration of the Masterplan.

Case Studies

Analysis of existing regional, national and international strategic employment sites and business parks process a better understanding of the development potential of Trafford Park.

Trafford Park demonstrates reasonable levels of competitiveness in light industrial, storage and distribution facilities. Although its proximity to the Regional Centre and motorway network offers advantages over some alternate locations, it does not currently have the facilities to offer high quality environments for knowledge based, international inward investors who are interested in research and development.

Regionally, Trafford Park will find attracting inward investment for certain types of end users will be challenging. This is in part due to the NWDA prioritising certain locations for particular uses over that of Trafford Park. In turn, many national industrial estates face similar challenges of declining employment and have shifted to higher value uses such as office and retail.

Although the international case studies were purpose built for the knowledge economy it was possible to draw from them, conclusions with modern connotations. Overall there are two features which are relevant to Trafford Park:

- LA Live has developed very strong branding, with a concentration of knowledge / media based tenants giving it an international focus whilst simultaneously creating and sustaining a destination location.

- The comprehensively planned approach of One North demonstrates the need for iconic, well branded products with excellent transport infrastructure to be developed in order to develop global appeal.

These examples provide number of ideas which are very relevant to Trafford Park, including both the modernisation of older locations and increased marketing and development efforts for both traditional and new sectors.

Regional and national case studies which provided an insight into attributes which Trafford Park could benefit from covered the following key features and suggestions:

- A joined up marketing and regeneration approach would enable medium to long term benefits for the industrial sector as it would encourage modernisation and greater innovation as the industrial core contracts.
- Targets in multi ownership estates are essential in supporting evolutionary development, as is co-ordinated actions across public sector agencies
- Public Transport within Trafford Park is currently severely deficient.
- Trafford Park's future development must capitalise on the development of Media City

Business Survey Findings

As part of the baseline report a survey of businesses located on the Park was undertaken. A range of issues, including current and future property requirements, growth aspirations, business needs and views on the future development of the Park were assessed. Of the 941 surveys that were sent to Trafford Park companies, 120 replied which is the equivalent to a 12.8% response rate and represents the views of around 8% of Trafford Park busiensses.

Some of the key findings from the survey can be summarised as follows:

- There is a large proportion of non UK owned businesses on Trafford park (24.4%)
- There are lots of established business in the Park; 55% have been based there for over 10 years
- There is little or no collaborative working between the companies but there is some desire to do more
- Staff skills issues are important to the businesses. Businesses which recruit through apprenticeships and work experience schemes are struggling to find schools to develop these relationships.
- General skill levels amongst the younger generation are a concern for many businesses on Trafford Park. Willingness and overall attitude towards working are seen to be lacking.

- Public transport links are seen as lacking within the Park and are considered important

The response rate to the survey was encouraging, and over half of the businesses surveyed requested to be involved in future consultations. It will be an important element of the Masterplan to continue to engage with these companies as detailed plans are developed.

Consultation Findings

In addition to the business survey, a series of key stakeholder consultations have been undertaken to inform the research. Though covering a range of topics, some of the most common themes from these interviews can be summarised as follows:

- The changing nature of the Park, in particular around 3 core areas - the Trafford Rectangle, the industrial core and the Wharfside Gateway;
- The implications of the potential congestion charge on Trafford Park;
- The need for more effective branding and marketing of the Park;
- The lack of public transport to / around the Park, in particular its impact on people from priority regeneration areas being able to access opportunities on the Park;
- Issues relating to security and business crime;
- The greater skills expectations of employers on the Park and the shortage of skills in certain, higher level occupations;
- The high level of vacancies on the Park;
- The lack of amenities and resources for employees on Trafford Park;
- The need for the Masterplan to influence planning policy in the area and facilitate future development;
- The lack of one clear voice for the Park and lack networking / joined up working between companies on the Park., landowners and the public sector;
- The use of section 106 contributions; and
- The need to capitalise on major developments planned for the Park, in particular Mediacity:Uk.

It will be important to consider such issues and to continue to engage closely with key stakeholders in the development of a vision and framework for Trafford Park.

Workshops

In order to allow key stakeholders from both the public and private sector to input into the development of the vision, a series of workshops were organised which included a presentation of the main findings from the baseline report with emphasis on the issues and challenges that have been identified, followed by group discussions. Four three-hour workshops were held with employers located on the Park, key landholders and developers (of which a core group control a large proportion of the Park) and public sector agencies and

authorities with activity in and around the Park. The following sections cover the main headings which lead the discussions:

Vision for Future of Trafford Park: there was extensive discussion which highlighted the concern over the influence of a masterplan for Trafford Park both in terms of it's status and also it's reception by neighbouring authorities

Preferred Mix of Uses: strong commitment to maintaining the Parks historic role as a centre for industrial employment, while accepting that there would be some reduction in employment. Agreement of the need for diversification including residential and office, at the appropriate locations in the Park.

Emerging Spatial Strategy: both the public sector and developed workshops acknowledged the need for neighbouring Local Authorities to be supportive of, or neutral to, the spatial strategy.

Transport Infrastructure: there was agreement across the workshops on the need to improve public transport and to improve congestion, although the congestion charge was of concern to many businesses..

Environmental Enhancements and Branding: there was more interest from the public sector, than the private sector in environmental enhancement, although efforts to reduce crime were raised as important by all parties. The need to improve branding was recognised, although this was less of a priority for businesses currently dominated on the Park.

Management, Co-ordination and Workforce Development – Groups were generally keen to see the development of an effective management strategy to help drive forward the various objectives put in place to deliver the vision.

Utility Infrastructure, Energy Efficiency and Sustainability Opportunities – Utility infrastructure is in places poor and it was agreed that this should be addressed as a matter of urgency if the Park is to truly become a 21 Century employment site.

Next Steps

The next stage of the commission will involve taking the findings from the baseline assessment to develop an outline Vision and Framework for the Park. This will be undertaken following a period of consultation on a variety of options relating to:

- The economic drivers that will foster economic growth across the area;
- The spatial vision for the area, based on economic drivers;
- A strategic transport and infrastructure plan required to support the vision; and

- The policy required to support the Strategic Masterplan and any tensions that may require resolution.

Options will be developed through a variety of workshops with partners and the local business community and will draw on the best practice of other industrial locations where transformational change has been delivered or is already underway.

1 INTRODUCTION AND STUDY CONTEXT

Introduction

1.1 This document is a draft baseline report to inform the development of a Masterplan for Trafford Park. It has been produced by a consortium of consultants led by EKOS (economic development and regeneration inputs) and also including CB Richard Ellis (property market), Urbed (urban design) and WSP (transport). The work was commissioned by Trafford Borough Council, in conjunction with the North West Development Agency. The study has been commissioned and overseen by Trafford Economic Alliance Place Group, a sub-group of Trafford's Local Strategic Partnership, which includes officers from Trafford Borough Council, NWDA, Salford City Council, MIDAS, the Greater Manchester Chamber of Commerce and Greater Manchester Passenger Transport Executive.

Study Context

1.2 The 3000-acre Trafford Park was the world's first purpose-built industrial park, and is still Europe's largest. At its peak in the 1940s and 1950s it employed over 75,000 people, and was home to some of the UK and the world's leading manufacturing and food production companies. However, the decline of the Manchester Ship Canal - alongside which it was built - and the eventual closure of the Port of Salford (at one time the UK's 3rd-ranked port) ushered in a period of rapid decline and loss of much of this employment from the mid-1960s through to the 1980s. However between 1987-1998, Trafford Park was revived thanks to the work of Trafford Park Development Corporation, which attracted 1,000 companies, 28,299 new jobs and £1.759 billion of private sector investment.

1.3 Trafford Park today is home to 1,400 companies, employing 35,000 people. This distinct sense of revival is resounding with the prestigious award winning The Imperial War Museum North standing proudly facing the Lowry. The Trafford Centre provides yet another display of commercial success, to be further enhanced by the location of Media City UK in 2010.

1.4 Trafford Park now needs a refreshed and strong investment and development direction that will effect the transformation of the Park and enable it to provide Greater Manchester with a state of the art sustainable mixed use environment for high growth, technological and knowledge based employment, leisure and retail uses. This work has been commissioned to start to develop a Masterplan which will direct Investment and determine land use allocations, in order to manage the influences and opportunities that will impact on the Park's development, and release its future potential.

Historical Context

1.5 Trafford Park is one of the region's most important commercial and industrial assets. Its history as an employment centre dates back to the late 1900s when it became the world's first industrial park following the early period of industrialisation and opening of the Manchester Ship Canal. A summary of the Park's history is provided below, supported by maps showing land use in 1894, 1927 and 1956.

Trafford Park 1894

See Figure 1.1 - 'Trafford Park in 1894' over page

1.6 In 1894 Trafford Park was a rural estate with a wooded deer-park. There were several wooded areas, the largest two being; Warren Wood and Long Wood. There were also several Moss areas including Trafford Moss. The area housed several small farms predominantly to the southwest of the area below the Bridgewater Canal. There were very few residential dwellings in the area that were not connected to farms. To meet the needs of the residents in the area there was one church, St Catharine's Church located at the junction of the Bridgewater Canal and the Manchester Ship Canal. To the north of the Manchester Ship Canal there are a few residential areas including Barton upon Irwell, intertwined with some farmland.

1.7 Access to the area is provided by a road to the west, which runs from Croft Bank up into Bromyhurst and Dimplington and to the east that runs from Taylor's bridge through Hatton's Wood. The opening of the railway in 1873 ignited the change of the area, increasing the infrastructure links to the area and dramatically increasing the population in the whole Trafford Borough. Although these changes had little to no effect on the Trafford Park area, the completion of the Manchester Ship Canal in 1894 sparked the transformation of the area and was the beginning of an economic calling for the area.

A financier from Derbyshire, Ernest Terah Hooley was quick to pick up on the economic potential of the land adjacent to the new ship canal and acquired the land for an industrial estate, paying £360, 000 for the land in 1896. Although he had initial difficulties with financing the area he developed a partnership with the General Manager of the ship canal, Marshall Stevens. Together they realised the economic potential of the area and in August 1896 Trafford Park Estates Ltd was registered, making this the first planned industrial estate in the world. The canal made the area suitable for import of raw materials and export of mercantile goods directly to the River Mersey and beyond.

Table 1.1 Trafford Park's Early Years - Key Points

- During the mid 19th Century Trafford Park was a rural estate with a wooded deer-park;
- It was once home to the De Trafford Family, who moved out of the area between 1672 and 1720;
- The introduction of various transport systems in the 18th and 19th centuries began to transform Trafford from a rural to an urban society;
- The opening of the railway in 1873 ignited the change of the area, increasing the infrastructure links to the area and dramatically increasing the population in the whole Trafford Borough;
- The Trafford Park area remained relatively underdeveloped despite the development of the railway and in 1894 it still had the presence of a rural area;
- Completion of the Manchester Ship Canal in 1894 sparked the transformation of the area, changing the economic potential of the area;
- Ernest Terah Hooley, a financier from Risley Hall, Derbyshire, was fast to spot this new business opportunity and decided to acquire the land for an industrial estate; he worked together with the general manager of the ship canal, Marshall Stevens, and he brought the land for £360, 000 in August 1896;; and
- Trafford Park **became** the first planned industrial estate in the world.

Trafford Park 1927

See Figure 1.2 - 'Trafford Park in 1927' over page

1.8 The changes over the next 33 years were considerable; the area had been transformed from a woodland estate to an industrial estate that was flourishing. By 1914 Manchester had become the 3rd-ranked port in Britain, and by far the largest inland port, and so the estate became extremely popular with companies that had to transport heavy or bulky goods due to the excellent location with the Manchester Ship Canal and the links this had with several docks. The area became home to electrical, mechanical and constructional engineering companies, flour mills, timber works and specialist firms, such as a company which rejuvenated rubber tyres. It became a food-processing centre and regional food distribution centre predominantly because of the Manchester Ship Canal. The Manchester and Liverpool Transport Company took a site, as did the cable manufacturer W. T. Glover. In 1899 the American entrepreneur and engineer George Westinghouse acquired a site to set up British Westinghouse, which later became Metropolitan Vickers (Metrovick). Westinghouse also built a 'village' for the workforce near to the factory, as Trafford Park lacked housing. It

was based on the American grid system, with streets and avenues identified by numbers rather than names. Over 700 dwellings were built, and shops and a school were added later. Much of this still remains today and is still referred to as 'The Village'.

1.9 The development began centred around the number nine dock area of the Manchester Ship Canal, with several new factories developing, and then spanning westwards across the Trafford Park site. In 1910 the newly named Manchester United Football Club had their new ground built on the eastern edge of the Trafford Park site. Designed by architect Archibald Leitch the stadium became an attraction for many thousands to frequently visit over the next few decades, which has now increased to many hundreds of thousands. Shortly after this in 1911 Manchester's first Aerodrome was built in Trafford Park and the American car manufacturer Ford opened a factory in the area and three years after this, introduced its pioneering assembly line production methods to the factory.

1.10 The First World War had a plethora of effects on Trafford Park. Initially the area flourished as it was extensively utilised for munitions work. However by the end of 1914 a third of the skilled work force had been lost due to signing up to the army. The situation became so bad that the war office started to refuse entry to factory workers. After the war the area suffered employment losses during the economic decline of the 1920s, however new factories continued to open and the area came out of the economic decline relatively unscathed.

Table 1.2 Trafford Park Early 20th Century - Key Points

- The area had been transformed from a woodland estate to an industrial estate that was flourishing.
- Trafford Park became extremely popular with companies that had to transport heavy or bulky goods, or needed good links with North America.
- The Manchester and Liverpool Transport Company took a site, as did the cable manufacturer W. T. Glover. In 1899 the American entrepreneur and engineer George Westinghouse acquired a site to set up British Westinghouse, which later became Metropolitan Vickers (Metrovick).
- Westinghouse also built a 'village' for the workforce near to the factory, as Trafford Park lacked housing.
- Over 700 dwellings were built, and shops and a school were added later.
- The development began centred around the number nine dock area of the Manchester Ship Canal, with several new factories developing.
- In 1910 Manchester United's football ground was built in the Eastern part of Trafford Park, designed by Architect Archibald Leitch.
- In 1911 the American car manufacturer Ford opened a factory creating many jobs.
- The industrial area suffered mixed changes during the 1st World War
- Up until 1914 the estate expanded rapidly as the area was used extensively with munitions work.
- However by the end of 1914 a 1/3 of the labourers had signed up to fight so the labour force was depleting rapidly.
- The area suffered during the economic decline of the 1920's and 30's however new factories continued to open and the area came out of it on top.

Trafford Park 1956

See Figure 1.3 - 'Trafford Park in 1956' over page

1.11 In the next 30 years the area continued to expand and develop even further. More factories were choosing to locate to the area to due to its excellent location and transport links. The infrastructure of the area had improved dramatically to cope with the increased traffic and goods passing thorough the area, with more defined roundabouts where small junctions used to be to help facilitate the smooth movement of a large amount of traffic in the area. From the air Trafford Park would be unrecognisable as the wooded parkland which covered the area 60 years previously.

1.12 During the Second World War Trafford Park was largely used for the war effort due to the ease of turning the factories into producing war materials. The Metrovick factory was rapidly adapted to make munitions. The Avro Manchester heavy bomber was produced here as were the Rolls-Royce Merlin engines used to power both the Spitfire and the Lancaster. As a result the area was extensively bombed during the Second World War, particularly that which occurred in the Manchester Blitz on the night of 23 December 1940: the Metropolitan-Vickers aircraft factory in Mosley Road was badly damaged, with the loss of 13 Avro Manchester bombers in final assembly. Trafford Hall was also severely damaged, and it was demolished shortly after the war ended.

1.13 During the Second World War, employment in Trafford Park rose from 50,000 to 75,000. Employment also held up well in the 1940s and 1950s as the factories began to re-establish their own products after the war effort was over, to boost the economy of the country after the war. However this did not last that long and by the 1960s the area began to suffer and industry declined.

Table 1.3 Trafford Park Mid 20th Century - Key Points

- By 1956 the industrial estate had developed even further.
- The factories had increased in size and number.
- The infrastructure around the area had improved dramatically over the past 30 years to cope with the increase of traffic through the area.
- During the Second World War Trafford Park was largely turned over to the production of war materials including the Rolls-Royce Engine used to power the Spitfire and the Lancaster.
- The area was badly affected during the war due to extensive bombing, particularly during the Manchester Blitz of December 1940.
- Due to the economic and productivity importance of the area by the end of the war in 1945 the area employed approximately 75 000 workers, which was the peak number employed on the site.
- Employment continued to flourish to the late 1950s.

Trafford Park 1960s to the Early 21st Century

See Figure 1.4 - 'Trafford Park in 1960s to the Early 21st Century' over page

1.14 Once into the 1960's Trafford Park began to decline, employment in the area suffered as factories closed and relocated to better suited premises. As the larger properties moved out the cycle of decline was set in motion and the area became more neglected and smaller properties also moved out. In 1971 Stretford Council responded to the decline by setting up

the Trafford Park Industrial Council (TRAFIC), which was open to any firm in Trafford Park. One of TRAFIC's early initiatives was to encourage businesses in the Park to address its general air of decay, by improving their own areas through landscaping and other environmental improvements.

1.15 Later in 1979, the government asked the Trafford and Salford local authorities if they wanted to become part of the Enterprise Zones experiment. Local support for the idea was strong, and the Enterprise Zone came into effect in August 1981. It was seen as a mixed blessing because while existing companies expanded, few new companies moved to Trafford Park. To deal with this problem the Trafford Park Development Corporation (TPDC) was set up in 1987 to promote the area and encourage redevelopment. During the 10-year life of the Development Corporation employment in Trafford Park grew from 25,000 to 46,000, with 1,000 companies attracted, and £1.759 billion of private sector invested.

1.16 Trafford Park is now used by light engineering firms and retailers. One of the major boosts to the area was the opening of the Trafford Shopping Centre in 1998. This almost 1.5m sq ft site was the centre of a contentious issue and the planning decision was ultimately decided by the House of Lords. This redeveloped the whole of the Dimplington area and improved the infrastructure of this site to many other parts of Manchester. A new bus route, the 250 was also created, enabling access to the area via public transport. The Centre has subsequently been extended, with the Barton Square development.

1.17 The area now is not only home to a large industrial estate, but also the Imperial War Museum North, Trafford Ecological Park and an expanded Manchester United Football Stadium with a football museum and banqueting suite. The area around the Trafford Centre has seen the development of a new leisure offer with the development of a number of facilities, including the Chillfactor - an indoor all-year snowsports facility - a David Lloyd Leisure facility, the JJB Soccerdome and Playgolf, a state-of-the-art golf driving range.

Study Context and Masterplan Objectives

1.18 As detailed above, Trafford Park has constantly evolved for over a century in order to respond to changing business and industrial requirements. Change has been particularly rapid at the fringe of the Park over the past few decades with the emergence of an office sector, leisure and retail facilities and the MediaCity project in particular. The Park has not seen a holistic Masterplan for some time. Given the changing nature of the local, regional and global economy and the role which Trafford Park could potentially play in enabling the City Region to meet its full potential going forward, it is a timely point to review the role of the Park and establish a shared vision and framework to guide its future development. It is from this context that partners have commissioned the development of a Masterplan for Trafford Park.

1.19 The commission will be undertaken in three phases:-

- Stage 1 - Baseline Report, Outline Framework and Innovative Vision for Trafford Park
- Stage 2 - Production of the Trafford Park Masterplan; and
- Stage 3 - Implementation Strategy

1.20 The principal aims of the Masterplan are as follows:

- To develop a clear vision for Trafford Park, which has the support of key stakeholders and partners;
- To provide clear guidance to facilitate the sustainable and high quality transformation of the Park in line with the key strategic objectives outlined below; and
- To prepare a robust delivery strategy with opportunities / projects that can be phased and realised within the overall vision.

1.21 The commission also has eight strategic objectives:-

- To realise the full economic potential of Trafford Park as the major employment site, not only for the city region but in the North West, by supporting the regeneration of outdated uses to support the Park's transformation;
- To develop a high quality physical environment in order to enhance and grow relevant existing businesses and to attract key growth sectors industries in particular: Financial & Professional Services; ICT / Digital New Media; Advanced Manufacturing; Energy and Environmental Technologies; Retail; and Tourism and Leisure;
- To enhance the waterside environment by linking into the Media City UK and Irwell City Park;
- To expand and grow the digital new media, creative industries and tourism sectors;
- To enhance public transport, walking and cycling access to the sites through the implementation of a Trafford Park Integrated Transport Scheme;
- To improve strategic transport connections particularly along the Ship Canal Corridor to Carrington;
- To work with higher education institutions to strengthen the area's knowledge and research based; and
- To explore the potential to develop an environmental technology campus.

1.22 Finally, there are a number of guiding principles for the Masterplan as follows:

- Partnership and collaborative working – all sectors, public, private, community and voluntary, need to be actively engaged in order that their expertise, knowledge and enthusiasm for Trafford Park is used to add value to the process and collective ownership of the strategy;
- Sustainability – the masterplan must demonstrate principles of sustainability, including the efficient use of land and resources. The proposals must be sustainable and viable both in economic and environmental terms;
- High quality design – the masterplan must articulate how a commitment to high quality design is fundamental to the approach and the Transformation of Trafford Park;
- Engagement - committed to securing the ownership, endorsement and continued involvement of all stakeholders and partners in the masterplan and its implementation; and
- To ensure all proposals offer locally generated training and employment opportunities.

1.23 Whilst the final planning status of the Masterplan is to be confirmed (see chapter 2), the document will help to direct investment in the Park through setting out a collective strategy and strong direction.

Study Area

1.24 An important element of this Masterplan involves considering the influence and impact of major developments which have occurred or are planned at the periphery of Trafford Park. Consequently the study area for this research covers a slightly wider geographical area than UDP definitions of Trafford Park as set out in figure 1.5 below.

See Figure 1.5 - 'Study Area' over page

1.25 Administrative boundaries do not directly match this study area. Consequently, some of the data provided within this report for Trafford Park covers an area which most closely fits the study area, incorporating 3 Super Output Areas, 5 Census Output Areas, or the wards of Davyhulme East and Park. Where data is provided within the report, its geographical coverage is clearly stated. Finally, in certain instances some data sources are only available for Trafford as a whole.

Baseline Report Objectives and Structure

1.26 This report forms part of the first Phase of the Masterplan and provides the evidence base required to support the development an outline vision and framework for the Park. It includes an analysis of the planning and regeneration context, urban design headlines, key transport issues and property market analysis as well as an existing and future market demand analysis and assessment of business needs and aspirations.

1.27 This baseline report has been developed using a mixture of desk based research and analysis; site visits; consultation with key partners, landowners and occupiers on the Park; and a survey of nearly 1,000 businesses located on Trafford Park. The report is structured as follows:

- Chapter 2 Regeneration and Planning Policy Review - this sets out the strategic context for the study, outlining the implications from a review of planning and economic development strategy as well as providing a summary of major development on or adjacent to the Park;
- Chapter 3 Economic Activity on the Park - this sets out an analysis of economic activity on the Park as well as past trends and future forecasts relating to businesses and employment by sector;
- Chapter 4 Land Ownerships / Strategic Sites - this section highlights the main property ownerships on the Park as well as highlighting key opportunity areas for future development;
- Chapter 5 Spatial and Urban Design Analysis - this sets out the key headlines with regards to a series of urban design issues including land use activities, landmarks, views and vistas, character areas, public realm and access;
- Chapter 6 Transport, Movement and Accessibility Appraisal - this summarises key transport headlines, including strategic transport links, highways, pedestrian/cycle linkages, key approaches and gateways, accessibility and travel to work patterns;
- Chapter 7 Existing and Future Market Demand Analysis - this sets out an analysis of the Trafford Park property market including rental values, investment values, vacancies and comparator analysis;
- Chapter 8 Skills Assessment - This provides an analysis of the skills and make up of the Trafford Park labour market;
- Chapter 9 Business Survey - this summarises the findings of the business survey, making key conclusions relating to business needs and aspirations on the Park;
- Chapter 10 Summary and Implications - this summarises the key findings from the baseline report and its implications for the Masterplan, as well as setting out the next steps to complete Phase 1 of the work.

1.28 A series of appendices are also provided, including the survey questionnaire, list of consultees and other supporting information.

1.29 The findings from this baseline report will lead to the development of an outline vision and framework for the Park, contained in a separate report, which will complete phase 1 of the Masterplan and inform its future phases.

2 Regeneration and Planning Policy Review

Introduction

2.1 As Europe's largest industrial park containing over 1,400 companies and employing a workforce of 35,000, the future development of Trafford Park is likely to be of significance on a local, sub-regional, regional and even national scale.

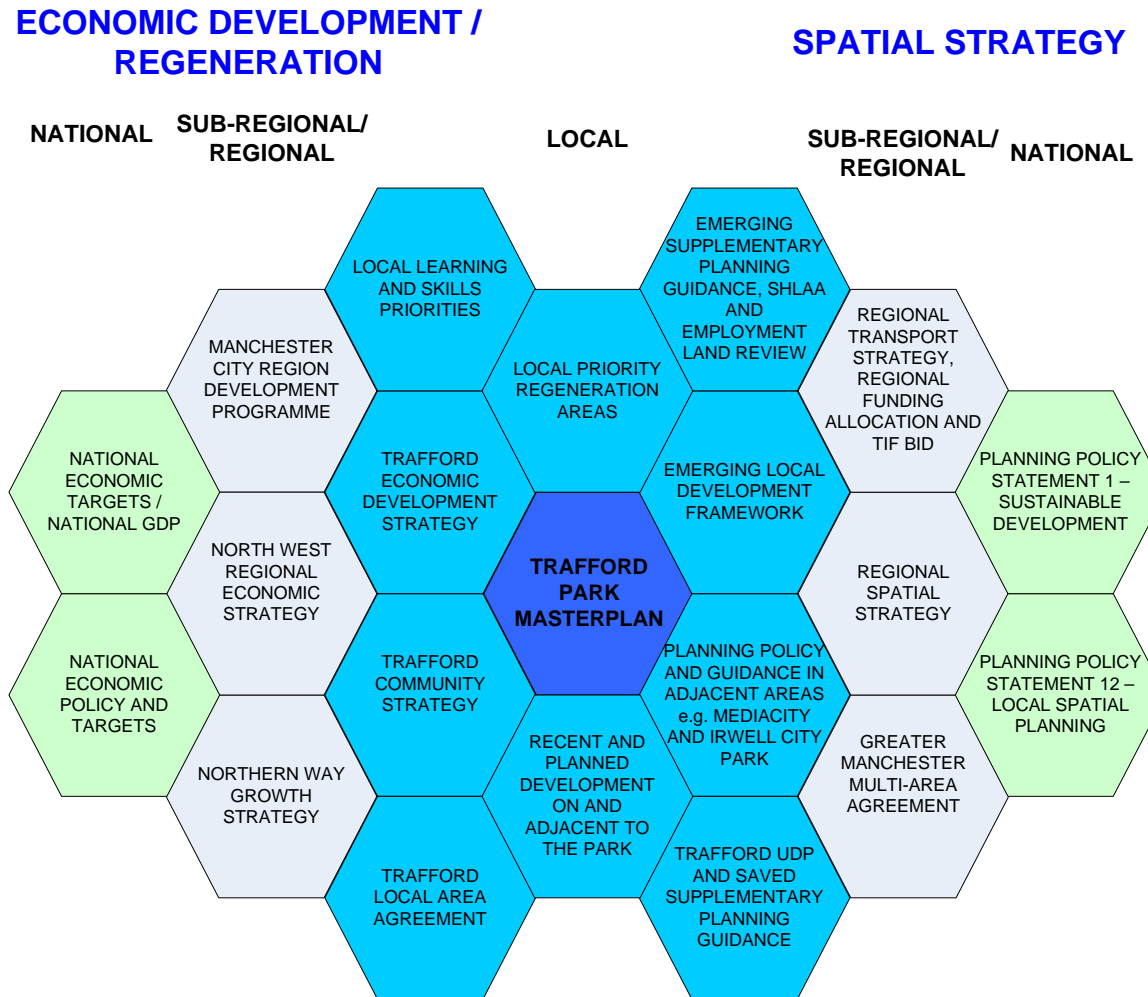
2.2 In order to realise the future development potential of Trafford Park it is essential that economic development and spatial policy are aligned and developed with a through appreciation of market and commercial drivers. It is also important that development proposals are closely aligned with city-region and regional economic priorities as well as future major development activities adjacent to the Park, in particular MediaCity, Irwell City Park and local leisure and retail developments. This will help to increase the Park's competitive advantage and ensure maximum local and sub-regional benefit. These strategic linkages are summarised in figure 2.1 overleaf.

2.3 This section of the report considers:

- The key policy influences likely to impact on the future development of Trafford Park, taking into account planning, regeneration and transport policy; and
- A summary of the regeneration / development activity both planned and underway for Trafford Park and the local area in order to highlight the potential links which can be made

2.4 It has mainly been a desktop review exercise, complemented by consultations with a range of strategic partners (see Annex 1).

FIGURE 2.1 TRAFFORD PARK MASTERPLAN STRATEGIC LINKAGES



National Policy

Planning Policy Statements

2.5 Development proposed at Trafford Park will need to reflect Planning Policy Statements set at a national scale. This will be achieved through alignment with local and regional policy which will themselves reflect such Planning Policy Statements. In particular, Trafford's Local Development Framework will reflect the issues set out in PPS 12: Local Spatial Planning.

2.6 It is however particularly important to consider the priorities of PPS1 - delivering sustainable development - given the focus on facilitating the sustainable and high quality transformation of Trafford Park. Key priorities set out within PPS1 are

- Sustainable economic development;
- Social cohesion and inclusion;
- The protection and enhancement of the environment; the prudent use of natural resources;
- Good design; and
- Effective community involvement.

2.7 These reflect priorities which should be factored into the development of a Masterplan for the Park. Also of particular relevance are the following key themes:

- Recognising the potential social and environmental benefits of economic development;
- Assessing the wider sub-regional, regional or national benefits of economic development against any adverse local impacts;
- Ensuring that suitable locations for specific sectors are available so that the economy can prosper;
- Providing for improved productivity, choice and competition;
- Recognising that all local economies are subject to change;
- Actively promoting and facilitating good quality development which is sustainable and consistent with local plans;
- Ensuring that good quality housing supports economic development and minimises travel to work;
- Providing adequate infrastructure and services to support new and existing economic development and housing;
- Ensuring that plans take into account regional and local economic and housing strategies; and
- Identifying opportunities for future investment to deliver economic objectives.

National Economic Policy

2.8 The core aims of the Government's financial and economic policy are to raise the rate of sustainable growth; achieve rising prosperity; deliver a better quality of life through economic and employment opportunities for all. Some of the key recent national economic policy areas¹ can be summarised as follows:

- Increasing the productivity of the national economy through the delivery of productivity growth. This has fed down to a sub-national level with a greater emphasis on productivity in regional development agencies and narrowing the gap in growth rates between regions;
- Strengthening competition and encouraging innovation within firms and the production of better quality goods;
- Investing to improve the UK's stock of physical capital in terms of buildings and infrastructure in all sectors;
- Encouraging enterprise alongside productivity growth and high and stable levels of employment in order to deliver improved long term economic performance and rising living standards.
- Supporting science and innovation to develop and encourage new ideas, technologies and working practices;
- Delivering the right quantity and quality of skilled labour to support economic growth and increased productivity;
- Promoting growth in financial services and fairness, competitiveness and efficiency in the sector;
- Tackling global economic challenges, promoting the UK economy abroad and pursuing increased productivity and efficiency in the EU;
- Encouraging collaboration across the public and private sectors via Public Private Partnerships to deliver economic policies, services and infrastructure;
- Delivering a modern and effective framework for the planning, control and reporting of public spending; and
- Pursuing full employment and creating employment opportunities for all;

2.9 Many of the above themes could also be appropriate goals for Trafford Park, particularly in terms of increasing the productivity of the Park, encouraging innovation, public and private sector collaboration, employment opportunities for all, improving skills and investing in infrastructure to support economic growth.

2.10 There has also been an emerging emphasis on moving towards a low carbon economy, which balances the delivery of economic growth with minimising environmental impact through the reduction of carbon emissions and development of low carbon

¹ HM Treasury Policy Areas - <http://www.hm-treasury.gov.uk>

technologies. This should be a key consideration in the development of proposals for the Park.

Regional / Sub-Regional Policy

2.11 Given the size of Trafford Park, its business base and its national and international reputation, plans and proposals developed for the Park are likely to be of a sub-regional and regional importance. The principal documents which set out key sub-regional and regional planning and economic development priorities are summarised in this section.

North West Regional Spatial Strategy

2.12 The submitted draft Regional Spatial Strategy (RSS) for the North West provides the planning framework for the physical development of the region over the period to 2026. The RSS was subject to the Examination in Public and subsequent Panel Inspectors Report and is currently undergoing a partial review. It will be important to factor in the implications for Trafford Park once the North West RSS is approved later in 2008.

2.13 Trafford Park is classed as part of the inner area of the City Region, surrounding the regional centre (see figure 2.2). The regional centre is classed as Salford University, Salford Quays, Trafford Wharfside and Pomona Docks.

2.14 Policy MCR2 sets out policy for the Regional Centre and Inner Areas of the Manchester City Region (see figure 2.3 overleaf). It cites the Regional Centre is the primary economic driver and the primary focus for business, retail, leisure, cultural and tourism development in the city region. The expansion of the knowledge economy is a particular priority for the City Region. Plans and strategies will provide for 'local employment' within the Inner areas in accordance with Policy W3 (the supply of sub-regional and local employment land). The term 'local employment' is however not defined. The Trafford Centre is recognised as an important retail facility (policy W5) but the RSS states that it is not appropriate to encourage its expansion in the future. It is also not classed as an established town or district centre within the Trafford UDP, rather as an out-of-centre development. The Inner Areas of the City Region, with the exception of Trafford Park, are classed as the first priority for residential development within the City Region.

2.15 The RSS is a non site-specific document, and therefore Trafford Park is not referenced directly. However the RSS Panel Report contains some discussion regarding the inclusion of Trafford Park within Policy RDF1 (first priority for growth and development) and whether it should be added, but it was recommended that ultimately the area will need to be defined in Local Development Documents. Therefore the boundary of the Regional Centre remains relatively tightly drawn. The definition of Trafford Park as being outside of the Regional Centre within the RSS will have an impact on the scale of commercial and retail development permitted on the Park.

See Figure 2.2 - 'Strategic Context Plan' over page

Figure 2.3 Draft RSS Policy MCR2

Policy MCR2 – Regional Centre²⁰² and Inner Areas²⁰³ of the Manchester City Region

Plans and strategies will ensure that the Regional Centre of the Manchester City Region continues to develop as the primary economic driver, providing the main focus for retail, leisure, cultural and tourism development in the City Region.

Within the 'Arc of Opportunity'²⁰⁴ part of the Regional Centre, proposals and schemes should focus on the major expansion of employment in knowledge-based industries.

Proposals and schemes for residential development in the Regional Centre will be acceptable where:

- It is part of mixed-use employment schemes, comprising a good range of sizes, types, and tenures and affordability;
- Contributes towards the vitality and viability of the Regional Centre; and
- Will not be of a scale that is detrimental to other housing markets, including the Housing Market Renewal initiatives in Manchester, Oldham, Rochdale and Salford²⁰⁵.

The Inner Areas of the Manchester City Region, with the exception of Trafford Park, will be the first priority for residential development within the City Region to secure a significant increase in the population of these areas, to support major regeneration activity, the improvement of community facilities and the creation of sustainable communities.

The emphasis will be on providing a good range of high quality housing (in terms of size, type, tenure and affordability) with a high quality environment, and accessible local facilities and employment opportunities.

Plans and strategies will provide for local employment within the Inner Areas in accord with Policy W3.

Source: the Draft Submitted RSS for North West England 2006

North West Regional Economic Strategy

2.16 The North West Regional Development Agency is the lead body on the economic development and regeneration of the region, with priority areas of work involving business, skills and education, people and jobs, infrastructure and quality of life. Given the strategic

importance of Trafford Park to the regional economy, the Agency is a key partner in the development of the Trafford Park Masterplan.

2.17 The North West Regional Economic Strategy (RES) is the Agency's key strategic document. It sets out a twenty year economic strategy and actions for the region, based around the development of key growth sectors and strategic employment sites, with 100 transformational actions across 3 priority themes:

- Improving productivity and growing the North West's market;
- Creating the conditions for sustainable growth; and
- Growing the size and capability of the workforce.

2.18 The document sets out 6 key priority sectors for the region, many of which already currently have a presence on or adjacent to the Park:

- Biomedical, including biotechnology, pharmaceuticals, medical devices and clinical research;
- Energy and environmental technologies, including nuclear power generation and research, sustainable energy technologies and environmental services;
- Advanced engineering and materials, including chemical manufacturing, aerospace production, automotive manufacturers and advanced flexible materials / textile industries;
- Food and drink, including food manufacturing enterprises and retailing;
- Digital and creative industries, including film, TV and production companies as well as ICT, multimedia and telecommunications; and
- Business and professional services, including finance, banking, venture capital and corporate finance.

2.19 The RES involves 122 recommended actions across the Agency's priority work areas, though none of these directly reference Trafford Park. A significant number of these are of relevance to the Park however, in particular those relating to regional sectors, innovation, international competitiveness, ICT, skills and education, worklessness and improving and better managing the road and rail infrastructure. Actions 80-84 relating to land use and delivering high quality employment sites has a direct relevance to Trafford Park, in particular action 82 'to develop a portfolio of sub-regionally important employment sites'. Also Action 9 involves developing plans to exploit the opportunities for the region from the creation of a Media Enterprise Zone linked to the BBC relocation.

2.20 The document also identifies 25 priority regional employment sites, which include a variety of new business parks, science and enterprise centres and industrial / distribution parks across the region. A wide-ranging review of strategic employment sites is also currently being undertaken by the Agency. The emergence of new sites such as Omega in Warrington

and Kingsway in Rochdale potentially provides greater competition for Trafford Park than previously. When compared with many other major employment sites in the region, Trafford Park benefits from its sustainable location in close proximity to the strategic motorway network as well as Salford City Centre, Manchester City Centre and densely populated residential areas towards the core of the Greater Manchester conurbation.

2.21 It will be important within the Masterplan to consider the presence of key growth sectors within Trafford Park and its potential to accommodate these in the future. In addition it will be necessary to clearly define the role of the Park in driving forward the regional economy and its relationship with other key strategic employment sites.

Northern Way Growth Strategy

2.22 The Northern Way is a collaborative growth strategy between the three Northern Regional Development Agencies (RDAs) to bridge the output gap between the North of England and the rest of the UK. It highlights the £30 billion gap in productivity rates between the North of England and the UK average, a result of the following component parts - people not in employment, productivity and market size. The Northern Way Growth Strategy sets out how partners will work together to achieve the following aims:

- Bring more people into employment;
- Strengthen the North's Knowledge Base and Drive Innovation;
- Build a more entrepreneurial North;
- Capture a larger share of Global Trade, particularly in key clusters;
- Meet employer skills needs;
- Improve access to airports, sea ports and create stronger linkages between regions;
- Create truly sustainable communities; and
- Market the north to the world.

2.23 The Northern Way recognises the importance of the Manchester City Region in achieving regional and pan-Northern growth targets, and consequently the presence of a major industrial park such as Trafford Park has a major role to play in addressing the above aims and the component parts of the productivity gap.

Manchester City-Region Development Programme

2.24 The Manchester City-Region concept was developed largely from the move to create the Northern Way. Stakeholders in each of the northern city regions were charged with developing strategies, ideas and programmes to address this economic underperformance and to develop internationally competitive industries and services.

2.25 The Manchester City-Region Development Programme contains a Vision for a 'world class region at the heart of a thriving north which is internationally competing for investment and jobs'. There is a focus on ensuring that:

- All people have the opportunity to benefit;
- There is an excellent quality of life; and
- GVA levels to match the South East.

2.26 In order to achieve this it will be important for the region to deliver a greater proportion of business growth in higher value sectors; higher GVA output; higher entrepreneurship levels; more international HQs; a higher skill base; be less reliant on public services; and have more efficient and accessible transport systems.

2.27 The key priorities for the City Region closely mirror those of the wider region as follows:

- Productivity (governance and business sector accelerators)
- Growing Demand / Markets (internationalisation)
- Growing the Labour Force (worklessness / attracting and retaining talent)
- Creating the Conditions for Sustainable Growth (spatial policy, employment sites, housing, transport, regeneration and city region linkages).

2.28 The document makes reference to the key business sector accelerators, namely:

- Manchester Airport
- Financial and Professional Services
- Life Science Industries
- Creative / Digital / New Media
- Manufacturing; and
- ICT Digital / Communications

2.29 All of these, with the exception of Manchester Airport and Life Science Industries, have either a major current presence or are likely to become important in the near future in and around the Park. With the exception of immediate priorities relating to the BBC relocation to Salford Quays, the Oxford Corridor in Manchester and Manchester Airport, the document is largely non-site specific and focuses on strategic economic priorities. It will be important for the Masterplan to consider these priorities and effectively set out the current and future contribution which Trafford Park is making to the City Regional economy.

Greater Manchester New Growth Point

2.30 As a result of the recently successful Greater Manchester Housing Growth Point bid, average yearly housing requirements for Trafford have increased to 694 per annum to 2016, dropping back to 578 post-2016. This represents a major uplift in the housing growth for the

area than figures set out originally in Draft RSS. Of particular importance to the Masterplan is the potential which this brings for housing growth in the north of the borough particularly in or adjacent to the Regional Centre. Trafford Quays itself, as well as Pomona and Wharfside, are detailed as a potential housing growth point sites. Residential development on these sites is likely to have a major impact on the dynamics of the areas surrounding the Park.

Summary

2.31 Table 2.1 below summarises the key implications for the Masterplan of regional and sub-regional planning policy and economic development strategy.

Table 2.1 Regional and Sub-Regional Policy – Key Implications for the Masterplan

- There is a need, via the Masterplan, to articulate the current and future role and importance of Trafford Park within a local, sub-regional and regional context
- It will be important to engage with NWDA on the Masterplan regarding views on the future role of the Park and any potential Agency investments;
- Manchester Enterprises will also be an important partner in taking forward actions arising from the Masterplan given Trafford Park's sub-regional importance.
- There is a need to consider the Park's potential to address the priorities set out within regional and city-regional economic strategy, particularly in terms of narrowing the region's productivity gap and delivering an internationally competitive economy;
- Consideration should be given to the current presence of and ability to accommodate key RES growth sectors and priority city-region sectors in the future in Trafford Park;
- It will be important to examine other major strategic employment sites both in the region and beyond, examining the impact which they may have on Trafford Park and whether there are lessons to be learnt from newer employment Parks;
- Any development proposed at Trafford Park via the Masterplan should be consistent with the policies in the RSS, in particular those relating to the Regional Centre, Inner Area and Trafford Centre;
- The Masterplan should see to take account of employment land figures for Trafford as well as the drive to increase housing provision on the periphery of the Park; and
- The document should not be developed in isolation as a Trafford Council document, rather it should gain the buy-in of other neighbouring GM authorities, in particular Salford and Manchester, given the influence and reach of Trafford Park.

Local Policy

2.32 Trafford Park is the principal driver of the Trafford economy. Plans and proposals taken forward through the Masterplan need to be consistent with statutory local planning policy and the priorities of the borough's economic development strategy. This section of the report summarises key implications from the adopted Trafford UDP, the emerging Local Development Framework and associated guidance, the Trafford Economic Development Strategy and the LSC's Learning and Skills Priorities for Trafford.

Trafford UDP

2.33 The Trafford UDP (to be superseded by the LDF) contains a full section and 13 policies relating specifically to the guiding principles for development in Trafford Park. It is recognised as a Priority Regeneration Area, and therefore an area for the development and redevelopment of land, the conversion and refurbishment of available buildings, landscaping and other environmental improvements and investment in local transport infrastructure. It is referred to as a 'large strategic employment area' of local, regional and national importance. Continued development and regeneration action in the Park is recognised as being critical to the future economic and community health and well-being of local residents. The Council's vision for the area reflects a previous Action Plan for the Park developed in June 2001 (the Trafford Park Action Plan) as follows:

'To ensure that Trafford Park sustains its role as a leading international business location, as an attractive base for indigenous and inward investment and that mechanisms are in place to ensure that local communities benefit from the economic activity generated'.

2.34 A summary of each of the 13 specific policies is set out in table 2.2 overleaf.

TABLE 2.2 TRAFFORD UDP - TRAFFORD PARK POLICIES

| Policy and Area | Summary of Policy | B1 Use | B2 Use | B8 Use | Housing | Tourism / Leisure | Conservation | Transport |
|--------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|--------|--------|---------|-------------------|--------------|-----------|
| TP1: Trafford Park Core Industrial Area | Development for business, industry, storage and distribution (B1, B2 and B8). | ✓ | ✓ | ✓ | X | X | X | X |
| TP2: Pomona Strategic Development Area | New and replacement development for office accommodation, leisure and tourism and housing. Consideration of sustainable transport access/provision is necessary. | ✓ | X | X | ✓ | ✓ | X | X |
| TP3: Hadfield St Indust. Improvement Area & Empress St Conservation Area | Development for small-scale business, industry and warehousing (B1, B2 and B8) in the improvement area, and office, housing or other development sympathetic to the conservation area. | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | X |
| TP4: Cornbrook Business Park: | Development of offices, business and similar appropriate uses. | ✓ | ✓ | ✓ | X | X | X | X |
| TP5: Wharfside Strategic Area | Development of offices, high-technology and light industrial premises, hotel, tourism and leisure | ✓ | ✓ | ✓ | X | ✓ | X | X |

| Policy and Area | Summary of Policy | B1 Use | B2 Use | B8 Use | Housing | Tourism / Leisure | Conservation | Transport |
|-------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|--------|--------|---------|-------------------|--------------|-----------|
| TP6: The Village Business Park and Centre | Development for small offices and light and general industry or small shops / amenities on Third Avenue that serve the local workforce | ✓ | ✓ | ✓ | X | X | X | X |
| TP7: Electric Park Strategic Site | Development for business, industry, storage and distribution (B1, B2 and B8); | ✓ | ✓ | ✓ | X | X | X | X |
| TP8: Thompson Road Local Strategic Site | Development for business, industry, storage and distribution (B1, B2 and B8); | ✓ | ✓ | ✓ | X | X | X | X |
| TP9: The World Freight Centre | Development for business, storage and distribution | X | ✓ | ✓ | X | X | X | X |
| TP10: The Trafford Park Ecology Park | Only development which relates to the environmental and educational functions of the established Ecology Park | X | X | X | X | ✓ | ✓ | X |
| TP11 - Trafford Park Rail Corridors | Rail routes are safeguarded and development at the following stations will be supported – White City, the Trafford Centre and Wharfside, The village, Mosley Road, Park Way and the Trafford Centre | X | X | X | X | X | X | ✓ |

| Policy and Area | Summary of Policy | B1 Use | B2 Use | B8 Use | Housing | Tourism / Leisure | Conservation | Transport |
|-----------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|--------|--------|--------|---------|-------------------|--------------|-----------|
| TP12: Barton Conservation Area, Industrial Heritage & Interpretation Centre | Development of a visitor and interpretation centre | X | X | X | X | ✓ | ✓ | X |
| TP13 - The Manchester United Stadium Area | Continued use and improvement of the football stadium and associated development and further park and ride facilities. | X | X | X | X | ✓ | X | ✓ |

2.35 Although work is being progressed on Trafford's Local Development Framework (LDF), the UDP remains the Council's adopted Development Plan. Consequently proposals within the Masterplan, particularly any over the short term, need to take into account these policies. Equally however it will be important for the Masterplan to shape and influence emerging planning policy through the LDF process (see later).

Trafford Saved Supplementary Planning Guidance

2.36 All of the Supplementary Planning Guidance (SPG) documents linked to the 'saved' policies and proposals of the adopted Trafford UDP will be retained by the local authority until such time as they are replaced by new LDF documents. Consequently any development proposed on the Park should be consistent with these UDP policies and planning guidance, in particular:

- Planning Policy D3 / PG1 – Planning Guidelines for New Residential Development;
- Planning Policy D4 / PG12 – Industrial Development; and
- Planning Policy ENV 17 / PG30 – Landscape Strategy.

2.37 In addition, the Council has four non-statutory planning guidance documents which guide development in specific areas of the borough. Two of these, the MediaCity and Irwell City Park guidance, are joint documents with Salford City Council and are of particular relevance to this study as they will guide development at the edge of the Park. A summary of these two initiatives are set out later in the chapter. Trafford Park itself is not currently subject to any area specific planning guidance other than proposals set out in the UDP - the final Trafford Park Masterplan will influence future planning policy in the area as set out below.

Trafford Local Development Framework

Local Development Scheme

2.38 The Planning and Compulsory Purchase Act 2004 established the Local Development Framework – a new system for the preparation of spatial development plans for local authorities across the country. Trafford's Local Development Scheme sets out the programme of local development documents that will collectively deliver the Council's spatial planning strategy (the LDF). The most recent programme for Trafford's LDF identifies consultation on Core Strategy Options taking place July-September 2008, the Draft Plan Report to be submitted in March 2009 and a target date for adoption of July 2010. The Local Development Scheme (March 2007) proposes the Trafford LDF should contain the following:

- Core Strategy DPD;
- Partington Area Action Plan DPD;

- Land Use Allocations Plan DPD; and
- Greater Manchester Waste DPD.

2.39 In addition three Supplementary Planning Documents are proposed - Planning Guidelines for House Extensions SPD; Car and Other Vehicle Parking Standards SPD; and Affordable Housing Guidelines SPD.

Status of the Trafford Park Masterplan

2.40 Within the LDS an indication is provided as to Local Development Documents that may be included in a future preparation programme. This includes a Trafford Park Area Action Plan, outlining the following purpose: “To set out updated proposals for the development of the core employment area of Trafford Park consistent with the new spatial planning framework to be set for the Greater Manchester area by RSS for the North West, the RES, the Council’s Core Development Strategy and the Trafford Economic Development Plan”. The brief for this first Phase of the Masterplan makes reference to ultimately producing a Trafford Park Supplementary Planning Document as part of Phase 2. Essentially however the findings from this first Phase of work - in particular the type, scale and location of change proposed and its relationship with the emerging Core Strategy work - will impact upon the final status of the Masterplan.

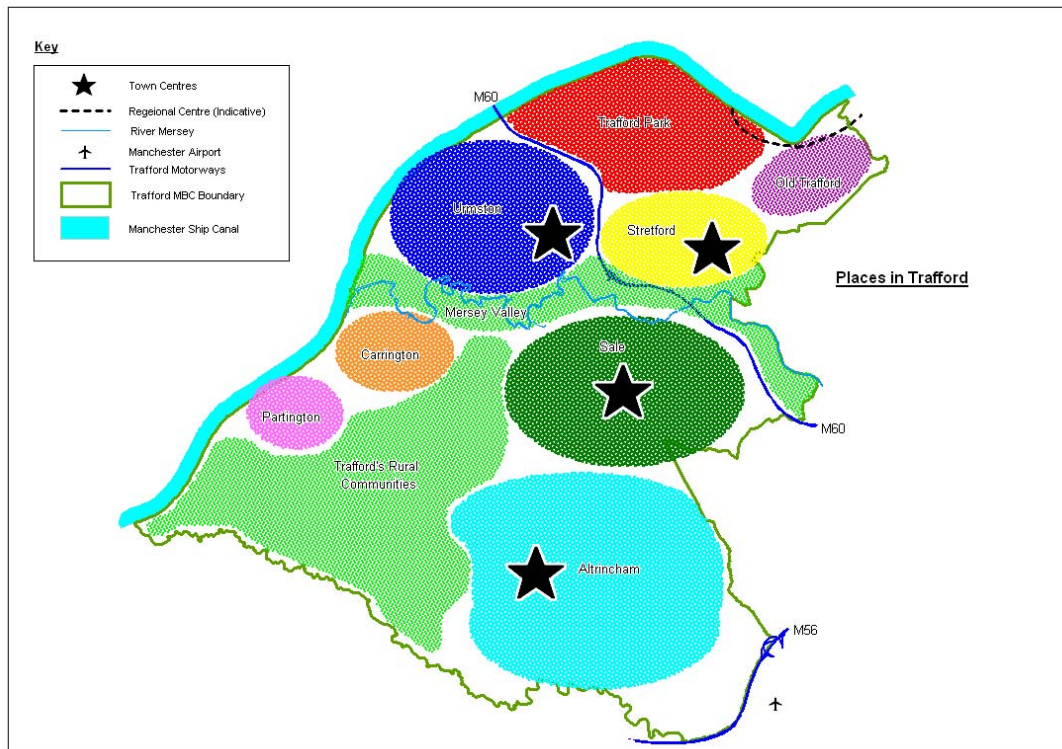
Core Strategy

2.41 The Trafford Core Strategy will be the first Development Plan Document to be produced as part of the Trafford LDF and will include detailed plans relating to economic, social and environmental issues in the borough. This section summarises progress to date in its preparation.

2.42 As part of this process an Issues and Options Paper was produced in July 2007 which set out core issues facing particular ‘places’ within Trafford and the potential options which exist to address them. The selected preferred option will be a highly important consideration for Phase 2 of the Trafford Park Masterplan, not only in terms of better defining key character areas in the Park, but also fundamentally shaping the planning framework that will ultimately support implementation of the Masterplan.

2.43 Trafford is divided into a series of locally distinctive places, one of which was Trafford Park, as set out in the map overleaf.

Figure 2.4 Places in Trafford



Source: Trafford LDF Core Strategy Preferred Options Paper

2.44 The Issues and Options Paper recognises the important role which the Park plays in Trafford and the sub-region, and divides the area into three parts – Wharfside to the east; the core industrial area in the centre; and the western part which surrounds the Trafford Centre. The key issues facing Trafford Park were identified as:

- Its close proximity to pockets of deprivation;
- The opportunities to introduce some sustainable residential development to the Park, in particular the Wharfside area and western edge of the Park;
- The need to define the area's characteristics and role in City Region / RSS terms;
- The potential to extend sustainable mixed use development into the current core industrial zone;
- Opportunities to develop growth sectors such as financial and professional services, ICT/Digital New Media; Tourism; and Energy and Environmental Technologies;
- Addressing public transport issues, improving access and encouraging walking and cycling in the Park;
- Maintaining the Ecology Park located to the North East of Trafford Park;
- The lack of health facilities on the Park; and
- Security issues.

2.45 Three strategic spatial options for the future development of Trafford are set out, namely:

- Focus growth in and adjacent to the Regional Centre and in the remaining Regeneration Areas with restraint elsewhere;
- Focus growth initially across the whole of the north of the borough and secondly within the remaining Regeneration Areas, with restraint elsewhere; and
- Focus growth in the north of the Borough with restraint in the south of the Borough.

2.46 The comments received during early consultation on the Core Strategy Issues and Options Paper have informed the preparation of a Core Strategy Preferred Options Paper. Within this document, Strategic Objective SO3 relates to 'developing the capacity of Trafford Park Core Industrial area as a sub-regional resource providing sustainable long-term employment growth opportunities to support economic regeneration, improved skill levels and development within and beyond the borough'.

2.47 Also of relevance given its proximity to Trafford Park, a separate strategic objective focuses on developing the capacity of Carrington to support the economic and social regeneration and development of Partington. Table 2.1 overleaf sets out the specific vision and objectives for Trafford Park.

2.48 It will be important that the development of the Masterplan considers these objectives, but also that the findings should seek to influence the way in which local planning policy for the area evolves through the Local Development Framework.

2.49 The Paper also sets out 3 spatial options for development. Under all 3 options, the core of Trafford Park would be prioritised for significant employment growth in both traditional and growth industries, although under option 2 this is also the case for Carrington. Each of these options however would result in slightly different spatial outcomes for Trafford Park. These can be summarised in table 2.3 overleaf.

Table 2.3 Vision and Objectives for Trafford Park – Core Strategy Issues and Options Paper

| Trafford Park Vision | Trafford Park Place Objectives |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| To sustain Trafford Park as a regionally significant focus of economic activity serving and supporting the business and employment needs of Trafford and the wider City Region economy and its residents. | <p>To regenerate and develop the core area of Trafford Park as a high quality, competitive, modern day business location;</p> <p>To create the right conditions for significant, mixed business and residential development in line with its role within the City Region;</p> <p>To maximise the economic and residential potential of the area in line with RSS Policy MCR2;</p> <p>To create a vibrant , diverse location for digital and media industries at MediaCity;</p> <p>To consolidate and build upon the key tourist attractions;</p> <p>To improve the transport infrastructure serving the area to enhance accessibility by both public and private transport means; and</p> <p>To promote the re-use or redevelopment of unused, under-used and derelict land in the area.</p> |

2.50 Whilst all three of the options would bring major new residential and employment opportunities to the borough, Option 3 would deliver the highest number of new jobs at the Park as well as the highest density development at Wharfside with a spatial focus on the east of the Park. Option 2 would lead to a greater shift in residential terms towards a major Greenfield site on the western edge of the Park, whilst Option 1 delivers a more even distribution of housing development.

Table 2.4 Spatial Outcomes for Trafford Park – Core Strategy Issues and Options Paper

| Option | Summary of Trafford Park Place Outcomes |
|-------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 - The Inner Area / Selected Regeneration Area Priority Strategy | <p>Housing opportunities at Wharfside (900 units) and Trafford Quays (900 units);</p> <p>Associated education, health and convenience retail facilities to support the above housing development;</p> <p>A stronger business case for Metrolink;</p> <p>50% of the borough's new employment opportunities being created at Trafford Park;</p> <p>Industrial/storage/distribution in core Trafford Park, digital / media in Wharfside and service / retail at Trafford Centre; and</p> <p>Maximising use of waterways, cycling & pedestrian routes.</p> |

Table 2.4 Spatial Outcomes for Trafford Park – Core Strategy Issues and Options Paper

| | |
|----------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2 - The Inner Area / Wider Regeneration Area Priority Strategy | <p>Housing opportunities at Wharfside (750 units) and Trafford Quays (1,000 units);</p> <p>Potential additional community facilities at the Trafford Centre;</p> <p>40% of the borough's new employment opportunities being created at the Park;</p> <p>Improvements to the transport network throughout the Park; and</p> <p>ICT/digital industries at Wharfside.</p> |
| 3 - The Inner Area Priority Strategy | <p>High density residential development, totalling 1,100 units at Wharfside and 700 units at Trafford Quays;</p> <p>60% of new jobs in the borough being created at Trafford Park;</p> <p>Industrial and storage/distribution development at the core Park area and service/retail jobs around the Trafford Centre; and</p> <p>More limited opportunities to make infrastructure improvements throughout the Park.</p> |

2.51 Finally, the paper sets out 11 key strategic sites in the borough, five of which are of relevance to Trafford Park – Pomona (residential led mixed use development, including office and leisure uses); Wharfside (mixed use area incorporating MediaCity and Manchester United; Lancashire County Cricket Club (mixed use development including leisure, residential, education, community and retail); the Trafford Park Core (industrial storage / distribution facilities and public transport improvements; and Trafford Centre Rectangle (mixed commercial, retail and leisure). It will be important for the Masterplan to consider the relationship of each of these strategic sites in taking forward development in Trafford Park. The delivery of these sites represents a changing policy context in the area, with a changing role of the Park and mix of uses within and adjacent to it.

2.52 Consultation on the Core Strategy Preferred Options Paper is being undertaken in July and August 2008. The intention is for an adopted Core Strategy to be in place by the end of 2010.

Trafford Employment Land Review

2.53 The Trafford Employment Land Study forms an important part of the background information which is used in the development of Trafford's LDF, by assessing the future demand for employment land in Trafford, the existing and future supply and suitability of sites, identifying employment areas and sites of key importance and the need for any additional land to be made available.

2.54 Within the Employment Land Review, Trafford Park is recognised as being the largest of three main centres of employment and economic activity in the Borough, the others being Carrington and Broadheath. The Review is currently at a draft stage and due for completion in September 2008. All sites examined as part of this process to date are recommended to be retained as part of the employment land portfolio with redevelopment of brownfield sites being considered the best use of the land. The possible exception to this is Wharfside, which subject to the emerging LDF strategy may have potential for sustainable residential development.

2.55 The Draft report considers the 'Trafford Centre Rectangle' as now being distinct from Trafford Park and questions how much of this land should be lost to residential and mixed use development and how much employment land it will yield and of what type. It will be important to examine the final report in the context of the Masterplan, in particular noting the quantum of employment land in the district, any shortfalls and which sites are being retained for employment use.

Trafford Strategic Housing Land Availability Assessment (SHLAA)

2.56 The Trafford SHLAA is a key component of the LDF evidence base to support the delivery of sufficient housing land across the borough. The aim of the assessment is to identify a supply of sites with housing potential across the borough. Existing employment development sites were included from the initial assessment until the employment Land review is finished. A potential 15 year supply totalling 4,715 units was identified for Trafford Park and Old Trafford. Of particular note is the Trafford Quays site, adjacent to the Park, which is expected to yield circa 2,000 units over this period, Wharfside (500 units), Pomona Docks (1,600 units) and the area surrounding Lancashire County Cricket Club (1,500 units). Whilst the current economic climate with regards to the house-building sector may impact upon demand and the delivery of some of these sites over the short term, there is a clear shift towards the delivery of more residential development around the edges of the Park over the longer term.

2.57 The Draft SHLAA is currently undergoing a period of public consultation and the final document is due to be completed later in 2008. It will be necessary to consider the potential for mixed use development on the fringes of the Park as well as the potential impact of major housing development nearby.

Trafford Strategic Planning Department

2.58 Consultation with key members of Trafford's strategic planning team revealed a series of key considerations for the Masterplan from a strategic planning perspective. In terms of the document itself, the Masterplan should link with the emerging findings and consultation process of the LDF. In light of the findings from the Masterplan, recommendations should

then be made regarding the future status and nature of the final document. The following issues are seen of importance for the study:

- The quality of engagement with and between occupiers and landowners and public private sector needs to be improved;
- There is a need to clearly define the current and potential future contribution and role of Trafford Park to the sub-regional and regional economy;
- Potential recreation and leisure opportunities should be considered but with realism attached to these;
- There is the potential to develop live/work links with the Wharfside, Trafford Quays and Rectangle developments;
- The promotion of good quality mixed use development on key gateways would be welcomed;
- There is a need to find more employment land in Trafford;
- The core of the employment area will be particularly important to consider;
- The skills and business needs assessment should be linked to similar work which has already been undertaken by various agencies; and
- Recruitment, retention and public transport access issues should be explored in more depth with businesses on the Park.

2.59 The Trafford Park Masterplan is of key relevance from both an economic development perspective and from a planning point of view.

Trafford Community Strategy

2.60 The Trafford Partnership brings together the key public sector agencies working within the borough. The work of the partnership is based around the delivery of the Trafford Community Strategy - Trafford 2021: A Blueprint. This document also provides the local vision and context in which the Trafford LDF is being produced. The vision for Trafford includes becoming the 'enterprise capital of the North West' and home to internationally renowned sporting and cultural attractions. The strategy is based around six strategic aims – safety and reassurance; diverse economy; strong communities; positive environmental impact; better homes; and health and improved quality of life for all.

2.61 The strategy includes 43 commitments. Of these, the most relevant to Trafford Park are as follows:

- Improving access, the expansion of the Metrolink and improving the road network;
- Reducing inequalities and improving engagement and participation in working in Trafford;
- Supporting residents from disadvantaged communities to achieve a higher quality of life through employment, training and volunteering;

- Developing the right skills for the economy to address identified skills shortages particularly at NVQ Level 3 and encourage workforce development in growth sectors;
- Secure appropriate investment and environmentally friendly, well designed development in major employment centres, particularly Trafford Park;
- Secure and develop appropriate premises for new and expanding businesses;
- Developing Trafford as the enterprise centre of the North West;
- Ensuring a culture of corporate responsibility is in place across all sectors in Trafford;
- Support local businesses to benefit from a growing economy; and
- Grow business sectors by ensuring that there is the right infrastructure, economic conditions, business support and skills to drive up productivity, wealth and job creation.

2.62 The Community Strategy brings together key priorities for public sector agencies across a range of fields. Similarly, it will be important that proposals for Trafford Park take into account not only economic factors, but issues relating to transport, skills, regeneration and the environment to ensure maximum impact for both the Park and wider area.

Trafford Economic Development Strategy

2.63 This document sits beneath the Community Strategy and provides a single framework to guide activities of the Trafford Economic Alliance, the economic arm of the Trafford Partnership which is the Local Strategic Partnership charged with developing and implementing the Trafford Community Strategy. The strategy offers analysis of the local economy and key drivers, articulates Trafford's economic assets, identify challenges, set out clear priorities and informs the Community Strategy Review.

2.64 The document emphasises that Trafford is a fundamentally important part of the City Region, without which the future growth potential of the City-Region will be severely constrained. Trafford benefits from having a high business density, high GVA per head and a good skills base. It is also a net importer of jobs, home to some key growth sectors and has a good quality of life. Trafford Park itself makes a key contribution to all of these issues, and is a key asset with a major role to play in the sub-regional economy. The document sets out the scope to extend the contribution of the Trafford Economy further.

2.65 The strategy recognises that Trafford Park is one of the largest concentrations of engineering, manufacturing and logistics related employment in Europe. It sets out strategic economic objectives for the borough as follows:

2.66 Addressing 'growing pains' and successfully managing some of its assets, namely:-

- Ensuring a suitable supply of workers in both lower and intermediate skills levels and to support knowledge based economies (more managers, professionals, associates and high level engineering positions);
- Overcoming congestion;
- Balancing the competing demands (houses, industrial, commercial, retail and open space); and
- Addressing the lack of suitable grow-on space.

2.67 Ensuring the wealth and opportunities are shared by all / tackling disadvantage – This involves the following

- Tackling areas of disadvantage around Sale, Partington, Carrington and Old Trafford;
- Un-tapping the resources of these areas in terms of skills and enterprise; and
- Helping to tackle recruitment difficulties and skills shortages.

2.68 Raising profile and recognition – This involves the following:

- Increasing the scope for officers and members to make the case for Trafford with external strategic and delivery partners; and
- Exerting influence over policy and funding decisions.

2.69 The future development of Trafford Park can play a key role in delivering these strategic objectives, in particular via a better and more co-ordinated approach to the future development of the Park and ensuring that the benefits of the Park are felt in areas of disadvantage within the borough. The Masterplan document should be used to help raise the profile of the Park amongst key sub-regional and regional partners and policy makers.

Trafford Local Area Agreement

2.70 Local Area Agreements are new funding arrangements, introduced in 2004, between Central Government and Local Authorities. They are 3-year funding agreements which a focus on fewer priority outcomes and a move towards mainstreaming and consolidation of funding, in return for local authorities being given more freedom and flexibilities to focus on localised needs.

2.71 The second Trafford LAA for the period 2008-2011 was approved in July 2008 and confirmed agreed local improvement targets for the borough over this period. The LAA is the major delivery mechanism for the Community Strategy. The following are the key priorities from the 2008-2011 Trafford LAA:

- Safety and reassurance;
- Strong and diverse economy;
- Strong communities;

- Positive environmental impact;
- Better Homes; and
- Health and improved quality of life for all.

2.72 These priorities are underpinned by the following themes:

- Reducing inequalities;
- Improving access with a particular focus on transport issues;
- Better quality, co-ordination and sharing of information across all partnerships; and
- Promoting volunteering opportunities across all communities.

2.73 A number of these priorities and themes are of relevance to the Trafford Park Masterplan, in particular a strong and diverse economy, positive environmental impact, reducing inequalities and improving access / transport. Proposals within the Masterplan should be developed in conjunction with the local authority to align activities with the priorities of the LAA, in particular giving consideration to the potential contribution which could be made to delivering the following LAA's core indicators:

- NIS 117 - Number of 16-18 year olds who are not in employment, education or training;
- NIS153 - Working age people claiming out of work benefits in the worst performing neighbourhoods;
- NIS 154 - Net additional homes provided;
- NIS 167 - Congestion - average journey time per mile during the morning peak;
- NIS 172 - VAT registered businesses in the area showing growth;
- NIS 174 - Skills gaps in the current workforce reported by employers; and
- NIS 186 - Per capita CO2 emissions in the LA area.

2.74 The Trafford Park Masterplan should also give consideration to the emergence of the Multi-Area Agreement at an AGMA level, particularly given the level of cross-boundary co-operation and sub-regional importance associated with Trafford Park.

The Learning and Skills Council Baseline Report for Trafford

2.75 The LSC Greater Manchester's recent baseline report for Trafford analyses the current supply and demand for skills in the Trafford economy and highlights a number of key learning and skills issues for the borough which must be addressed in order to increase the economic competitiveness of Trafford and take advantage of potential growth sectors in the region. The key positive elements of the report are as follows:

- Trafford has a high proportion of higher skilled residents (Level 3 and above) and a lower proportion with no qualifications;

- The occupational profile of Trafford is weighted towards higher skilled occupations;
- Trafford has low unemployment and economic inactivity rates;
- There has been employment growth in Trafford, in particular within the ICT Digital / Communications Sector, Creative/Digital. New Media Sector and retail;
- Trafford has high levels of GVA growth and enterprise;
- Future economic growth forecasts are strong;
- NEET figures in Trafford are lower than elsewhere in the sub-region; and
- High success rates in FE.

2.76 Whilst all of the above points are positives for the area, it means that the Borough fails to attract some external funding to tackle issues such as deprivation, skills and worklessness when compared with areas where these are more widely prevalent. There are also some specific skills issues to be addressed in the borough as follows:

- Trafford has relatively low levels of apprenticeships;
- The increase in FE success rates for 16-18 year olds is below the GM average;
- The high proportions of people with a learning difficulty / disability and with lower level qualifications;
- There has been a reduction in the participation of individuals aged 19 plus at level 2;
- There is a need to maintain the high level of achievement at NVQ Level 2 and 3; and
- Increasing the representation of Trafford Park residents in specific Train to Gain sector Subject Areas;

2.77 In relation to other areas in Greater Manchester, Trafford generally has a well qualified workforce. However it will be important through the Trafford Park Masterplan, in particular via the business survey, to identify specific skills shortages and issues for employers on the Park and to make recommendations which fit within the learning and skills climate of the area. In particular it will be important to examine whether skills issues in priority regeneration areas in the borough are impacting upon the ability of residents to access jobs at the Park.

Summary

2.78 Table 2.5 overleaf summarises the key implications for the Masterplan of local planning policy and economic development strategy.

Table 2.5 Local Policy – Key Implications for the Masterplan

- Proposals at the Park should contribute to the future economic and community health and well-being of the borough;
- Plans for the Park should take into account adopted UDP planning policy for the 13 sub-areas of Trafford Park, however UDP designations should not constrain thought processes and the Masterplan should seek to influence future planning policy in the area;
- The findings from the Masterplan will ultimately help to determine the final planning policy status of the document – i.e. whether it becomes an Area Action Plan, Masterplan or other supplementary planning guidance;
- Development proposals should take into account saved supplementary planning guidance, in particular relating to new residential development, industrial development and landscape strategy;
- The work should take into account emerging options and objectives for the Park as set out in the Core Strategy Issues and Options Paper;
- It will be important for the Masterplan to consider the most appropriate location and scale of future development and the role and inter-relationships of strategic sites in and adjacent to the Park;
- The wider implications of development at the Park should be taken into account, particularly in terms of addressing strategic objectives of the Community Strategy and issues relating to regeneration, skills and worklessness;
- The Masterplan will help to set out a more co-ordinated long-term approach to the development of the Park; and
- The Masterplan should help to ensure that Trafford Park's profile is raised amongst the sub-regional and regional policy making audience.

Development Context

2.79 This section summarises planning and economic development strategy in the neighbouring authority areas and key recent developments on and adjacent to the Park. Significant changes have occurred at the periphery of Trafford Park over recent years, in particular at Salford Quays, the Trafford Centre and Central Salford as well as Manchester City Centre located just a few miles away. Each of these impact upon on Trafford Park in varying ways, and it will be an important element of the Masterplan to recognise the changing nature of the wider area; to make linkages to new development; more clearly define the role of the Park in a changing regeneration landscape; and help to the Park's role in terms of key current and potential future constituent character areas. The context for the study is summarised in figure 2.2.

Development on the Park

MediaCity / Wharfside

Mediacity

2.80 Salford Quays has undergone significant redevelopment over the past few decades, initially guided by the Salford Quays Development Plan of 1985, which has resulted in a major change to the eastern edge of Trafford Park. This transformation has included the construction of a variety of waterfront commercial, housing, leisure and retail developments. The Quays is now currently a major employment site for Salford, employing over 10,000 people in a variety of financial/professional services, retail, e-commerce, sporting, leisure and retail roles. The MediaCity initiative is the next major regeneration project in the Quays and presents a significant opportunity to deliver economic growth both to Salford and surrounding areas, including Trafford Park.

2.81 The site for MediaCity covers some 220 hectares (including a 14.8 ha Quays Point site at its core), with the aim of ultimately creating 7 million square foot of business, residential and retail floorspace that will create in the region of 15,500 jobs from over 1,000 businesses mainly in the media, arts, entertainment and leisure sectors. The development is lead by developers Peel Holdings Ltd in conjunction with partners from the NWDA, Salford City Council and the Salford URC. It will be anchored by the BBC which is likely to relocate five departments to the Quays by 2011 and will lead to other digital, media and creative industry companies to be established or relocated to the area.

2.82 Whilst Salford Quays is already a well-established destination and business location, the MediaCity development represents a further market change to the area and the potential to bring new business opportunities to the eastern edge of Trafford Park. It will be important for the Masterplan to consider the implications of this development for the future of the Park, particularly in terms of land use at its eastern edge, new opportunities for existing businesses on the Park, traffic and access implications and skills/labour force requirements.

2.83 Non statutory planning guidance to guide development for MediaCity (covering land bounded by Eccles New Road, Trafford Road, Ordsall Lane, Manchester Ship Canal and Trafford Park Road) has been prepared by Salford City Council and Trafford Borough Council. This sets out a set of principles to ensure the appropriate mix of uses and high quality design in new development and will be a material consideration in determining planning applications in the area. The document provides guidance on the mix of uses, urban form, density, massing and public realm in both the Quays Point (core of MediaCity) and wider MediaCity area. High quality new office based employment uses will be encouraged, with an emphasis on media, creative industries, high technology and knowledge based employment. Redevelopment at Quays Point will represent a more urban form than previously seen in the Quays, including a number of taller buildings, with densities reducing within the wider MediaCity area.

Wharfside

2.84 The Trafford Park Masterplan should reflect the influence of MediaCity and consider connections to the Park, although the majority of the MediaCity site itself lies outside of the study area for this Masterplan. The Wharfside area of MediaCity, previously parkland and former industrial land, is under the Trafford's boundary and within the study area. It is also classed as part of the Regional Centre. The Masterplan therefore has greater scope to consider the role and function of this area. It is identified as a key strategic site within Trafford's Core Strategy Preferred Options document, promoting significant mixed business and residential development. The former including high quality office development as part of the regional centre and digital / media industry at the fringe of MediaCity, whilst the latter would likely involve higher density residential development of between 750 and 1,100 units. The land is under multiple ownership, including Peel Holdings and Brixton PLC.

Manchester United Football Club

2.85 Located adjacent to the MediaCity Planning Guidance Area, but within the area defined as the Wharfside Strategic Site in the Core Strategy Preferred Options Report, Old Trafford is the home of Manchester United Football Club, providing a major sporting and leisure asset which plays a key role in the dynamics of the Trafford Park area. The Core Strategy Preferred Options report promotes further enhancements for the 'world-class sporting destination', as well as improving the public and private transport infrastructure which

serves the area. The Trafford UDP also supports the continued use and improvement of the area including associated hospitality, conference, club store and visitor car parks. It also promotes park and ride facilities related to activity at the stadium.

2.86 The presence of the football club is likely to have a continued significant impact on the way in which the eastern end of Trafford Park is used, accessed and developed, particularly in terms of associated hotel, leisure and tourism uses. In addition, Lancashire County Cricket Club is also located close by next to the Old Trafford Metrolink station. This area is promoted as a 'world class' sporting and leisure destination, with future mixed use development including residential, office and community uses planned for the area. Consultation with the Property Manager of the football club revealed that the club themselves view the area around the football ground and spilling over into the Quays and the Cricket Club as having a major leisure / tourism focus going forward and would support further policy to facilitate this, including improved traffic flows, better access, public realm improvements, pedestrian walkways and visitor destinations/facilities in the area.

Pomona

2.87 Located within the regional centre and adjacent to the Manchester Ship Canal, the Pomona Strategic Development Area was identified for business, industry, storage and distribution uses (B1, B2 and B8) within Trafford's UDP. Within the Core Strategy Preferred Options Paper however, Pomona is referenced as a strategic site which is suitable for residential-led mixed use development incorporating high density housing development with office and leisure uses. It is a large former dockside development site next to Pomona Metrolink station. The area has the potential to accommodate up to 1,400 housing units (assuming mainly 1 and 2 bed) and is strategically well located within the regional centre and with good walkways and pedestrian links. Despite its strategic significance however, the site has remained derelict for a number of years.

2.88 In conjunction with the Wharfside area and Trafford Quays (see below), Pomona represents a major opportunity to assist with the regeneration and development of the area's housing stock in particular, potentially improving the area's quality and quantity of provision. It will be important also to consider the range and nature of community provision required to support new major housing developments in the area.

Irwell City Park

2.89 The Irwell City Park concept involves plans to create a new 'urban park' which runs along the Irwell, through Central Salford, Manchester and Trafford and covering an area stretching from the University of Salford down to Salford Quays and the Football Ground. The project involves an 8km access route down the Irwell / Ship Canal corridor and includes 6 'package areas' including a variety of iconic projects. Of most relevance to the Trafford Park

Masterplan are the open space, public realm and bridge / access improvements planned for the Quays area (Clippers Quay in particular) in the 3rd phase of the project. The project is a joint collaboration between Manchester City Council, Salford City Council, Trafford Borough Council and the Central Salford URC. Combined Planning Guidance for the Park was adopted in March 2008 and sets out guidelines and principles for the area, providing a material consideration in determining planning applications in the area.

2.90 Whilst the project mainly involves a continuous riverside cycle / walkway and the high quality design of new public open spaces and infrastructure, there is also a clear focus on making links to exploiting waterside assets for economic benefit, acting as a catalyst for economic growth and attracting investment along the Irwell/Ship Canal corridor. The project is in its early stages, with an application for funding to the NWDA recently made that would fund essential pre-implementation works including design and feasibility assessments, small scale acquisitions, site surveys and marketing.

2.91 It will be important for the Masterplan to consider in detail the implications of this project, in particular with regards to direct interventions that will help to better connect the Quays with the edge of Trafford Park. Development at Clippers Quays more generally could potentially have a huge impact on the local area. It will also be important to consider cycle and pedestrian access to and within Trafford Park and its public realm provision, potentially examining whether a similar concept or elements of the Irwell City Park initiative could be rolled out within the Park eventually.

The Industrial Core

2.92 The majority of recent change and development within Trafford Park has tended to occur at the periphery of the Park, around the Salford Quays area to the east and the Trafford Centre to the west. The industrial core itself has seen less change over recent years. Views from key strategic partners have revealed that the core of the Park is expected to continue as an industrial and distribution centre, with further future change expected around its periphery. An example of this is provided by Brixton (a mainly industrial developer) marketing some of its more peripheral sites (in particular its Wharfside units) whilst seeking to consolidate and enhance its land holdings in the core of the Park.

2.93 As an example of a notable recent major industrial development within the Park, Premier Park is a new industrial / warehouse development located opposite MediaCity on Trafford Park Road. The prestigious development offers units ranging from 4,500 to 41,000 square feet including 24 hour on-site security, energy efficient units and flexible office and warehousing floorspace. This provides an example of the quality, design and nature of facilities which are offered by major new industrial developments. Another major recent development has been the 360,000 sq ft Adidas distribution centre on Westinghouse Road,

whilst the adjoining Avro Park site has been cleared and is ready for large scale development subject to planning consent.

2.94 The Masterplan should seek to consider how best to meet the needs of future industrial development, identifying key strategic sites where appropriate, and the principles which should be applied to such new development within the Park. Chapters 4 and 8 explore in more detail the industrial (and commercial) property market within Trafford Park.

Trafford Centre Rectangle / Trafford Quays

2.95 The western edge of Trafford Park is dominated by the Trafford Centre Rectangle area, classed as a strategic site in the Core Strategy Preferred Options Paper. Within the Paper, mixed commercial, retail and leisure is promoted at the area as well as residential led mixed use development and associated public transport enhancements. It will be important for the Study to assess the potential of the leisure and retail sector and offices to be developed further in the area and the impact which this may have on future plans for the Park.

2.96 The Trafford Quays site, located alongside the Manchester Ship canal next to the Trafford Centre, also has the potential to have a major influence on the western edge of the Park. This is a derelict site of more than 20 hectares, last used around 15 years ago. It is seen within the Core Strategy Preferred Options Paper as a major medium-long term housing development capable of delivering a large amount of homes (3,000 in total including between 700-1,000 over the medium term). The UDP originally cited the area as complementing and reinforcing the economic regeneration aspirations for Trafford Park by developing non food bulky goods retail warehousing; modernising existing businesses, industry, storage and distribution uses; and the further development of sports and leisure uses at the Regional Sports Centre. The development of the Trafford Quays site would have significant implications for community and transport infrastructure in the area.

2.97 The Trafford Centre itself, owned by Peel Holdings Ltd, opened in 1998 and contains circa 1.5 million square foot retail space attracting 30 million visitors annually demonstrating the scale of the development. The retail park expanded in March 2008 when Barton Square opened, an extension catering for the homeware market. The area is also home to a number of leisure facilities, including a golf driving range, six a side football centre and a major new indoor ski slope. There is also some office development such as the Venus Building, which is a contemporary 8,500 sq m office building located on the Trafford Boulevard.

2.98 Planning permission was granted in 2006 for the construction of a canal linking the Trafford Centre to the Manchester Ship Canal. In addition, there have been long-standing plans for the Metrolink to reach the Centre although this as yet is still to be finalised. Access to and from this western area of the Park will be a particular consideration for the Masterplan,

particularly if major residential development and further enhancements of the area's leisure, retail and commercial offer are delivered.

Development Close to the Park

Barton / Port Salford

2.99 Barton / Port Salford has been identified as a strategic site by NWDA within the Regional Economic strategy. The development of Port Salford has been earmarked as a major water, road and rail freight interchange with the opportunity to create in excess of 2,000 jobs. At the time of writing, the planning application is under discussion between Peel Holdings and the Highways Agency. In addition, part of Barton is the chosen site for a new City of Salford Sports Stadium, to be used primarily by the Salford Reds Rugby League Club and also including hotel, restaurant, conference and retail facilities. Clearance has begun on the site. Again, both of these developments have the potential to have a major impact on the western edge of the Park, particularly in terms of expanding the area of economic activity and leisure facilities. Both developments have associated transport implications.

Old Trafford Masterplan

2.100 The Old Trafford area of Trafford has traditionally been, and continues to be, an important source of labour for Trafford Park. Indeed much of the residential offer in Old Trafford was originally developed specifically as housing for the workers of Trafford Park during the Edwardian and Victorian periods. A Masterplan covering physical, social, economic and environmental land use issues within the Old Trafford neighbourhood has recently been commissioned by the Trafford Housing Trust, in conjunction with Trafford MBC. This study will lead to the development of an agreed over-arching vision for the future development of the Old Trafford neighbourhood, with underlying development objectives, a set of recommended interventions for the area and attached implementation plan.

2.101 It will be important that links, where appropriate, are made between the two commissions given the historic and continued linkages between the two areas. There is a clear need for instance to ensure that any new development and subsequent employment opportunities generated at Trafford Park is supported by a quality housing offer nearby. In addition, it will be important to consider the potential which new development at the Park over the long term has to address issues of worklessness, economic inactivity and social exclusion in Old Trafford (and other regeneration in Trafford and Salford such as Ordsall and Partington). It will be an important consideration for both commissions for instance to ensure that residents in Old Trafford have the necessary skills and ability to access jobs in Trafford Park.

Carrington

2.102 Carrington is classed as a Priority Regeneration Area under Proposal E15 of the Trafford UDP. This permits new and replacement employment development to provide B1 business park and light industry, B2 manufacturing industry and B8 warehousing and distribution. Development is also permitted for remote off-airport car parking and new inland port and wharfage facilities. Accompanying infrastructure, landscape, environment and amenity proposals are also permitted.

2.103 The Core Strategy Preferred Option Paper sets out 3 options for Carrington. The first and second enable 30% and 35% of the Borough's jobs to be created there, with a focus on industrial and storage distribution uses to complement Trafford Park. Under each of the options, there are significant transport infrastructure issues and implications. The final option is for more moderate levels of development early in the Plan period, with a critical mass of facilities not being delivered until the longer term.

2.104 The inter-relationship between Trafford Park and nearby Carrington will be an important consideration for the Masterplan given that combined they will both account for the vast majority of employment growth within the borough. The Masterplan should seek to make recommendations on this relationship, setting out the role of Carrington in complementing rather than competing with Trafford Park.

Summary

2.105 Table 2.7overleaf summarises the key implications for the Masterplan of key recent or planned major developments in and adjacent to the Park.

Table 2.7 Development context – Key Implications for the Masterplan

- The Masterplan should seek to define current and future character areas and changing market conditions within the Park;
- The document should take into account major future developments planned to the eastern edge of the Park , in particular commercial development at MediaCity, residential development at Wharfside and Pomona, the continued presence of Manchester United and other leisure opportunities and environmental / open space improvements via the Irwell City Park initiative;
- The Masterplan should develop proposals which enhance the industrial core of the study area, taking into account major new industrial developments in the area and the changing needs of occupiers;
- Proposals at the western edge of the Park should link in with existing and planned commercial, industrial, leisure and residential activity at the Trafford Centre Rectangle as well as the Barton strategic development site;
- The Masterplan should clearly articulate the role and relationship of the Park with other potential complementary or competing sites such as Carrington in Trafford and Omega / Kingsway elsewhere;
- Nearly all of the major developments planned in or adjacent to the Park are likely to have significant access and transport implications – developing coherent public/private transport, cycling, pedestrian and public realm strategies is likely to be a major element of the Masterplan commission;
- The study should consider wider issues than purely economic factors, including the need for high quality residential, community and leisure facilities to support any new employment opportunities;
- The Masterplan needs to make recommendations to maximise the impact which the future development of the Park has for regeneration areas within the borough and the City of Salford, in particular ensuring that local people have the necessary skills to secure employment;
- During the Masterplan process there should be close engagement with the landowners / developers of major sites to identify any constraints and ensure close fit with emerging Masterplan proposals to ensure maximum impact.

Strategic Transport Policy

2.106 Given the scale and location (close to the strategic transport network) of Trafford Park, as well as the nature of many of its businesses (logistics, distribution and other industry), transport considerations, in particular the need to modernise the transport infrastructure to meet changing requirements, are important when developing new proposals

for the Park. This section sets out the national, regional and local policy context from which transport and access proposals should be developed. This baseline report will establish the headline public and private transport issues which are impacting on the functioning of the Park and potential areas of improvement within the estate. The final Masterplan will include a full transport and accessibility assessment and recommendations.

National Policy

2.107 The thrust of national transport policy is directed towards the achievement of a number of key goals which can be summarised as:

- Supporting continued sustainable economic growth;
- Reducing transport's contribution to greenhouse gas emissions and seeking to address climate change;
- Helping transport contribute to a safer, securer and healthier society;
- Helping to improving the overall quality of life; and
- Supporting equality of opportunity and reducing social exclusion.

2.108 These goals were recently re-stated in the Department for Transport's Policy Review Document – Towards a Sustainable Transport System- Supporting Economic Growth in a Low Carbon World (October 2007). This document, which develops the key themes of the Eddington Transport Review published in 2007, sets out how the Government intends to address the key transport challenges facing the nation. Government is clear that improved public transport connections have a key role to play as part of future strategy. Such improvements are considered necessary, not just to provide important alternatives to the private car but also to ensure that those people who are dependent on public transport services are able to access key local facilities and benefit from a growing economy.

2.109 By Introducing the Local Transport Bill into Parliament, Government has signalled its intention to support changes to governance arrangements to help to support more effective delivery of local transport across England. There is particular emphasis on the need to review delivery arrangements in the PTA areas outside London.

2.110 The measures in the Bill to strengthen the arrangements for delivering local bus services and providing greater flexibility for community transport operators are potentially important in the context of Trafford Park. These provisions include strengthened arrangements for the delivery of Statutory Quality Bus Partnerships, the lowering of the tests relating to the introduction of Quality Contracts (essentially a form of bus franchising), the strengthening of the role of Traffic Commissioners who oversee bus service delivery and greater flexibilities for community transport operators (designed to make it easier for such providers to fill gaps in conventional bus service provision).

2.111 Amendments are proposed to legislation governing the operation of community transport services, by changing the way in which Section 19 and 22 permits, which govern the licensing of such services, operate. The changes are designed to introduce greater freedom for community transport operators, by allowing them to pay their drivers when operating local services (section 22 services) and relaxing the restrictions on the issuing of section 19 permits. The greater flexibility which would result from these changes is potentially of particular benefit to an area where community transport provision could play a greater role in connecting areas of employment such as Trafford Park to residential communities. Some travel demands within the Park, particularly those arising from irregular shift patterns are unlikely to warrant the provision of a conventional bus service. The greater flexibility resulting from the proposals in the Transport Bill would potentially enable community transport operators, operating on a social enterprise model, to provide services in areas where it is not possible to achieve the level of commercial return that mainstream operators would require.

2.112 To summarise, therefore, the overall national transport policy framework is increasingly supportive of efforts to integrate different forms of passenger transport and to address perceived weaknesses in the current pattern of provision. This is clearly confirmed by the changes heralded by the Bill, coupled with the emphasis in Local Transport Plan Guidance and elsewhere on the need to improve passenger transport accessibility to key local services.

Regional / Local Policy

2.113 The North West Regional Assembly (NWRA) has published Draft Regional Planning Guidance which contains a Regional Transport Strategy (RTS). The Northwest Regional Development Agency, Highways Agency, Network Rail, local authorities and other stakeholders all play an important part in its development. The RTS establishes a regional context for the preparation of local transport plans and local development frameworks, and sets out the region's priorities for investment and management across all modes of transport.

2.114 The RTS supports the vision and objectives of the Regional Spatial Strategy by concentrating on the development of better transport links within the region, and between the North West and other parts of the UK, Ireland, mainland Europe and beyond. It aims to do this by significantly improving the quality and provision of public transport and by promoting a more structured approach to managing and selectively improving the region's highway network.

2.115 In so doing the RTS also aligns itself with the objectives of the Regional Economic Strategy to develop the North West's transport infrastructure to help realise the region's full economic potential. The RTS also advocates policies and proposals for managing travel which should contribute towards reducing greenhouse gas emissions from the transport sector.

2.116 A central theme of the RTS is the requirement to improve the effectiveness of the highway network serving major employment areas such as Trafford Park quality and also improving the quality of the local public transport network in order to ensure that residents with and without access to a car are able to access key local facilities.

2.117 In 2005/6 NWRA oversaw an exercise to prioritise major transport investment (schemes costing in excess of £5 million) in order to give advice to Government as part of the Regional Funding Allocation (RFA) process. The Regional Funding Allocation was announced as £1.358 billion over the ten year period from 2005/6 until 2015/16 in 2005 and following this announcement Atkins produced a spend profile of how this funding could be spread across schemes over the next ten years. The list of schemes which were prioritised for funding includes a number within Greater Manchester some of which will bring benefits to Trafford Park either directly or indirectly. These include:

- Metrolink expansion including the upgrading and renewal of phases 1 and 2 including the Altrincham and Eccles lines, the deliver of phase 3a including extensions to Oldham and Rochdale, Droylsden and Chorlton and longer term funding for further Metrolink extensions;
- The Leigh Salford Manchester Busway;
- Greater Manchester Urban Traffic Control Scheme;
- Yellow School Buses; and
- Local Transport Plan Policy and Transport Innovation Fund Proposals.

2.118 The Greater Manchester Local Transport Plan sets out a five year delivery programme within the ten Greater Manchester Authorities. It also contains a series of targets relating to priority transport outcomes covering areas such as improvements in road safety and air quality, better public transport services, cycling and pedestrian facilities and reduction in congestion. The ten local authorities work together to develop coordinated programmes designed to achieve the agreed outcomes.

2.119 Trafford Park is recognised within the Plan as a key employment centre Trafford MBC's own programme reflects the importance of improving transport connections within the Park and improving connections between the Park and the rest of the City Region.

2.120 In July 2007 the ten Greater Manchester authorities agreed to make a submission to the Government's Transport Innovation Fund. This is an additional funding stream made available to authorities that come forward with proposals designed to tackle rising congestion through packages of improvements to public transport along with measures to manage demand including congestion charging proposals.

2.121 The Greater Manchester submission was for a package of transport improvements costing some £2.7 billion along with a peak time only congestion charging scheme. On 9 June

2008 the Secretary of State agreed in principle to support the package by granting it “Programme Entry” status. The Greater Manchester Authorities have now agreed to conduct a major public consultation exercise into the proposals between July and October 2008 and AGMA will be deciding whether or not a local referendum will be held on the proposals at its meeting at the end of July.

2.122 The transport improvements which would be funded from the TIF, should the proposals proceed include a number of schemes of direct relevance to Trafford Park. These include;

- A remodelled and improved bus service with improved connections from neighbouring parts of Trafford, Salford and Manchester;
- A new station at White City to provide improved interchange between rail and Metrolink services and improved links to the Park and Manchester United’s ground; and
- A new Metrolink extension through the Park to the Trafford Centre leaving the existing Eccles line at Pomona.

2.123 The proposed congestion charging scheme consists of two charging rings, one located just inside the M60 and an inner ring between the M60 and the inner relief route. Under the published proposals Trafford Park would be situated between the outer and inner rings. The charging scheme is scheduled to be introduced no earlier than 2013, when it is estimated that 80% of the public transport improvements will be in place. There is a recognition by AGMA however that given planning timescales it will not be possible for the full package to be in place in Trafford Park by 2013 and therefore both an initial discount would be provided in the early years of operation and an urgent interim package of public transport improvements will be put in place. A consultation document detailing a Public Transport Plan for the Park has recently been produced and is being circulated widely within Trafford Park with comments requested back by October 2008.

Summary

2.124 Table 2.8 overleaf summarises the key implications for the Masterplan of strategic transport policy.

Table 2.8 Strategic Transport Policy– Key Implications for the Masterplan

- It will be important to consider the extent to which local people who are dependent on public transport are able to access economic opportunities on the Park;
- National measures to strengthen arrangements for local bus service delivery and the increased role of community transport operators could have an impact on public transport in the Park;
- Proposals should make links with the Regional Transport Strategy, which includes a central theme of improving the effectiveness of the highway and public transport network serving the region's major employment areas;
- Some of the major priority transport schemes within the sub-region are likely to bring benefits to Trafford Park either directly or indirectly;
- The Masterplan should consider the potential implications of the TIF proposals for Greater Manchester in particular, including the potential congestion charging scheme and transport improvements within the area; and
- Business consultation undertaken as part of the baseline stage should consider the ongoing public consultation which is being carried out in parallel on the TIF proposals.

Other Planning Considerations

2.125 This section sets out a brief summary of other planning considerations which should be considered when proposing new development on the Park.

Flood Risk

2.126 The Greater Manchester Strategic Flood Risk Assessment (SFRA) is currently being undertaken to provide the context to flood risk across the sub-region. Generic guidance will also be provided regarding the need for Level 2 assessments. The findings of the SFRA will be the key document used to inform Local Development Documents and assist in applying the sequential approach to ensure that flood risk has been considered fully when deciding on the precise locations of future growth. The Environment Agency's Flood Map shows that none of Trafford Park is located within either Flood Zone 3² or Flood Zone 2³, although parts of Salford on the western outskirts of the Park are within Flood Zone 3 and Flood Zone 2.

2.127 The emerging findings from the SFRA suggest that there will be some flooding issues in Trafford. Information is also held by major landowners relating to flood risk of the Ship Canal and has been released to the Environment Agency for verification. When the final

² Flood Zone 3 – a high risk 1% chance of river flooding

³ Flood Zone 2 - between a one in 100 and 1 in 1000 annual probability (chance) of river flooding

Masterplan is undertaken, any new development proposals will need to take into account the key findings from the finalised SFRA..

Developer Contributions

2.128 The full Masterplan for Trafford Park may consider the potential approach to and use of Section 106 (residential development) and section 278 (commercial development) monies should it propose areas of major change. Currently Trafford Council receives money from developers for use on a variety of projects in the Council's Capital Investment Programme including open space/play areas, affordable housing and transport related schemes. The most recent audit of developer contributions⁴ shows that contributions to the value of £4.7m were received over the period 2004-07 to support new capital expenditure.

2.129 The Trafford Supplementary Planning Document SPD1, adopted March 2007, sets out the Council's objectives and justification for securing developer contributions to highway and public transport schemes. The proposed extension of the Metrolink through Trafford Park to the Trafford Centre is cited as an example of a scheme whereby developers contribute to major programmed public transport schemes which will provide an alternative, non car, means of travel to new development sites.

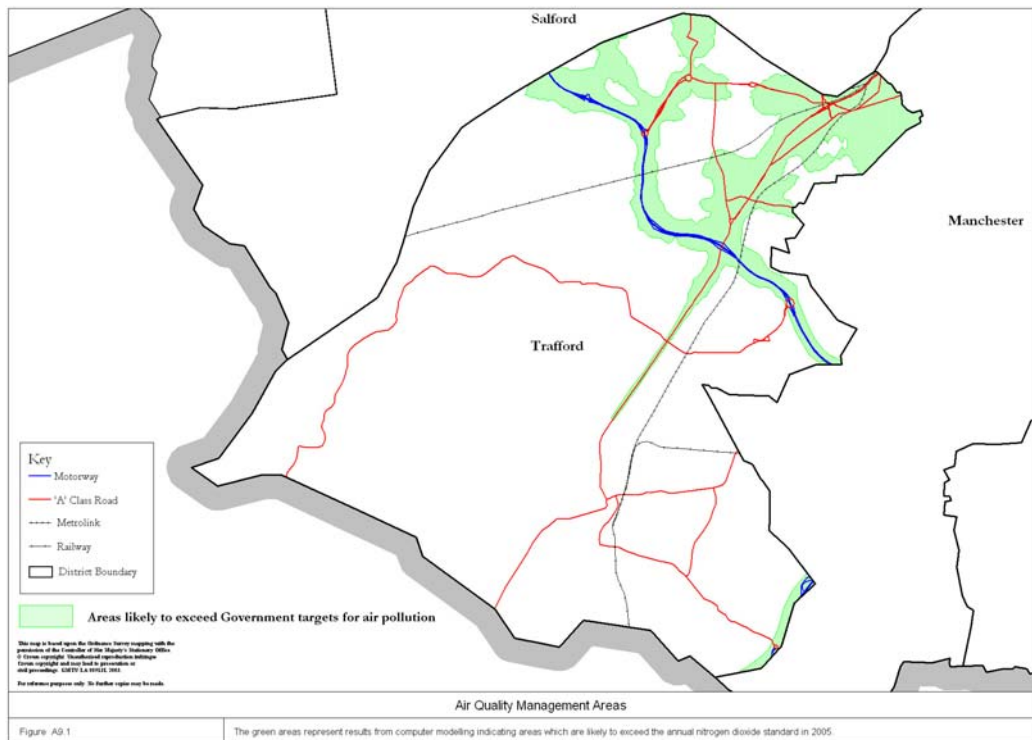
Air Quality Management Areas (AQMAs)

2.130 Local authorities are required to review air quality in their areas and where air quality objectives are not likely to be achieved, local authorities must designate air quality management areas. The most recent review of air quality across Greater Manchester was completed in 2004. All of the authorities within Greater Manchester have declared AQMAs and have worked together to produce an Air Quality Action Plan for Greater Manchester. Within these, individual authorities have set out a series of actions which they intend to do in order to address air quality issues in their area.

2.131 Figure 2.5 overleaf shows that the most affected part of Trafford is in the north of the borough, in and around Trafford Park, in the area bordering the M60 Motorway and main roads. The primary source of Nitrogen Dioxide (the pollutant of most concern) is road traffic.

⁴ Trafford MBC Accounts and Audit Committee, Section 106 Developer Contributions, 26/09/2007

Figure 2.5 Air Quality Management Areas in Trafford



2.132 The area close to the M60 junction 9 was declared as one of the worst case areas, along with Stretford, Old Trafford and parts of Sale. A series of strategies within the borough are currently being delivered that will contribute to improving air quality in such areas, particularly by reducing transport. The lack of residential development close to the Park, public transport links and nature of businesses on the Park has lead to a heavy reliance on motor vehicles to access the Park and serve its businesses. Given the presence of Trafford Park within an area of poor air quality, any proposals on Trafford Park should give consideration to the impact on air quality of existing and new development and any specific mitigation measures, in particular transport related schemes, which may be appropriate.

Design / Sustainability

2.133 Sustainability and the delivery of high quality design, low or zero carbon development has emerged as a key national priority within the development sector over the past few years and is a new and challenging concept. Current planning policy within Trafford does not include any specific and up to date supplementary guidance relating to design standards on Trafford Park. Guidance for industrial development in the borough in particular dates back to 1994, since when there have been major developments in design standards and the delivery of high quality development. The Masterplan should set out objectives and policies to influence and shape future development on the Park in terms of related sustainability issues such as green infrastructure and the nature and quality of development coming forward.

Listed Buildings

2.134 Proposal ENV24 within the Trafford UDP sets out policy with regards to how 'Buildings of Special Architectural or Historic Interest' will be monitored and preserved, whilst proposal ENV25 sets out policy with regards to new use for listed buildings and buildings in conservation areas.

2.135 There are nearly 300 listed buildings within Trafford, as set out in the 'Listed Buildings Register'. Of these, two are located within Trafford Park - the Trafford Park Hotel on Ashburton Road East as well as the Trafford Road Bridge across the Manchester Ship Canal. Both of these are Grade 2 listed. In addition, the Barton Bridge just outside the study area is also listed.

Transport Alignments

2.136 Policy TP11 sets out planning policy with regards to rail routes within Trafford Park. The Trafford Park (Freight) Railway, the Manchester Ship Canal (Freight) Railway and the proposed Metrolink extension route to Trafford Quays and across to the Barton Strategic Site and Eccles are all safeguarded.

2.137 The policy also supports the development of stations at the following areas:

- White City - a new station on the Railtrack line in the vicinity of the White City Junction;
- The Trafford Centre - a new station and the provision of passenger rail services utilising the existing Ship anal (freight) Railway;
- Wharfside, the Village, Mosley Road, Park Way and the Trafford Centre - new stations on the proposed Metrolink extension through the Park;

2.138 No permission will be granted for planning applications that may prejudice either the protected routes or potential station development proposals.

Table 2.9 Other Planning Considerations– Key Implications for the Masterplan

- There are a series of other planning considerations which should be taken into account in the production of the Masterplan, including flood risk, air quality, protected transport alignments and sustainability issues;
- The Masterplan should consider the findings from the SFRA, particularly when proposing any areas of major change;
- Should major new development be proposed, the Masterplan may usefully consider a standard approach and use of developer contributions to highways and other infrastructure on the Park;
- The Masterplan should set clear targets and objectives for the quality and design standard of new development on the Park; and
- Trafford Park is one of the worst air quality areas in Trafford, and the Masterplan should consider the impact of proposals on air quality as well other related sustainability issues such as high quality design and low carbon developments.

Summary

2.139 This section of the report has provided the planning, regeneration and development context from which to develop Masterplan proposals for Trafford Park. The Park is clearly of sub-regional and regional economic significance and the work needs to articulate its current and future role in the region and city-regional economies. It also however needs to make recommendations which are Trafford Park specific, recognising the diverse and unique character of the Park and its occupiers.

2.140 Currently policy and strategy for the area is slightly fragmented and, in parts, outdated, given the transformational nature of the Park and its surrounding areas. The area has not seen a Masterplan, or indeed a co-ordinated approach to its development, since the mid 1990s and the final work of the Trafford Park UDC. The Masterplan needs to take into account existing local planning policy, but should also seek to shape future planning policy in the area, aligning economic development and spatial land use policy with an understanding of the drivers for future growth and commercial investment proposals at a local level.

2.141 It should aim to develop a shared vision amongst partners including the public sector, landowners, developers, occupiers and residents to take forward the future development of the Park – understanding the views, aspirations and needs of key partners and directing the market to deliver collective economic and commercial aspirations. Linkages to major current and planned development in and around the Park should be pursued, and there should be a focus on maximising its potential impact as a source of employment for regeneration areas within its vicinity. The need to deliver modern and co-ordinated infrastructure to support development, particularly from a transport perspective, is a key consideration. The Masterplan

should also seek to set out actions and objectives relating to issues such as design standards, green infrastructure, public transport and cycle routes in order to minimise the environmental impact of new developments and improve air quality within the Park.

2.142 Trafford Park is a key asset for the region's economy and the Masterplan needs to raise the profile of the Park as a Premier Business Location and be conducive to development as long as it is of the correct type, scale and location. It should help to ensure that the Park is able to deliver its true potential from an economic, social and environmental perspective - delivering sustainable outcomes over the next phase of its development.

3 Economic Activity on Trafford Park

Introduction

3.1 This chapter draws on information taken from a wide evidence base in order to provide an analysis of economic activity on Trafford Park. A robust economic baseline analysis is critical in informing the Masterplan and developing sound conclusions and recommendations by ensuring that we proceed from an informed position. The chapter is split into two parts with part one focussing on the Greater Manchester economy and part two focussing on Trafford Park and Trafford economies. A technical note at the end of this chapter outlines the data Sources and geographies used in this analysis.

Greater Manchester Economy

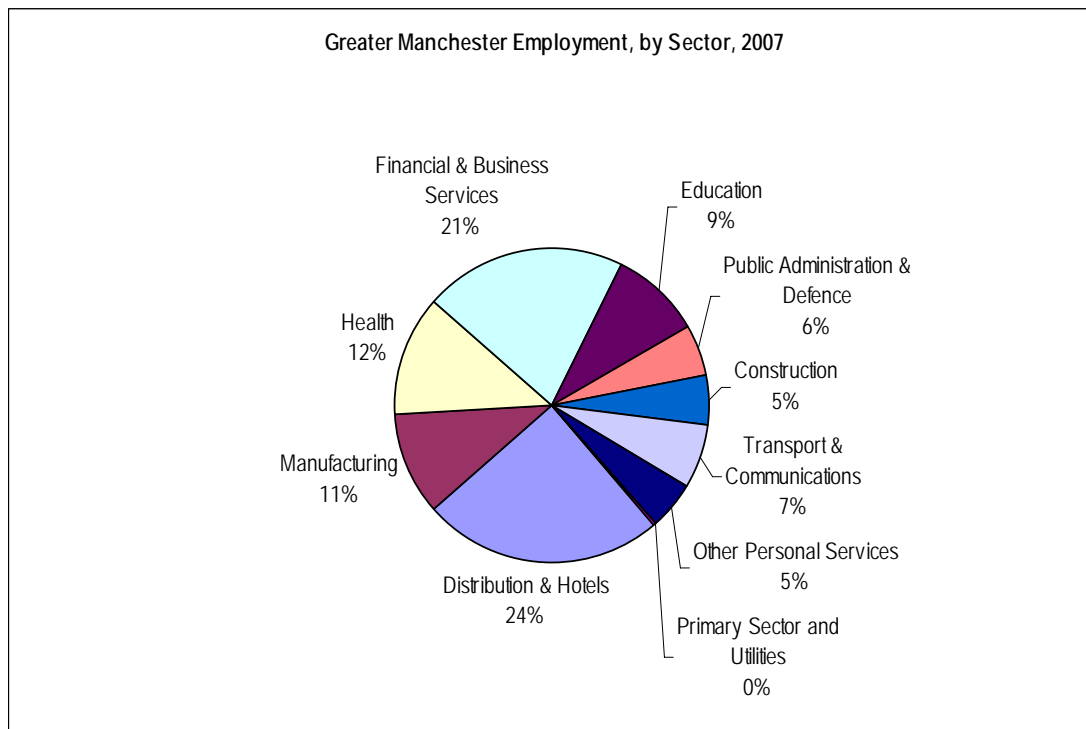
3.2 The first part of the Economic Analysis Chapter focuses on the current employment and business base and future trends predicted for Greater Manchester. It provides contextual information for the second part of the chapter which has a more local focus, referring to Trafford and Trafford Park.

3.3 The Greater Manchester sub-region has been one of the fastest growing in the UK, with both strong growth in employment and GVA over a sustained period. The Greater Manchester Forecasting Model (GMFM) reports a 9.5% increase in employment between 1997 and 2007 in the sub region. The Trafford increase was 16%, while the City of Manchester recorded an employment increase of 14.7%. Strong growth at the core of the conurbation is a feature of future employment forecasts.

3.4 The result of this employment growth continues the process of the move towards a service sector economy, including both public and private sector sub sectors. The greatest change was the growth in Financial and Business Services, which accounts for 21% of employment, although this lags behind the national average. The further growth in the economy has increased the importance of distribution and retail which account for almost one in four of all jobs. By contrast, manufacturing employment had fallen to 11% of total employment, continuing the long term decline of the industrial employment base.

Figure 3.1 illustrates the split in Greater Manchester employment by sector in 2007.

Figure 3.1

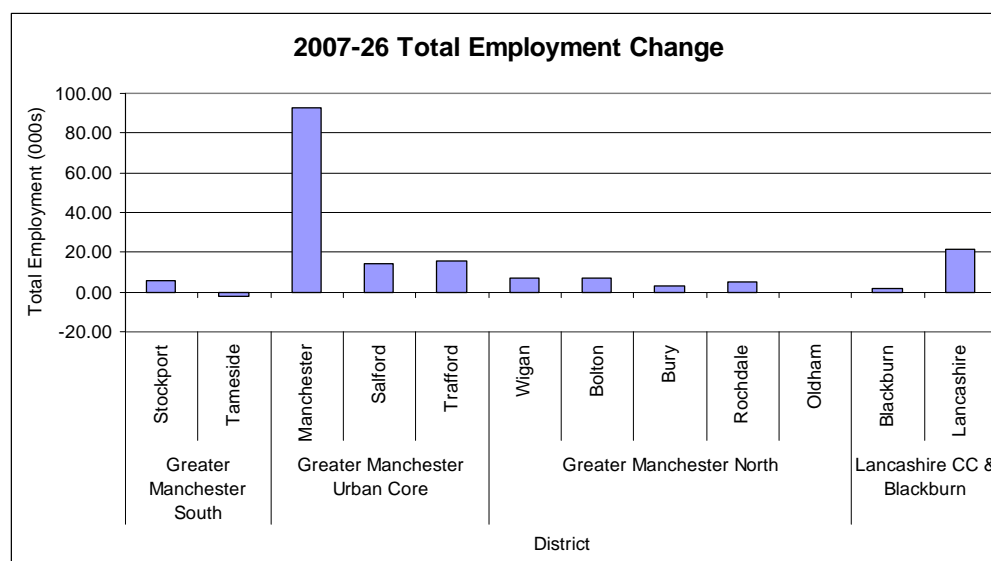


Source: Greater Manchester Forecasting Model 2007

3.5 The GMFM provides employment forecasts to the year 2026 as shown in figure 3.2. These shows that employment growth will be concentrated at the core of the conurbation, with the City of Manchester accounting for well over half of net employment growth, an additional 80,000 jobs.. This reflects the type of sectors where growth is forecast to increase, where City locations are an advantage, and the absence of a (declining) manufacturing base in the City. There are major land and transport related issues for the City in accommodating this scale of additional employment.

3.6 The other two locations where employment will increase significantly are Salford and Trafford, at the core of the conurbation. The increase in Trafford is substantial, and significantly higher than many of the other Boroughs, such as Wigan and Bolton. As a contextual comparison, the growth in Lancashire will be modest.

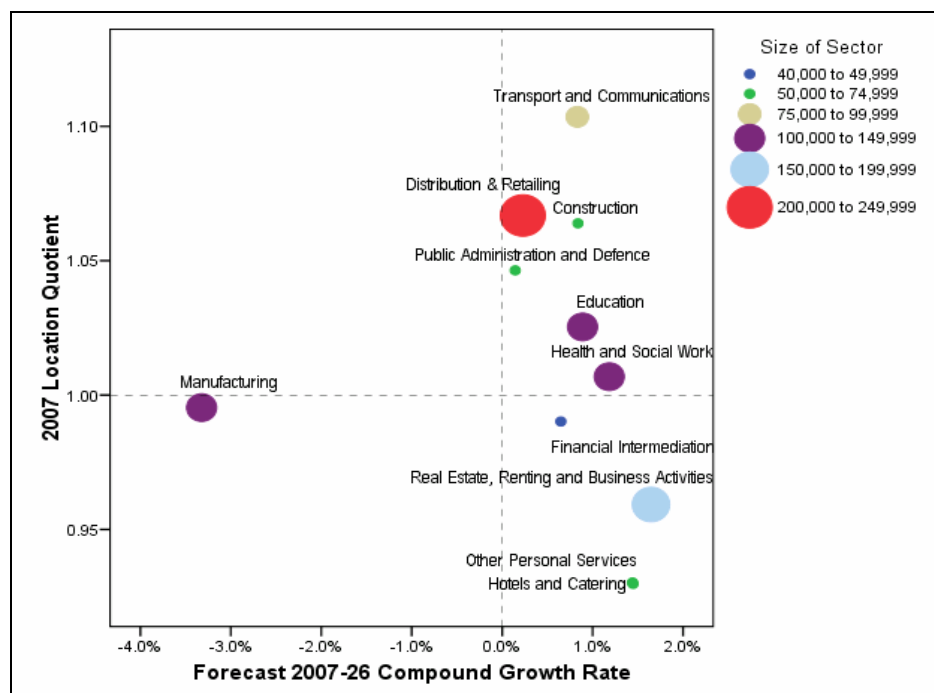
Figure 3.2



Source: Oxford Economics

3.7 The model also indicates the broad sectors of growth, their relative strength in the sub region, and the scale of employment. As figure 3.3 below illustrates, the greatest relative growth will be in education and health, where the sub region already has above average employment, and business services. The most significant growth in terms of absolute numbers will be in distribution and retailing, where again the sub region has slightly higher than average employment.

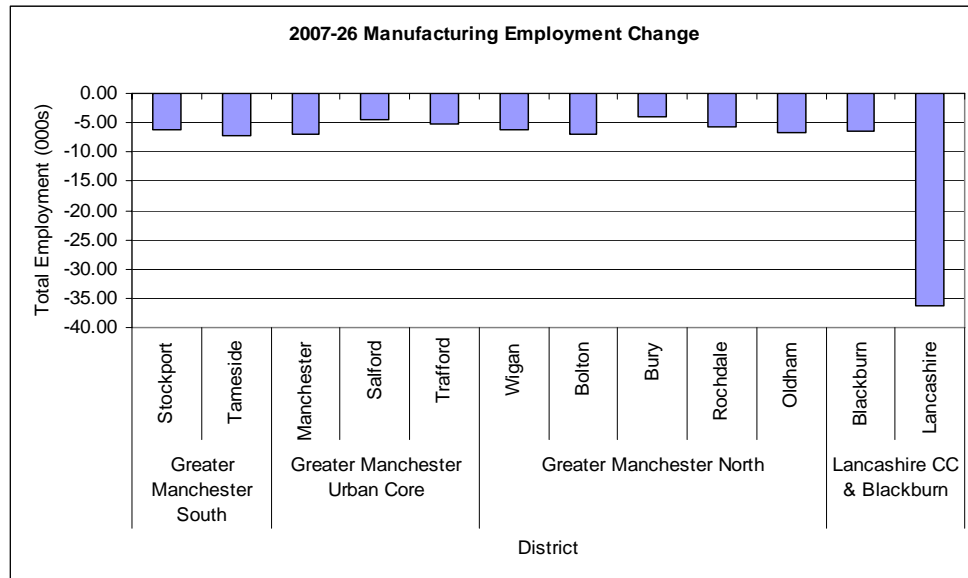
Figure 3.3 Growth and specialisation in Greater Manchester



Source: Greater Manchester Forecasting Model 2007

3.8 Manufacturing decline is forecast across the conurbation, and this follows the long term trend of a decline of 2%-3% over annum as can be seen in figure 3.4. The largest employment losses will be in Stockport, Tameside, Manchester and Oldham. There will also be substantial job losses in Lancashire, and there will be implications for supply chain and sub contractors in Greater Manchester.

Figure 3.4 2007-2026 Manufacturing Employment Change

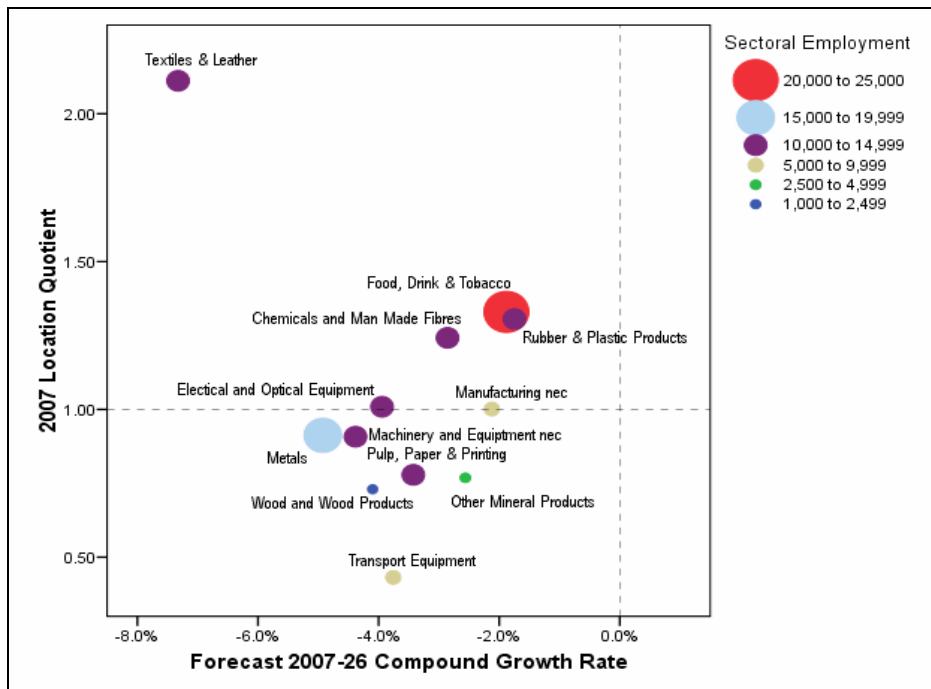


Source: Oxford Economics

3.9 Figure 3.5 illustrates the long term trend of manufacturing sub sectors in Greater Manchester. These are forecasted to decline in employment terms over the next twenty years. The most significant sector likely to maintain a significant employment presence is Food, Drink and Tobacco, although the forecast rate of decline is still 2% per annum. A major sub sector where there is likely to be substantial employment decline in Manchester and equipment where a 5% per annum employment decline is forecast.

3.10 For many other sub sectors, some of which are very important at a local level, the long term rate of decline is 4% per annum. This includes major employment niches in chemicals; pulp, paper and printing; and transport equipment.

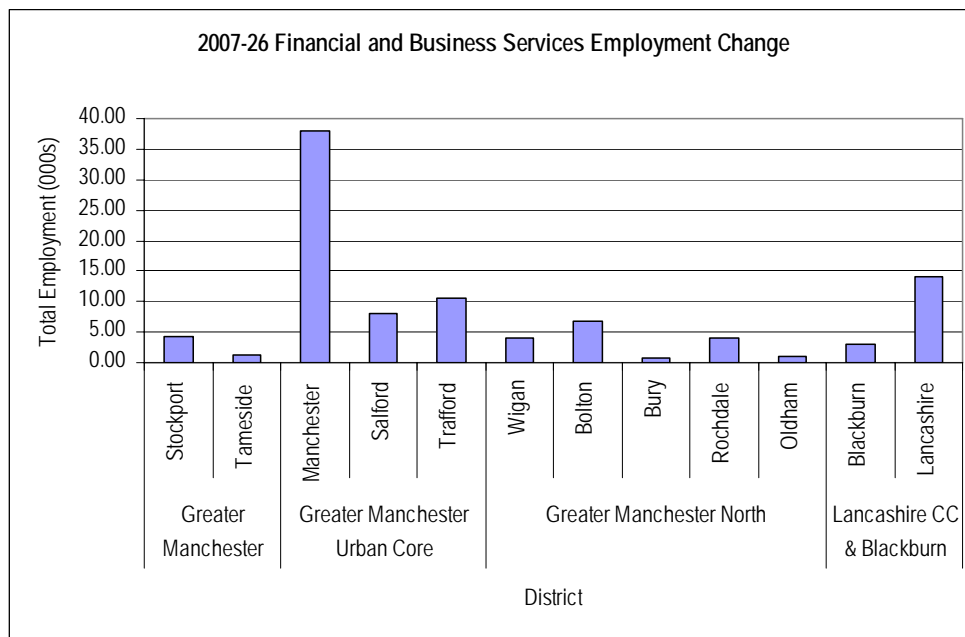
Figure 3.5 Growth & specialisation in Greater Manchester: manufacturing sub-sectors



Source: Greater Manchester Forecasting Model 2007

3.11 Financial and Business Services is forecast to be one of the faster growing sectors in the sub region over the next twenty years as is illustrated in figure 3.6 below. Employment growth is likely to focus on the City of Manchester and the core of the conurbation (Trafford and Salford). The growth in Trafford, at over 10,000 jobs is considerable.

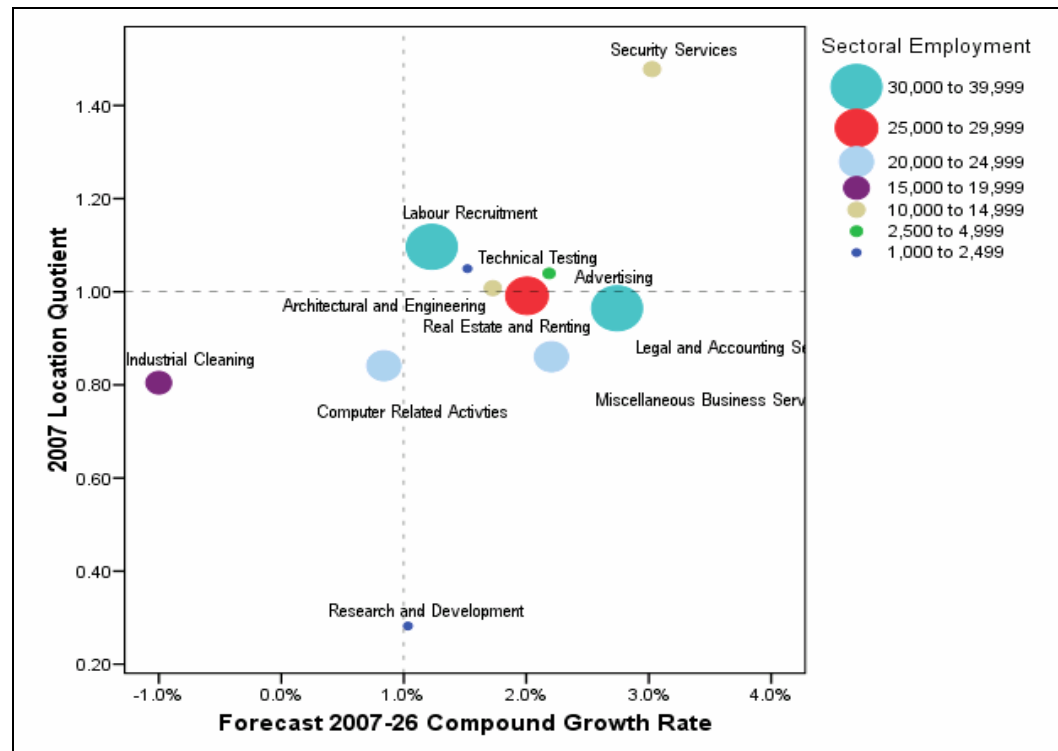
Figure 3.6



Source: Oxford Economics

3.12 With regard to business services, in spite of recent growth, the sub region is underrepresented in many of the key sub sectors, suggesting there is scope for further growth. According to figure 3.7 business services growth is anticipated in legal and accounting services, real estate and renting and miscellaneous business services. While some of these forecasts will be affected by the current economic slowdown, they are expected to be realised over the twenty year period.

Figure 3.7 Growth and specialisation in Business Services in Greater Manchester



Source: Greater Manchester Forecasting Model 2007

3.13 Another sector where employment growth will grow is Distribution and Hotels. Figure 3.8 illustrates the changes in the sector which accounts for a significant proportion of total employment growth, focused in the city of Manchester (16,000 or 50% of employment growth in the sub region).

3.14 Trafford is forecasted to have the second largest employment growth, and while the numbers are modest, they are additional to the already significant employment base in the Borough. The Lancashire growth reflects the ambitious new plans being developed by Preston.

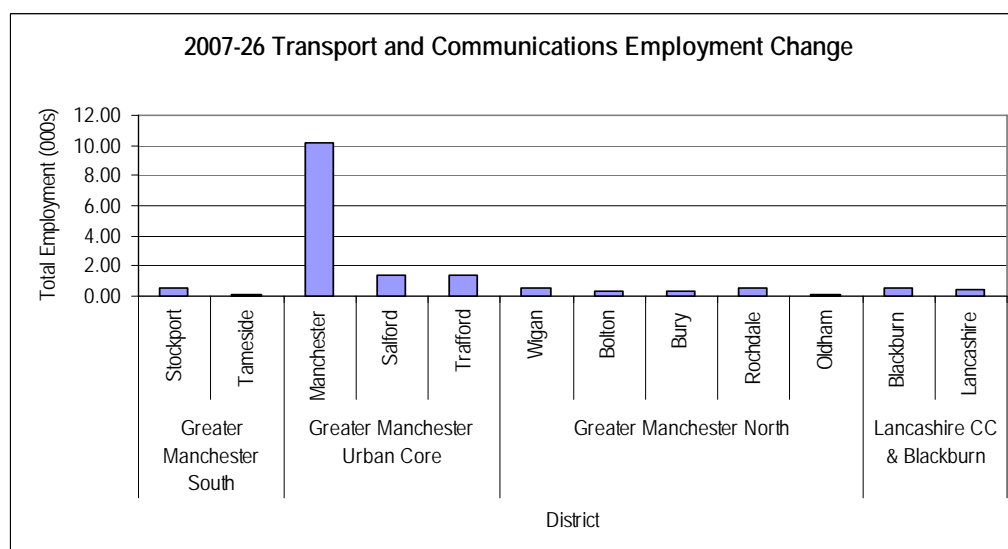
Figure 3.8



Source: Oxford Economics

3.15 Figure 3.9 illustrates the change forecasted in transport and communications in Greater Manchester. Overall 14,000 additional jobs are forecast to be created in the Transport and Communications sector, however almost 81% of these are expected to be located within the Greater Manchester Urban Core. Again, the overwhelming majority are in Manchester.

Figure 3.9



Source: Oxford Economics

Greater Manchester Summary

3.16 The Greater Manchester economy has grown rapidly and the economic forecasts suggest this will continue. The key features are:

- The Greater Manchester Urban Core is a major employment centre within the North of England and will increase its influence over the next twenty years. The new and distinctive feature of Greater Manchester and other northern economies is the strong representation in the Financial and Business Services sectors (which has been the key driver of economic growth nationally for many years) and the scale of the conurbation (with population forecast to grow further).
- The most significant feature of the economic forecast is the exceptionally high proportion of employment growth which will take place in the City of Manchester. This is a new phenomenon, apparent since the mid 1990s, reversing decades of population and employment decline when many sectors move from inner city locations to new employment sites in Boroughs such as Wigan and Bolton and new towns such as Warrington.
- Greater Manchester will also experience a substantial decline in manufacturing employment (59,000 jobs over twenty years).
- Employment opportunities growth will be significant in the Financial and Business Services, Hotels and Distribution, and Other Personal Services sectors and the majority of these opportunities will be located within Manchester's Urban Core, with a focus on the City itself.

Trafford Park Economy

3.17 The second part of the Economic Analysis Chapter focuses on the current base and trends taking place in employment and business on a more local level. Where possible, this is focussed on Trafford Park study area, Trafford Park wards or Trafford Borough. For explanation of the geographies referred to in this section, refer to the technical data at the end of the chapter.

Current Economic Base

3.18 This section sets the context for the rest of the economic analysis by examining the current economic base of the Trafford Park Economy according to the most recent ABI data available which is 2006. It is also supplemented by data from Hoovers for 2008.

Employment by Sector

3.19 Table 3.1 sets out total employment by sector in Trafford Park according to ABI. Only those sectors with significant employment numbers are listed although the total employment includes all sectors, even those not listed in table 3.1.

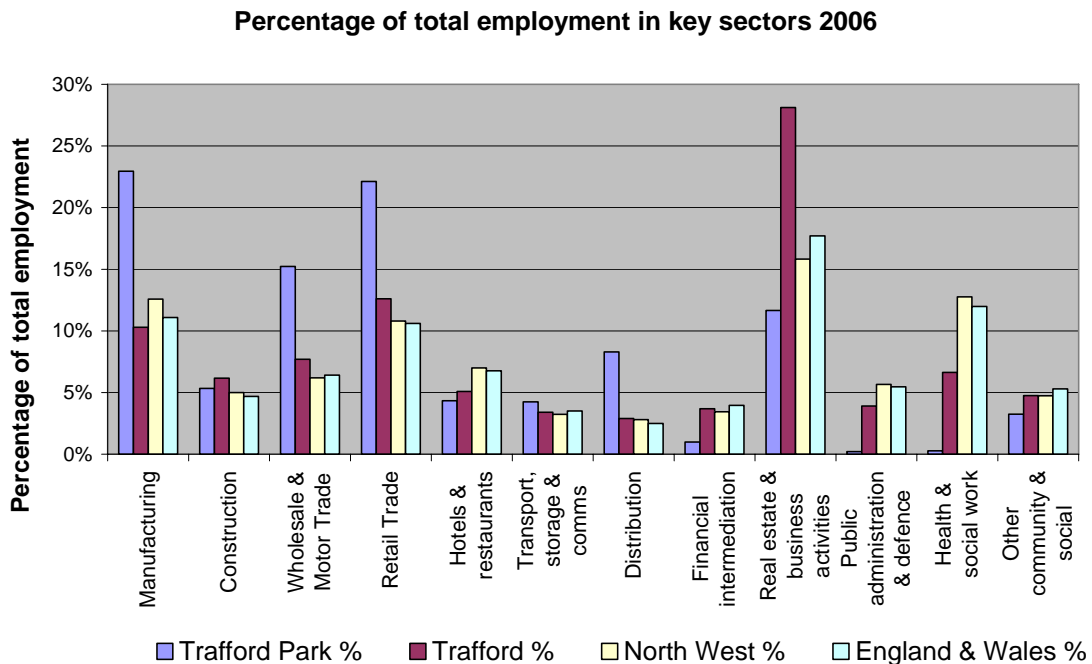
Table 3.1 Employment by sector in 2006

| Sectors | Trafford Park Total Employment | Trafford Park (%) of total | Trafford (%) of total | North West (%) of total | England/ Wales (%) total |
|-----------------------------------|-----------------------------------|-------------------------------|-----------------------------|----------------------------|--------------------------------|
| Manufacturing | 7,338 | 22.95% | 10.30% | 12.57% | 11.08% |
| Construction | 1,705 | 5.33% | 6.16% | 5.00% | 4.70% |
| Wholesale & Motor Trade | 4,873 | 15.24% | 7.70% | 6.20% | 6.40% |
| Retail Trade | 7,074 | 22.12% | 12.60% | 10.80% | 10.60% |
| Hotels & restaurants | 1,389 | 4.34% | 5.09% | 7.00% | 6.76% |
| Transport, storage & comms | 1,358 | 4.25% | 3.40% | 3.24% | 3.50% |
| Distribution | 2,654 | 8.30% | 2.90% | 2.80% | 2.50% |
| Financial intermediation | 315 | 0.99% | 3.68% | 3.45% | 3.96% |
| Real estate & business activities | 3,728 | 11.66% | 28.12% | 15.83% | 17.70% |
| Public administration & defence | 68 | 0.21% | 3.91% | 5.65% | 5.46% |
| Health & social work | 87 | 0.27% | 6.63% | 12.77% | 11.99% |
| Community & social activities | 1,038 | 3.25% | 4.76% | 4.74% | 5.30% |
| Total employment in 2006 | 31,974 | | | | |

Source: ANNUAL BUSINESS ENQUIRY 2006, NOMIS

3.20 In total 31,974 were employed in Trafford Park in 2006 accordingly to ABI, which is broken down by sector in column one in table 3.1. Manufacturing has the most employees but for easier comparison of the different sectors, Figure 3.10 below illustrates the above information in graph format.

Figure 3.10



Source: ANNUAL BUSINESS ENQUIRY 2006, NOMIS

3.21 Two broad sectors dominate employment in Trafford Park:

- **Wholesale and retail trade** accounted for 37% of total employment in 2006, nearly 12,000 employees in total. This is more than double the equivalent regional and national percentages (both of which are 17%). Retail employs more people than wholesale with almost 60% of the total number of employees in this sector employed in retail alone.
- **Manufacturing**, the second largest broad sector, accounting for nearly a quarter of all employment on the Park, totalling over 7,000 employees (22.95% of total). This is again much larger than the equivalent percentage figure for England and Wales which stands at 11% and the regional figure of 12.6%. Trafford Park continues to be a key employment location for manufacturing businesses.

3.22 Despite recent office development at the periphery of the Park, financial intermediation and real estate & business activities are under-represented compared to the

North West and nationally. Currently just over 4,000 people are employed in the sector, accounting for just 13% of all employment compared with 20% nationally.

3.23 Another significant employer is distribution which is the fifth largest employer in the Park with 2,654 people employed in the sector, accounting for nearly 8.5% of total employment in the study area. This is nearly three times the percentage of people employed in this sector both regionally and nationally.

3.24 Employment in construction is similar to the national and regional averages at around 5% of total employment with 1705 people employed in this sector on the Park.

3.25 As would be expected from a business park, employment in public administration, education & health and social work is low in Trafford Park with less than 4% of people employed in these sectors all together.

Business by Sector

3.26 Table 3.2 shows the number of businesses in Trafford Park in 2006 and then gives the percentage of total businesses in comparison to local, regional and national figures.

Table 3.2 Business by sector in 2006

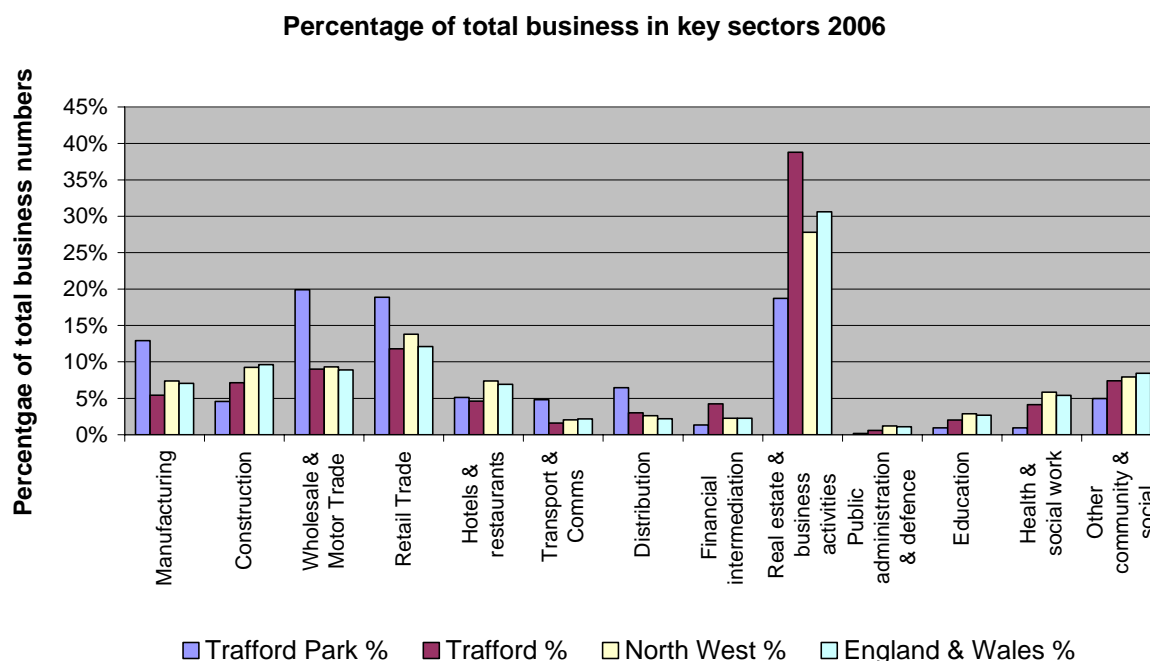
| Sectors | TP Total Business | Percentage of total business | | | |
|-------------------------------------|-------------------|------------------------------|-----------------------|-------------------------|------------------------------|
| | | Trafford Park (%) of total | Trafford (%) of total | North West (%) of total | England & Wales (%) of total |
| Manufacturing | 164 | 12.90% | 5.43% | 7.37% | 7.05% |
| Construction | 58 | 4.56% | 7.13% | 9.24% | 9.62% |
| Wholesale & Motor Trade | 253 | 19.91% | 9.00% | 9.30% | 8.90% |
| Retail Trade | 240 | 18.88% | 11.80% | 13.80% | 12.10% |
| Hotels & restaurants | 65 | 5.11% | 4.62% | 7.39% | 6.93% |
| Transport & Comms | 61 | 4.80% | 1.60% | 2.03% | 2.16% |
| Distribution | 82 | 6.45% | 3.00% | 2.60% | 2.20% |
| Financial intermediation | 17 | 1.34% | 4.23% | 2.26% | 2.25% |
| Real estate & business activities | 238 | 18.73% | 38.80% | 27.79% | 30.63% |
| Public administration & defence | 2 | 0.16% | 0.60% | 1.18% | 1.09% |
| Education | 12 | 0.94% | 2.00% | 2.87% | 2.69% |
| Health & social work | 12 | 0.94% | 4.11% | 5.83% | 5.40% |
| Other community & social activities | 63 | 4.96% | 7.40% | 7.93% | 8.43% |
| Total business in Trafford Park | 1,271 | | | | |

Source: ANNUAL BUSINESS ENQUIRY 2006, NOMIS

3.27 There were 1,271 businesses in Trafford Park in 2006. Again, like the employment data this table only presents data from those sectors which are considered to have a significant presence in Trafford Park but the business number total is for all sectors in Trafford Park.

3.28 Figure 3.11 presents the data from table 3.2 in format allowing for easier comparison of business number by sector.

Figure 3.11



Source: ANNUAL BUSINESS ENQUIRY 2006, NOMIS

3.29 The business base in Trafford Park reflects the combined influences of the national (typical) business structure and the intensity of employment. The key features are:-

- The domination of **wholesale and retail businesses**, with almost 500 companies (38.8%), double the equivalent regional and national figures, and in line with the employment analysis.
- A large **manufacturing** business base, with some 164 companies, although the comparison with the national proportion of businesses (12.9% TP and 7.0% national) and employment (22.9% TP and 11.1% national) is narrower, suggesting that companies in Trafford Park are larger than average.
- While **real estate and business activities** has the second largest number of businesses (238), it only employs the fourth largest amount of employees. The proportion of all businesses at 18.7% is considerably lower than Trafford (38.8%),

regional (27.8%) and national figures (30.6%). The Trafford figure at 38.8% is exceptionally high.

3.30 In Trafford Park manufacturing businesses are larger, employing 45 people per business, compared with 15 on average for real estate and business activities. This is in line with what would be expected for these types of businesses.

3.31 The high numbers of employment in distribution seen in figure 3.10 is also reflected in figure 3.11 with a significantly higher number of businesses in this sector than elsewhere. Like the employment trends, the figure for Trafford Park in the distribution sector almost three times what it is regionally and nationally.

3.32 The relatively high number of hotels and restaurants compared to Trafford is accounted for by the presence of the Trafford Centre, which has approximately 60 restaurants. This would suggest that a very low number of hotels and restaurants are located outside the Trafford Centre, which again is to be expected of a business park.

3.33 Table 3.3 shows industry sectors as a percentage of total business numbers in Trafford Park for 2008 according to Hoovers Business Directory. This directory was also used to target businesses with the business survey. It provides a useful overview of industry sector splits in 2008, which is slightly more recent than the ABI data. The main difference between Hoovers data and ABI is that Hoovers breaks the industrial sectors down to sub-sectors. For the purpose of comparison, the sub-sectors within each of the key sectors in Trafford Park have been grouped together.

3.34 The key features of the Hoovers data are:-

- Retail and wholesale account for 30% of total business in Trafford Park. This is less than the ABI data which shows Retail and Wholesale with 38% share of total businesses.
- Hoovers breaks manufacturing down into 17 sub-categories using a five digit SIC code. If grouped together, manufacturing currently represents 13% of total businesses compared to 12.9% in 2006 according to the ABI data. There are significant numbers in various sub sectors of which the largest is machinery and equipment with 26 companies.

3.35 The data provided by Hoovers confirms the large presence of retail, wholesale, real estate & business activities, manufacture and to a lesser extent, transportation, storage and communications, which also includes distribution as a sub-sector.

Table 3.3 Number of businesses and percentage in selected sectors 2008 (Hoovers)

| Sector | No of businesses | (%) of total businesses |
|------------------------------------------------------|-------------------------|--------------------------------|
| Manufacture | | |
| Manufacture non-metallic mineral products | 8 | 0.9% |
| Manufacture rubber & plastic products | 9 | 1.0% |
| Manufacture electrical machinery | 9 | 1.0% |
| Manufacture chemicals & chemical products | 10 | 1.1% |
| Manufacture furniture | 14 | 1.5% |
| Manufacture fabricated metal products | 15 | 1.6% |
| Manufacture machinery & equipment | 26 | 2.8% |
| Manufacture total | 91 | 9.7% |
| Retail & Wholesale | | |
| Wholesale/commission trade | 133 | 14.1% |
| Retail trade | 138 | 14.7% |
| Retail & Wholesale total | 271 | 28.8% |
| Real Estate & Business Activities | | |
| Real estate activities | 18 | 1.9% |
| Other business activities | 104 | 11.1% |
| Renting machinery & equipment | 24 | 2.6% |
| Computer & related activities | 13 | 1.4% |
| Sale & maintenance motor vehicles | 46 | 4.9% |
| Retail & Business Activities total | 205 | 21.8% |
| Transport, storage & communications | | |
| Post & telecommunications | 13 | 1.4% |
| Land transport; transport via pipelines | 35 | 3.7% |
| Supporting & auxiliary transport activities | 57 | 6.1% |
| Transport, storage & communications total | 105 | 11.2% |
| Publishing & printing of recorded media | 14 | 1.5% |
| Recreational & leisure activities | 15 | 1.6% |
| Hotels & restaurants | 32 | 3.4% |
| Financial intermediation | 13 | 1.4% |
| Construction | 45 | 4.8% |
| Other sectors (with less than 8 businesses) | 64 | 6.9% |
| Total number of business in 2008 | 941 | |

Source: Hoovers Business Directory, 2008

Recent Business and Employment Trends

3.36 This section examines recent business and employment trends by sector between 2003 and 2006 and also longer term trends for total employment and business numbers. In order to illustrate the recent business and employment sector trends which have taken place in the study area, ABI data by SOA is referred to which provides data for 2003-2006.

3.37 For longer-term trends in employment and business levels two sources of data is used. Firstly, ward specific data from ABI and its predecessor the Annual Employment Survey (AES) is referred to which has a time frame of 1991-2006. Ward level ABI and AES is also available by sector but this data will be used in the following section of the chapter which provides more detail sector analysis. Secondly, employment figures for Trafford Borough from Greater Manchester Forecasting Model is used. It should be noted that business unit figures are not available from GMFM but this data source does provide useful comparative data for the North West and UK.

3.38 For a further explanation of the above data sources, refer to the technical notes at the end of this chapter.

Share of Greater Manchester Economy Over Time

3.39 Figure 3.12 illustrates the percentage share of Trafford Park of the Greater Manchester economy in terms of business numbers and employment and compares them over time. This helps to contextualise the importance of the Trafford Park economy to the region as a whole.

Figure 3.12



Source: ANNUAL BUSINESS ENQUIRY 2006, NOMIS

3.40 Trafford Park is the key driver of economic activity in Trafford and has a significant role in the city region economy. Figure 3.12 illustrates the percentage share of the Trafford economy in terms of both businesses and employment numbers in Greater Manchester.

3.41 Figure 3.12 also illustrates that Trafford Park accounts for nearly 3% of employment in Greater Manchester in 2006 but less than 1.5% of businesses. This suggests the presence of larger businesses with fewer employers which is typical of the make up of most large parks, where there are more limited accommodation for the micro-enterprises which make up the vast majority of the business base.

3.42 Both employment and business numbers have remained steady over the four year period between 2003 and 2006. There has been a very slight increase from 2003 with the Trafford Park share of employment rising by 1% although business numbers dropped by 2%. This data was taken from a short timeframe and the changes are not significant, and no definitive conclusions can be made as to whether the Trafford Park economy has become more or less significant to the region's economy. Business and Employment Trends

Total Employment Over Time

3.43 Table 3.4 presents data taken from ABI over time for total employment over time. It also looks at the percentage change in each sector as well as total employment percentage change between 2003 and 2006. The percentage change can be somewhat misleading with some very small sectors almost doubling their employment figures over time which shows a high percentage increase while the actual employment numbers still remaining insignificant to the Trafford Park economy. For this reason, the final column identifies the actual value of the increase or decrease in employment.

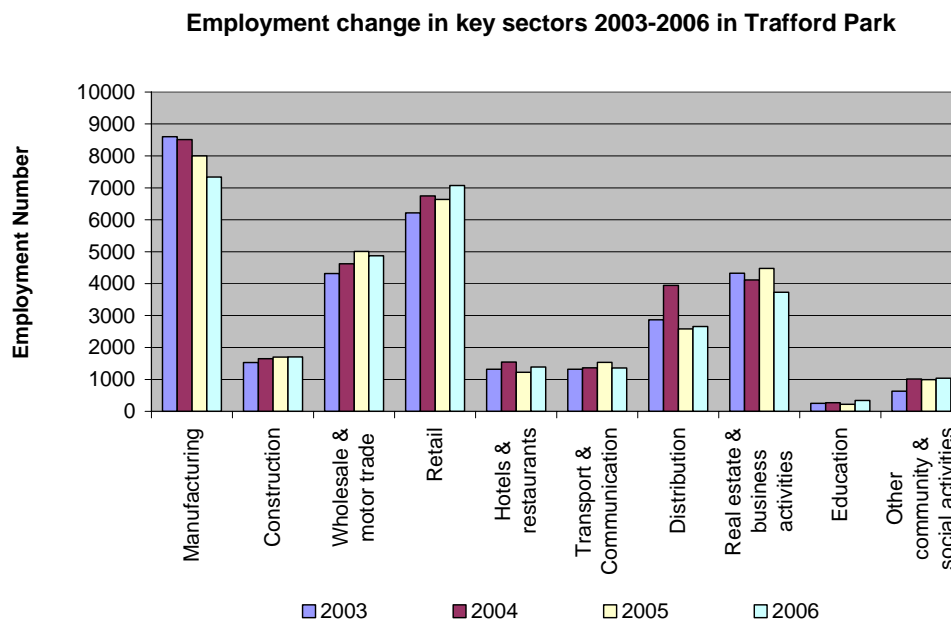
Table 3.4 Total Trafford Park employment over time (includes data omitted from table 3.4)

| Sectors | 2003 | 2004 | 2005 | 2006 | % change | Difference |
|-----------------------------------|--------|--------|--------|--------|----------|------------|
| Manufacturing | 8600 | 8508 | 7999 | 7338 | -14.67% | -1262 |
| Construction | 1528 | 1646 | 1697 | 1705 | 11.58% | 177 |
| Wholesale and Motor Trade | 4315 | 4623 | 5009 | 4873 | 12.93% | 558 |
| Retail | 6215 | 6747 | 6632 | 7074 | 13.82% | 859 |
| Hotels & restaurants | 1320 | 1547 | 1222 | 1389 | 5.23% | 69 |
| Transport and Communication | 1319 | 1364 | 1533 | 1358 | 2.96% | 39 |
| Distribution | 2868 | 3944 | 2583 | 2654 | -7.46% | -214 |
| Real estate & business activities | 4326 | 4118 | 4473 | 3728 | -13.82% | -598 |
| Education | 248 | 272 | 220 | 340 | 37.10% | 92 |
| Community & social activities | 629 | 1014 | 996 | 1038 | 65.02% | 409 |
| Total Trafford Park employment | 31,928 | 34,388 | 32,862 | 31,974 | 0.14% | +46 |

Source: ANNUAL BUSINESS ENQUIRY 2006, NOMIS

3.44 The total percentage difference in employment between 2003 and 2006, based on 46 more employees, is 0.14%, a negligible change. The total change in employment is relatively small and does not fully capture the fluctuations in numbers that have been taking place within the sectors. Figure 3.13 shows the employment change in sector more clearly than in table 3.4 by grouping the industry sectors to illustrate increase and decrease in employment.

Figure 3.13 Employment Change in selected sectors in Trafford Park 2003 – 2006



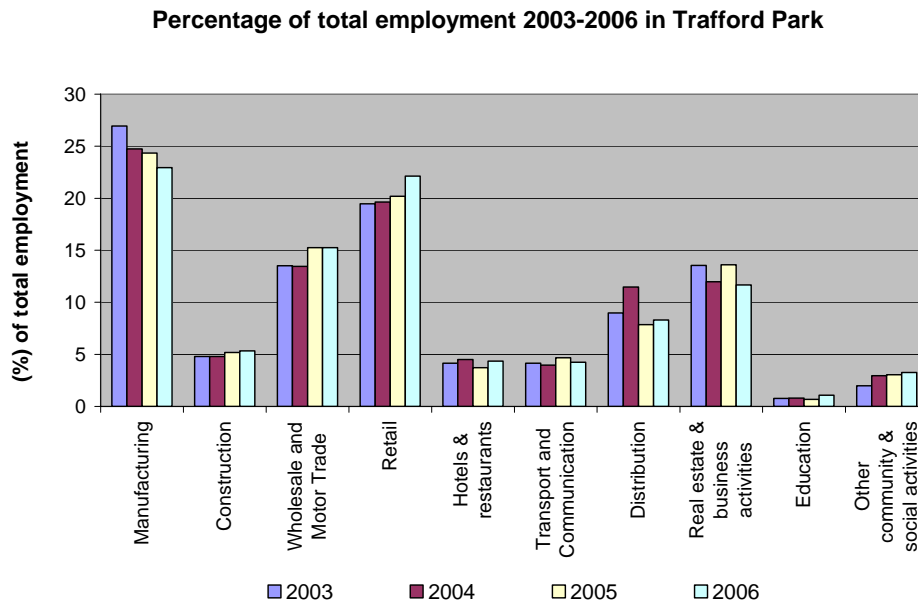
Source: ANNUAL BUSINESS ENQUIRY 2006, NOMIS

3.45 The key features of employment change are:

- **Manufacturing** saw the highest percentage employment decline between 2003 and 2006 with almost a 15% drop in employment, a loss of 1,262 jobs. Although this is line with the long term and the national trend, this continuing erosion of the manufacturing employment base has major implications for future plans for the Park;
- **Retail** experienced a marked increased in employment over the three year period between 2003 and 2006 by nearly 14% which equates to 859 employees.
- **Wholesale also saw significant increases in employment in this period with 558 more people employed in 2006 than in 2003, representing almost a 13% increase.**
- **Real Estate and Business Activity** declined by almost 14% with a loss of 598 jobs. Despite the relatively short time frame, this is still a significant decline and counter to the national trend where employment increased over the period.

3.46 Figure 3.14 shows the above data over time as a percentage of the total Trafford Park economy.

Figure 3.14

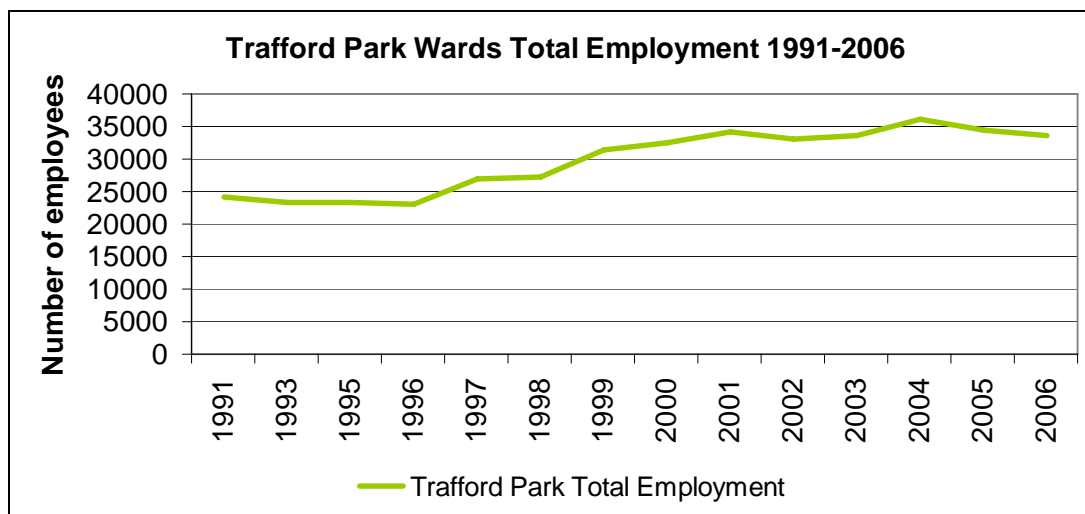


Source: ANNUAL BUSINESS ENQUIRY 2006, NOMIS

3.47 Manufacturing, wholesale and retail have continually had the largest share of the Trafford Park economy with distribution and real estate and business activities both contenders for the fourth largest employment sector over time.

3.48 In order to supplement the findings from ABI for Trafford Park SOAs, figure 3.15 outlines the total employment numbers for Trafford Park wards from 1991 to 2006.

Figure 3.15

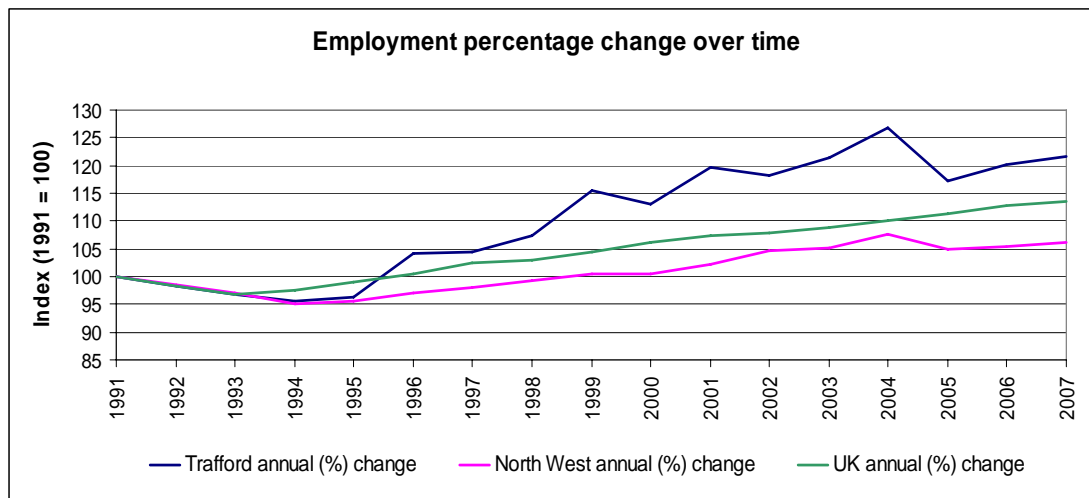


SOURCE: Annual Employment Survey 1991-1997 and Annual Business Survey 1998-2006

3.49 Employment figures in the Trafford Park wards has seen a general growth over the 15 year period. The sharpest increase was a result of sustained growth between 1996 and 2001, with employment increasing from 24,000 to 34,000. There was a large increase between 1998 and 1999 where employment jumped by 4,342 employees, a result of the opening of the Trafford Centre in September 1998.

3.50 Figure 3.16 below set this level of growth in the context of regional and national growth.

Figure 3.16



Source: Greater Manchester Forecasting Model

3.51 Generally, Trafford follows the same employment trends as those seen regionally and nationally which has been to steadily increase from around 1995, although employment growth for Trafford is much greater than the growth seen nationally and much higher than regionally. Trafford has outperformed regional and national growth since 1995 and a steep increase in employment took place from 1998 to 1999 which again coincides with the opening of the Trafford Centre.

Total Business Over Time

3.52 Data for business numbers over time is not available through Greater Manchester Forecasting Model and so only ABI and AES data will be used in this section to identify short-term trends. Table 3.5 presents the data taken from ABI for total business between 2003 and 2006. Like table 3.4 which illustrates the employment data from ABI, table 3.5 gives both the percentage change of businesses by sector as well as the actual numbers in order to quantify the change.

Table 3.5 Total business over time 2003-2006

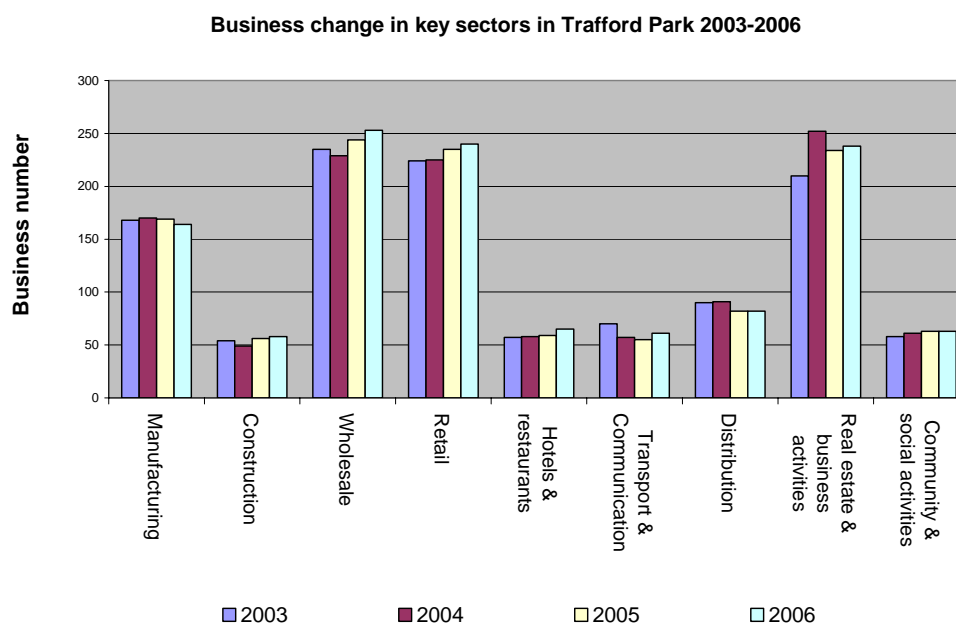
| Sectors | 2003 | 2004 | 2005 | 2006 | % change | Difference |
|------------------------------|-----------|-----------|-----------|-----------|----------|------------|
| Manufacturing | 168 | 170 | 169 | 164 | -2.38% | -4 |
| Construction | 54 | 49 | 56 | 58 | 7.41% | 4 |
| Wholesale | 235 | 229 | 244 | 253 | 7.66% | 18 |
| Retail | 224 | 225 | 235 | 240 | 7.14% | 16 |
| Hotels & restaurants | 57 | 58 | 59 | 65 | 14.04% | 8 |
| Transport & Communication | 70 | 57 | 55 | 61 | -12.86% | -9 |
| Distribution | 90 | 91 | 82 | 82 | -8.89% | -8 |
| Real estate, bus. activities | 210 | 252 | 234 | 238 | 13.33% | 28 |
| Community, social activities | 58 | 61 | 63 | 63 | 8.62% | 5 |
| Total business numbers | 1210 | 1233 | 1235 | 1271 | +4.9% | 61 |
| Total North West business | 229,329 | 232,802 | 242,115 | 247,020 | + 8 % | |
| Total England business | 2,043,329 | 2,067,522 | 2,140,650 | 2,174,794 | + 6 % | |

Source: ANNUAL BUSINESS ENQUIRY 2006, NOMIS

3.53 The total percentage difference in business between 2003 and 2006 according is 61 more businesses which represents nearly a 5% growth over the four year period.

3.54 Figure 3.17 illustrates these fluctuations more clearly than in table 3.5 by grouping the industry sectors to illustrate increase and decrease in business by sector.

Figure 3.17



Source: ANNUAL BUSINESS ENQUIRY 2006, NOMIS

3.55 The largest change in business between 2003-2006 took place in real estate and business activities which saw an additional 28 more business created, which represents over a 13% rise from the 210 businesses in 2003. This is followed by wholesale which saw 18 more businesses between 2003 and 2006, representing an 7.66% growth in this sector.

3.56 Retail saw the third biggest change in business with 7.14% more business from its 2003 total of 224 businesses, resulting in 240 business in 2006.

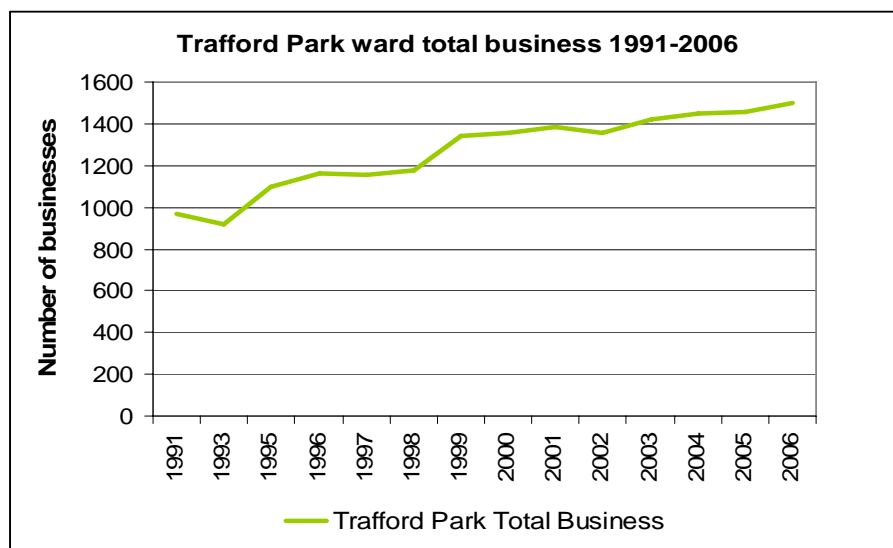
3.57 The sharpest decline between 2003 and 2006 took place in transportation and communication and distribution. Transportation businesses dropped by 12.86% and distribution by 8.89%.

3.58 In terms of business numbers, real estate and business activities has had the second largest share of the Trafford Park economy between 2003 and 2006. The third largest share in 2006 belonged to manufacturing which accounted for 13% of Trafford Park businesses, although nearly a quarter of all employees worked in manufacturing. This means that whilst manufacturing employs a high number of people in Trafford Park, this employment is generated by a relatively low number of businesses.

3.59 The reverse trend can be seen in the real estate and business activities sector where more businesses employ fewer people suggested that businesses in this sector are smaller. This assertion is further explored in the later section on business sizes in Trafford Park.

3.60 Like figure 3.15, figure 3.18 below has been produced to supplement the findings from ABI for Trafford Park Super Output Area business data. Figure 3.18 outlines the total business numbers for Trafford Park wards from 1991 to 1998.

Figure 3.18



Source: Annual Employment Survey 1991-1997 and Annual Business Survey 1998-2006

3.61 Business levels in the Trafford Park wards has seen a general growth over the 15 year period similar to that seen in figure 3.15 showing total employment change over time. The period high growth seen between 1998 and 1999 in employment figures was mirrored by business numbers too. Interestingly however, the period of high growth between 1996 and 1997 seen in employment levels was not seen in business levels. In fact, there were 5 less businesses in Trafford Park wards in 1997 than in 1996 but 3843 more employees. This would suggest that this particular period of growth was not as a result of more businesses opening in Trafford Park but that existing businesses must have experienced a period of growth in employment levels.

Sector Analysis

Introduction

3.62 The previous section provided an analysis of change in employment and business by sector in Trafford Park between 2003 and 2006 as per the Annual Business Inquiry data. For a more in depth analysis of sector trends over a longer time frame, this section refers to both ABI and AES data by Trafford Park wards (Davyhulme East and Park) which is available from 1991 to 2006.

3.63 Up until 1995 the Employment Survey had taken place biannually and so therefore it is only after this point that data is available on annual basis. However despite this, it is still possible to draw out trends over the given time frame.

3.64 To supplement ABI and AES ward data and to give an effective pictorial overview of the sector trends, bubble diagrams have also been produced which allow an examination of the 2006 location quotient (using the UK as a reference economy); the compound growth from 2003-2006 and also the current size of the sector in Trafford Park.

3.65 As has been identified earlier in the chapter, the key sectors in Trafford Park are Business Services; Retail, Wholesale; Distribution and Manufacturing. This section takes a closer look at the trends taking place in these specific sectors and allows greater analysis of those sectors which are growing and declining and which are over or under represented.

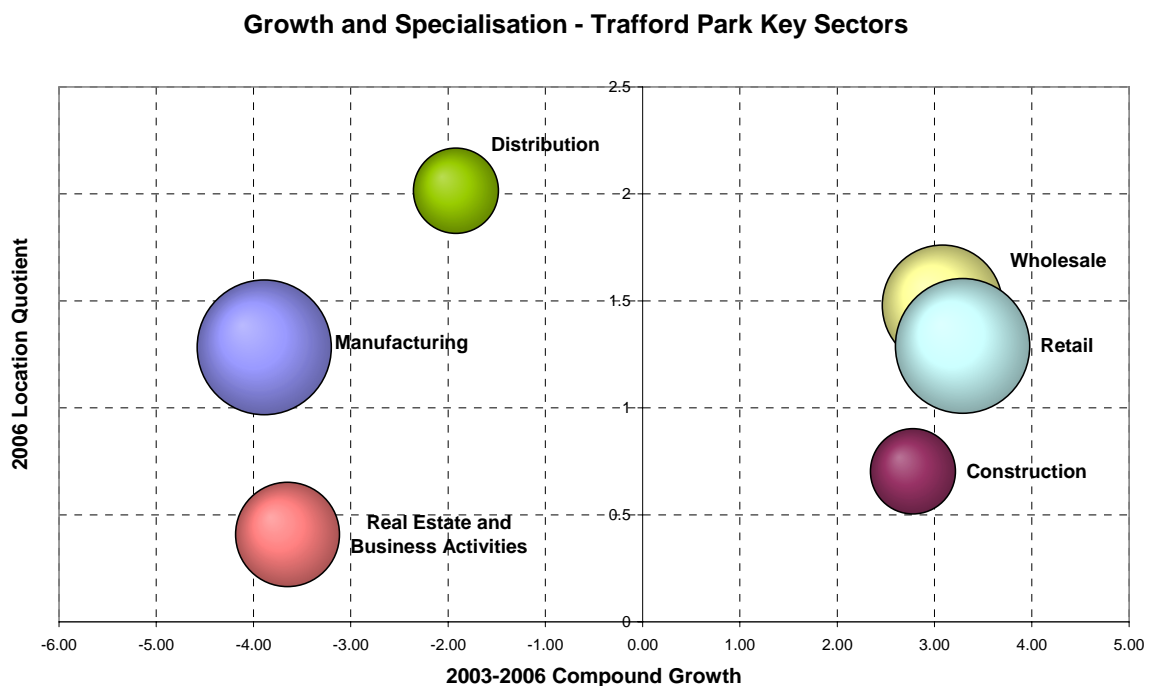
3.66 In order to assess the performance of local sectors over time of each sector against regional and national performance, GMFM data has been used to create graphs showing percentage change in employment. As has been discussed, GMFM data is only available for Trafford on the most local scale. In addition, the sectors available through the GMFM data are not as specific as those available through ABI. However, despite these limitations, this data can still prove useful for an overview of the performance of some of the areas key sectors.

Sector overview

3.67 Figure 3.19 and 3.20 use a Boston diagrams to illustrate three different features of industry sectors in Trafford Park.

3.68 The size of the sector in 2006 is illustrated by the size of the bubble. It also shows the location quotient which is a measure of the concentration of industry in Trafford Park compared to the national average. If this figure is greater than 1 then it is more valuable in terms of numbers of employees to Trafford Park than it is to the UK. The figure on the (y) axis determines how much lower or higher than the national employment level the Trafford Park employment level is. The (x) axis demonstrates the growth seen in each sector between 2003 and 2006.

Figure 3.19

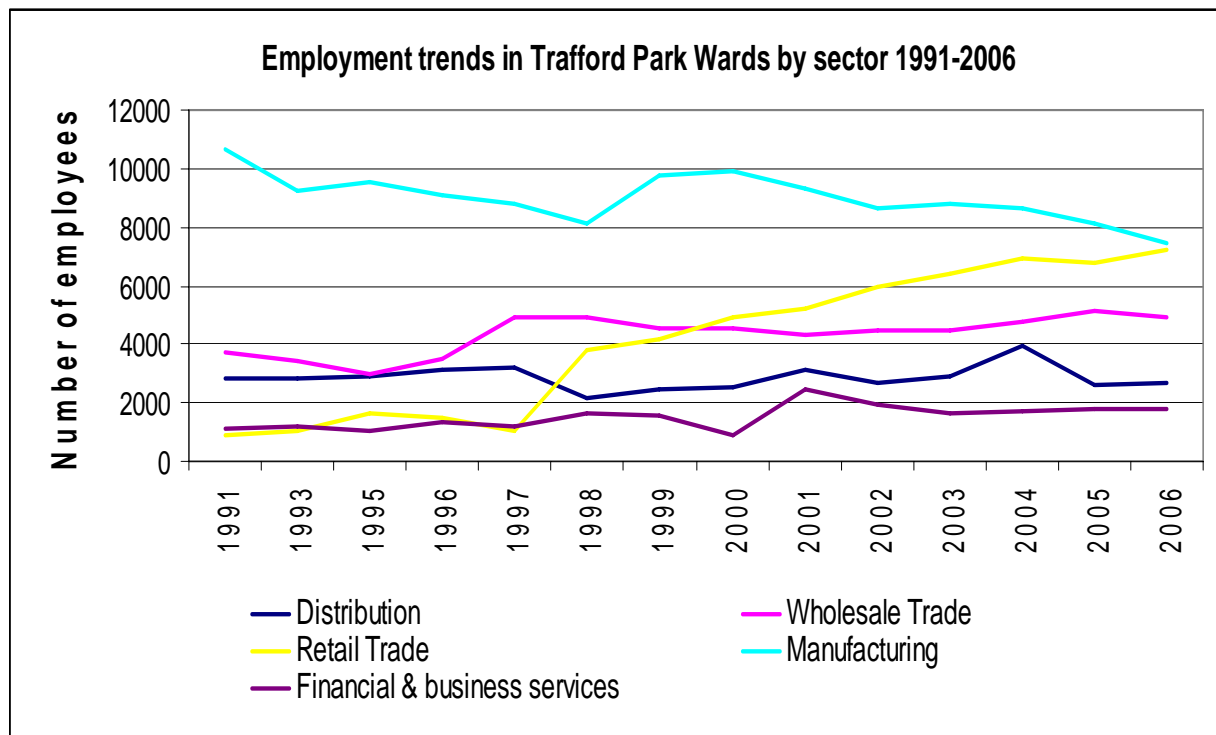


Source: *Annual Business Inquiry, 2006*

3.69 Figure 3.19 shows that in relation to the UK, Trafford has high proportions of distribution and manufacturing, but these sectors have experienced employment decline, and in the former case, the employment loss has been substantial. The Park has high proportion of employment in retail and distribution, and employment has been growing. Construction, although the intensity of employment is lower than average, has also experienced significant growth.

3.70 Figure 3.20 illustrates employment trends for Trafford Park wards by key sector from 1991 - 2006.

Figure: 3.20



Source: AES 1991 - 1997, ABI 1998-2006

3.71 Figure 3.20 illustrates that within this overall increase in employment as seen in figure 3.15 there was considerable change at the sectoral level. It should also be noted that 1991 was the time of the last UK, and most sectors increased employment from the mid 1990s.

3.72 In the 15 year period between 1991 and 2006 the employment balance changed considerably with:

- Manufacturing, where employment accounted for over 50% of all employment in 1991, declined from 11,000 to less than 8,000 employees by 2006
- Retail and wholesale increased employment from 4,000 to 12,000 - a tripling of employment in only 15 years, although the vast majority of employment growth was in retail; (plus 6,000) and
- Real estate and business activities doubled from 2,000 to 4,000 over the period.

3.73 These changes have alerted the character of the Park. In 1991 manufacturing employment dominated with significant distribution activities. By 2006, retail and wholesale was by far the largest sector with other service sectors such as business activities, transport and communications adding to the dominance of the service sector. Manufacturing remains very important, although much less so compared to the 1970s and 1980s.

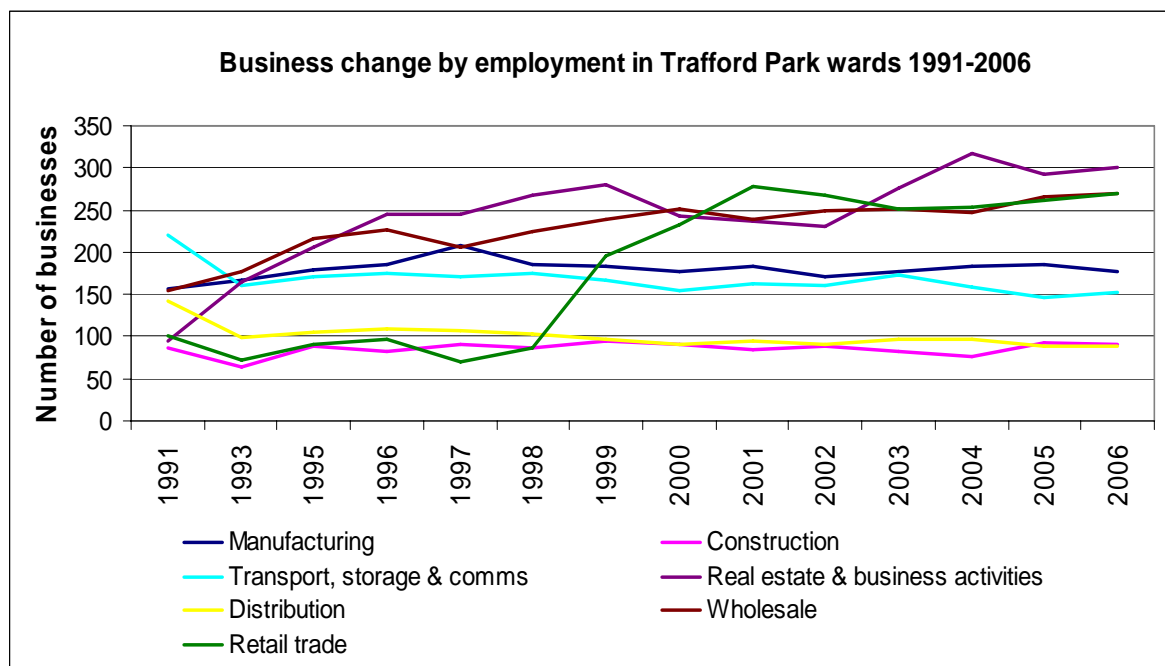
3.74 The sectoral dynamics in Trafford over the last fifteen years closely match those in the national economy with:

- Manufacturing employment decreasing over time, reflects the national economy, with a 30% drop in employment since 1992. In Trafford Park the decline in the 1990s has been less severe than nationally;
- Financial and business services, where the sustained employment increase have driven the national economy, with a doubling of employment;
- Significant growth in retail and wholesale.

3.75 The result has been to further increase the service sector nature of employment in Trafford, in sharp contrast to its historic manufacturing role.

3.76 Figure 3.21 illustrates business trends for Trafford Park wards by key sector during the same period as figure 3.20.

Figure 3.21



Source: AES 1991 - 1997, ABI 1998-2006

3.77 As is the case with the employment figures for Trafford Park wards, the increase in business levels between 1998 and 1999 can be accounted for by the steep growth in the retail trade sector which saw rapid growth from 1998 right through to 2001 with steady growth since then. These figures are likely to have been influenced by the opening of the Trafford Centre.

3.78 Another sector experiencing steep levels of growth is real estate and business activities between 2002 and 2004 which also mirrors the employment figures for this period in figure 3.20.

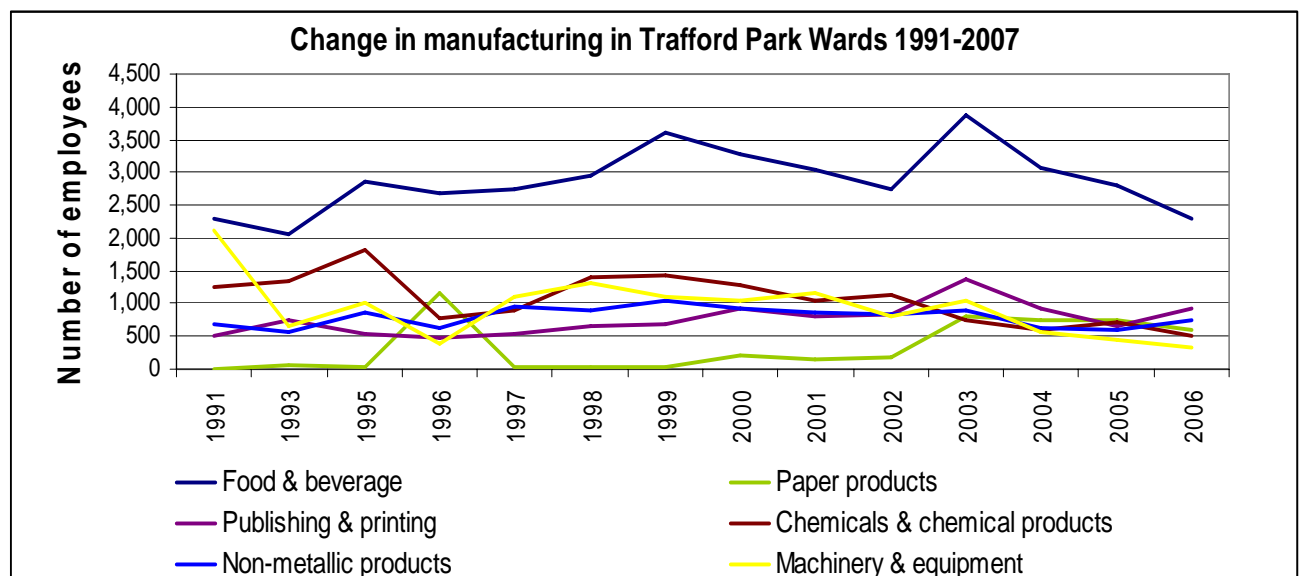
3.79 In terms of slower but continued growth, wholesale and also real estate and business activities have also performed well over the 14 year period. The former saw 115 more business in 2003 than in 1991 which is a 75% increase and the latter saw a 167% increase resulting in 169 more businesses.

3.80 The above dynamic sectors (business services, retail & wholesale) as well as manufacturing and distribution make up the key sectors in Trafford Park. These key sectors have the potential to drive change in the Park whether that's in terms of decline or growth. The following section will look more closely at each of these key sectors.

Manufacturing

3.81 When Trafford Park was established in the 1890's off the back of the development of the Manchester Ship Canal, the primary function was manufacturing industry. This focus on manufacturing lasted until into the 1970s when the country as a whole began to experience a decline in this sector. In 1991, manufacturing represented the largest share of the employment in Trafford but was superseded by business services between 1992 and 1993. Since this point the sector has seen steady decline over the 17 year period and now accounts for less than 15% of the Trafford Economy. This corresponds with trends seen both regionally and nationally. For a more detailed analysis of the recent trends in the manufacturing industry, figure 3.22 illustrates trends for the main manufacturing sectors.

Figure 3.22



Source: AES 1991 - 1997, ABI 1998-2006

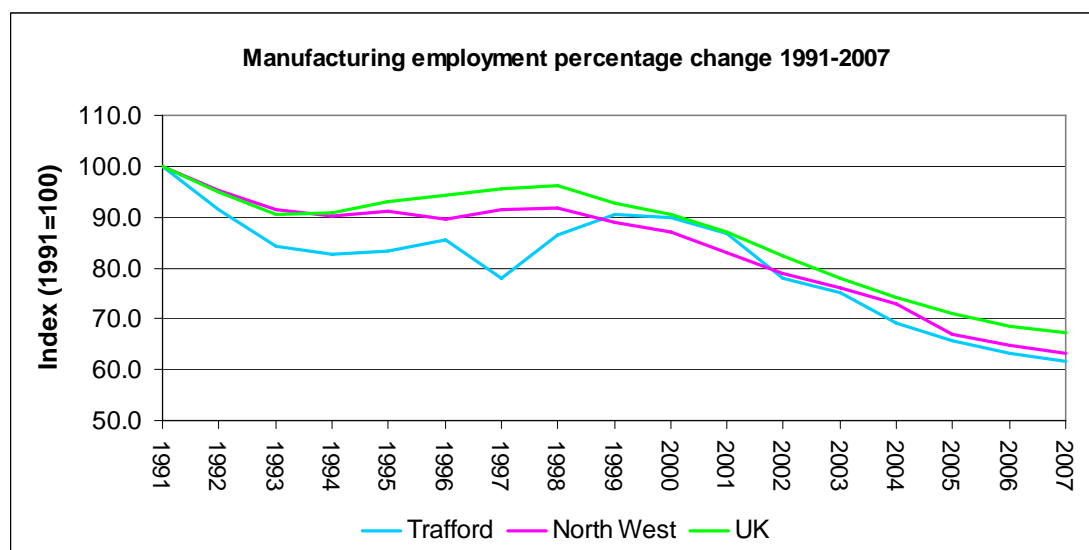
3.82 The largest manufacturing employer in Trafford is food, drink and tobacco which has remained consistently larger than other manufacturing categories over the 15 year period. At its peak in 2003 it employed nearly 4,000 people in Trafford Park wards and in 2006 employs 2,290. Interestingly, food & beverage employment in 2006 is the same as in 1991 and when compared to other manufacturing categories it accounts for a much larger share of the market than any other category. This trend can be accounted for by the presence of several large scale food manufacturers on the Park such as Cargills and Kelloggs which although don't represent a large group of businesses, do employ a large number of people.

3.83 The largest overall decline has been in the manufacturing of machinery and equipment, again in line with national trends. In 1999, this sub sector was the second largest employer in manufacturing and given that at this time, manufacturing was the largest employment sector in Trafford this sub-sector was extremely valuable Source of employment. Over the 17 year period, employment in this sub-sector dropped by 2,800 jobs.

3.84 One of the few positive trends in the manufacture sector can be seen in pulp, paper and printing. Despite seeing a slow decline over the past four years is one of the few sub-sectors which employs more people in 2007 than in 1991. There are 600 more jobs in pulp, paper and printing that there were in 1991. This may be due to the fact that this type of manufacturing supports many buoyant sectors as part of a supply chain, most notably business services which is the largest employer in Trafford Park. However, predicted decline in the printing industry nationally and the planned redundancies at Trafford Park Printers may well influence these figures negatively.

3.85 Figure 3.23 allows the trends for manufacturing in Trafford to be compared those trends taking place regionally and nationally by illustrating the percentage change over time.

Figure 3.23

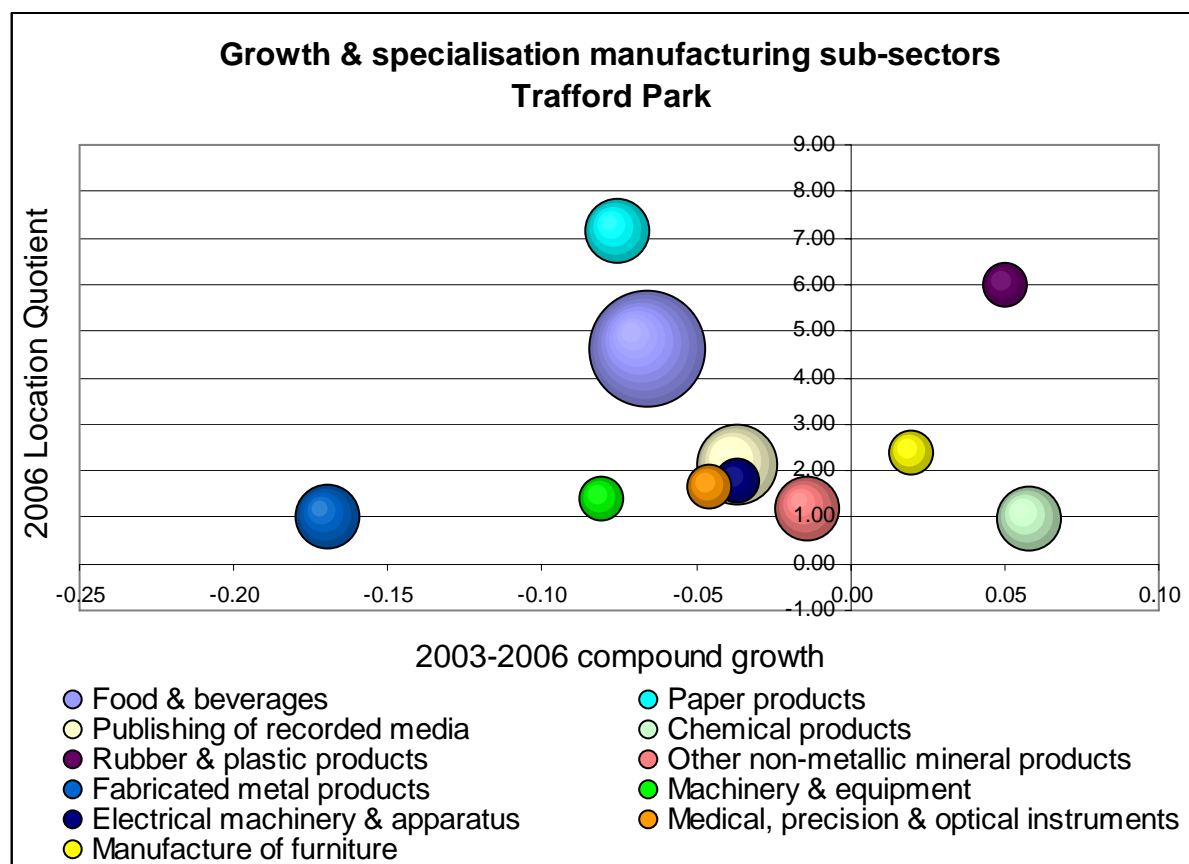


Source: Greater Manchester Forecasting Model

3.86 The manufacturing employment trends in Trafford follow the same trends taking place in the North West and UK apart from a period of time during the mid to late 1990s. Between 1996 and 1997 there was a sharp drop in the manufacturing employment figures which was particular to Trafford and not mirrored on a national or regional level. This drop was followed by a sharp rise from 1997 to 1999 when manufacturing employment in Trafford overtook manufacturing employment figures for the North West. Following this however, manufacturing across the region and nationally began a steady decline to current figures which stands at around 10% of total employment locally, regionally and nationally.

3.87 Figure 3.24 breaks manufacturing down into 2 digit SIC ('Standard Industry Classification') codes in order to see what types of manufacturing are the most dynamic and also compare trends with what's taking place nationally.

Figure 3.24



Source: *Annual Business Inquiry, 2006*

3.88 As has been seen above food and beverage manufacturing represents the largest manufacturing sub-sector in Trafford Park and like most manufacturing is ahead of the UK in terms of percentage of total employment according to the location quotient.

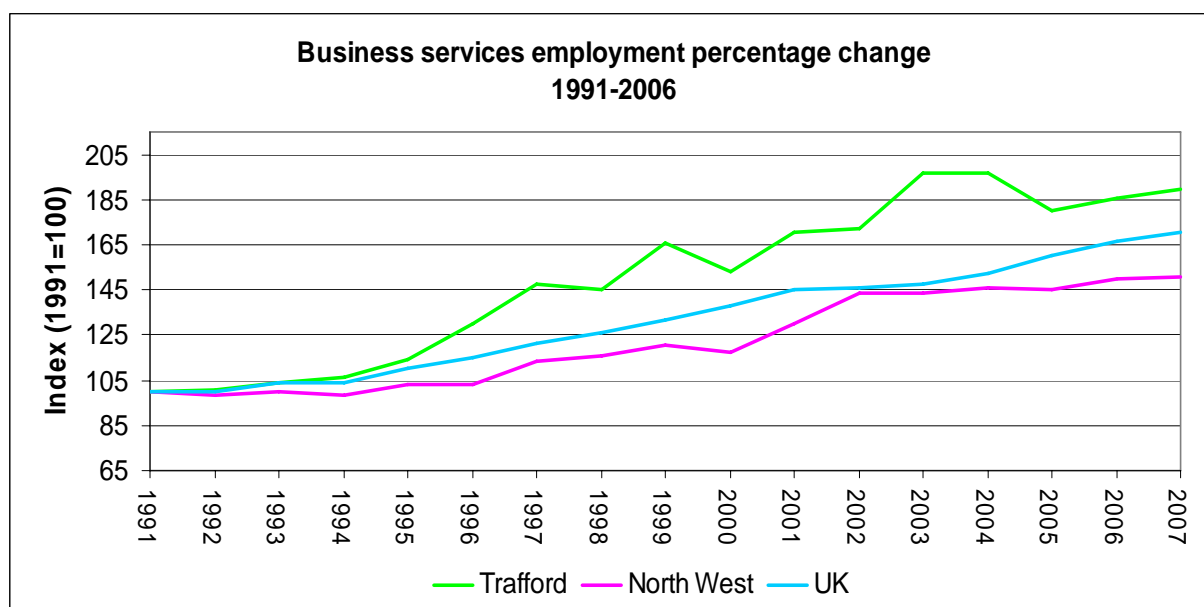
3.89 Sub-sectors experiencing high growth between 2003 and 2006 include the manufacture of chemical products, rubber and plastic products and furniture, although relatively speaking they don't represent a large percentage of total employment on the Park.

Business Services

3.90 According to figures 3.20 and 3.21 one of the most dynamic employment and business trends has taken place in the business services sector. It began as only the third largest employer in Trafford Park but has steadily increased to become the largest employer in Trafford.

3.91 Similar to manufacturing in figure 3.23, figure 3.25 allows the trends for Business Services employment in Trafford to be compared those trends taking place regionally and nationally by illustrating the percentage change over time.

Figure 3.25



Source: Greater Manchester Forecasting Model

3.92 The actual value of the increase in employment is 16,000 more jobs in the business services sector in 2007 than in 1991 which represents a 44% increase. This is inline with the overall regional and national growth of this sector and also reflects the recent investment into office development at the periphery of the Park. A large proportion of this growth in employment was located elsewhere in Trafford.

3.93 Unlike figures for manufacturing in Trafford, business services shows differing past trends to what has taken place in the North West and UK. Although the period between 2005 and 2007 shows similar steady growth, Trafford growth is at a higher percentage level than that taking place regionally and nationally. The most striking difference is between the years

2000 and 2004 where business services employment in Trafford thrived but nationally the sector remained relatively inactive.

3.94 For a more detailed look at the trends in this key sector, table 3.6 illustrates data taken from ABI and AES on a ward level. It drills down to a 2 digit sic code to allow for analysis of the business services sub-sectors which are driving it's growth in Trafford Park.

Table 3.6: Employment in Business Services sub-sectors in Trafford Park wards over time

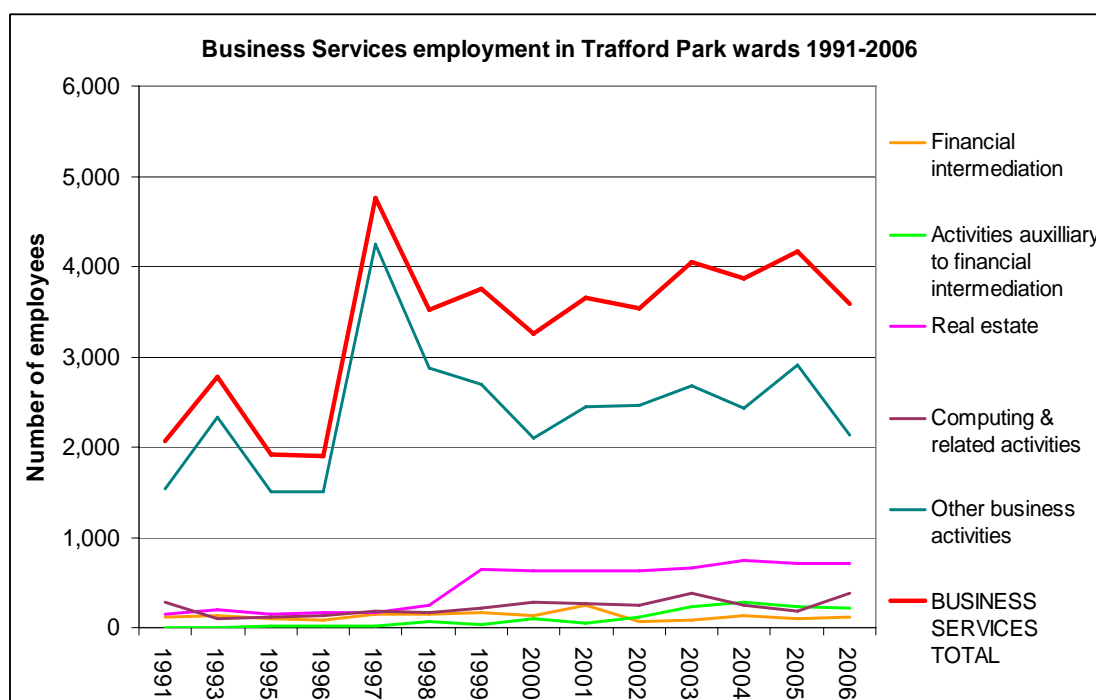
| Date | Financial intermediation | Activities auxiliary to financial intermediation | Real estate | Computing & related activities | Research & development | Other business activities | Total |
|------|-----------------------------|--------------------------------------------------------|----------------|--------------------------------------|---------------------------|---------------------------------|-------|
| 1991 | 109 | 0 | 142 | 277 | 0 | 1,543 | 2,070 |
| 1993 | 133 | 1 | 200 | 105 | 0 | 2,337 | 2,777 |
| 1995 | 95 | 10 | 147 | 108 | 4 | 1,499 | 1,918 |
| 1996 | 84 | 12 | 160 | 130 | 1 | 1,507 | 1,899 |
| 1997 | 145 | 17 | 166 | 175 | 14 | 4,241 | 4,765 |
| 1998 | 155 | 62 | 246 | 164 | 26 | 2,873 | 3,526 |
| 1999 | 163 | 38 | 643 | 209 | 16 | 2,690 | 3,759 |
| 2000 | 124 | 96 | 622 | 287 | 20 | 2,105 | 3,254 |
| 2001 | 244 | 57 | 629 | 258 | 19 | 2,443 | 3,650 |
| 2002 | 62 | 119 | 635 | 241 | 21 | 2,465 | 3,543 |
| 2003 | 83 | 235 | 659 | 374 | 23 | 2,676 | 4,050 |
| 2004 | 136 | 274 | 748 | 251 | 37 | 2,428 | 3,874 |
| 2005 | 98 | 238 | 716 | 181 | 29 | 2,906 | 4,168 |
| 2006 | 113 | 223 | 715 | 383 | 18 | 2,130 | 3,582 |

Source: AES 1991 - 1997, ABI 1998-2006

3.95 The largest sub-sector in Business Services is 'Other Business Activities' (sic code 74). This includes the following activities; legal, accounting, book-keeping and auditing activities; tax consultancy; market research and public opinion polling; business and management consultancy; holdings.

3.96 Figure 3.26 demonstrates the above figures in graph format to allow for easier interpretation.

Figure 3.26



Source: AES 1991 - 1997, ABI 1998-2006

3.97 The most striking trend takes place in other business activities in 1997 where the number of employees dramatically increases. Because of the wide ranging nature of this sub-sector it is difficult the pin-point the exact driver for this sudden growth and subsequent decline. However, one likely explanation would be the creation of temporary clerical jobs relating to some kind of development or business activity on the Park.

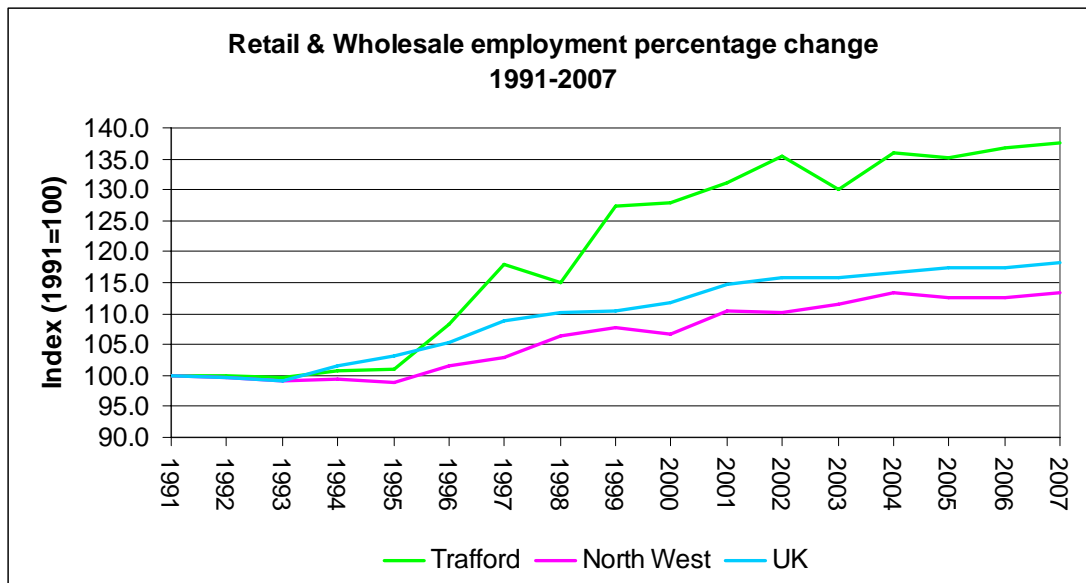
3.98 The next largest sub-sector is real estate which covers both residential and commercial real estate activity but given the nature of the Park it is likely that the driver for employment in this sub-sector is commercial property activity.

3.99 In 2006, there were over 3,500 people employed in business services in Trafford Park with 34,000 people employed in business services in Trafford. This means that Trafford Park accounts for approximately 10% of the Borough's business services employment. This suggests that Trafford Park is not a strong location for business services sector compared to the Borough.

Retail & Wholesale

3.100 Figure 3.27 compares the change in employment figures for Trafford in retail and wholesale with figures for the North West and UK. GMFM, the data source for figure 3.27 groups retail, wholesale & distribution together but separately they each represent a large proportion of Trafford Park and also Trafford employment as can be seen in figures 3.19 and 3.20.

Figure 3.27



Source: Greater Manchester Forecasting Model

3.101 Retail, wholesale & distribution represented the second largest sector in Trafford in 2007 after business services. It was overtaken by business services as the second largest employment sector between 1992 and 1993. The steepest increase in employment in retail and wholesale took place between 1998 and 1999 which reflects the opening of the Trafford Centre in 1998. There are also several large retail centres within Trafford which will also have an impact on these figures such as Altrincham, Sale and Stretford. However, in terms of retail hierarchy, the Trafford Centre is classed as a regional centre and so data for Trafford relating to this sub-sector will most likely be influenced mainly by the presence of the Trafford Centre. According to Hoovers data (see table 3.5) there were 138 retail businesses in Trafford Park in 2008, representing 15% of total employment in the study area.

3.102 As well as the presence of a regional shopping centre, Trafford Park also has a significant supply of wholesale businesses. According to Hoovers, there are currently 133 businesses in Trafford Park operating in the wholesale sub-sector which represents almost 15% of the total employment in the Park. This means that the wholesale & retail sector as a whole currently represents approximately 30% of the total employment in Trafford Park according to the most recent data referred to in this study.

3.103 As in figure 3.17, the opening of the Trafford Centre in 1998 has had a marked influence on the retail and wholesale figures for Trafford. However, figure 3.18 illustrates how this growth was to a greater degree in Trafford than what has taken place on a regional and national level from this point. Although retail and wholesale employment has seen steady growth across the UK since 1995, growth in Trafford has inclined at a much quicker rate.

Employment in the retail and wholesale sector in 2007 nearly 20% in Trafford but was 17% across the north west and 16% nationally.

Distribution

3.104 For an illustration of how distribution performs as a separate sector to retail and wholesale refer to figures 3.20 and 3.21 earlier in this section. In terms of employment, distribution employs the fourth highest amount of people in the Park. However, when referring to the Land Use and Character Area plan in Chapter 5 of this study, it is evident to a large proportion of land is given over to transportation and distribution in the Park. It far outweighs 'shopping' and 'office' uses in terms of square footage allocated to the sector.

3.105 However, this observation should be caveated by explaining that the Land Use and Character Area plan was constructed by carrying out site visits on the Park to identify the actual activities of the business, rather than formally identifying the exact sector function of the business concerned. Therefore, large scale retailers, wholesalers or manufacturers with a small distribution function such as Argos or Cargills have been allocated as having a transportation or distribution function in terms of their land use rather than having a retail or manufacturing sector allocation.

3.106 The on site observations recorded in chapter 5 combined with the data presented here, suggests that Distribution played and still does play an important role in the economy of the Park. In 2006, distribution employed 2663 people which is slightly down on figures in 1991. However, despite the lack of growth in this sector it has performed steadily over the 14 year period as seen in figure 3.20.

Business Size

3.107 This section examines the size of business located in Trafford Park compared to those in Trafford, the North West and England and Wales to assist with building an accurate profile of the types of business operating in the study area. When this data is analysed over time, it also helps to give overview of any trends taking place in terms of the size of business in the Park. Tables 3.22 and 3.23 show the business and employee numbers for Trafford Park by size. According to the ABI data, business are classed in the following way according to their size:

| | |
|----------------|--------------------|
| Micro business | 1 - 10 employees |
| Small business | 11 - 49 employees |
| Mediumbusiness | 50 - 199 employees |
| Large business | 200+ employees |

Business size by number of business units

3.108 Tables 3.7 and 3.8 illustrate the business size data as a percentage of the total business numbers for each geographical area.

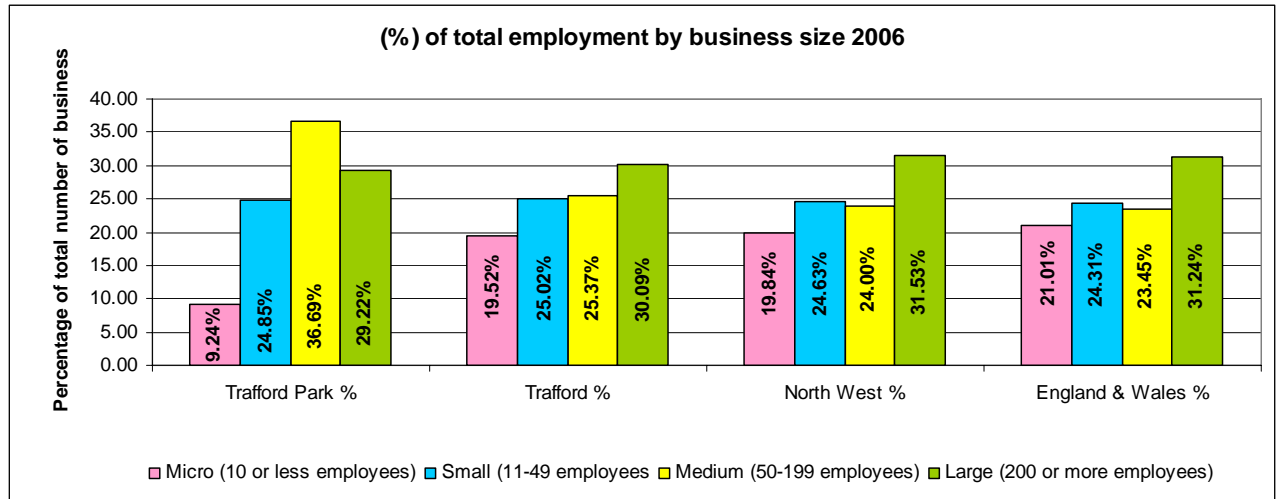
| Table 3.7 Business size by business 2006 | | | | |
|----------------------------------------------------|-------|-------|--------|-------|
| | Micro | Small | Medium | Large |
| TPk Business No. | 770 | 339 | 118 | 26 |
| Trafford Park % | 62% | 27% | 9% | 2% |
| Trafford % | 84% | 12% | 3% | 1% |
| North West % | 83% | 13% | 3% | 1% |
| England & Wales % | 85% | 12% | 3% | 1% |
| <i>Source: ANNUAL BUSINESS ENQUIRY 2006, NOMIS</i> | | | | |

3.109 The most distinctive feature of the business base in Trafford Park is the importance of medium sized companies. Although there are 770 micro businesses, medium sized companies account for 37% of employment. This indicates that despite national trends, there is less capacity for smaller business units on Trafford Park compared to other areas. Table 3.7 illustrates Trafford Park employment numbers by business size in 2006 and also gives these figures as a percentage of total Trafford Park businesses. In addition, it provides business size as a percentage of total business for Trafford, the North West and England and Wales.

| Table 3.8 Business size by employment | | | | |
|----------------------------------------------------|-------|-------|--------|-------|
| | Micro | Small | Medium | Large |
| TPk Employment | 2,955 | 7,946 | 11,730 | 9,342 |
| Trafford Park % | 9% | 25% | 37% | 29% |
| Trafford % | 20% | 25% | 25% | 30% |
| North West % | 20% | 25% | 24% | 32% |
| England & Wales % | 21% | 24% | 23% | 31% |
| <i>Source: ANNUAL BUSINESS ENQUIRY 2006, NOMIS</i> | | | | |

3.110 Figure 3.28 illustrates these figures more clearly for easy comparison between the geographical areas.

Figure 3.28



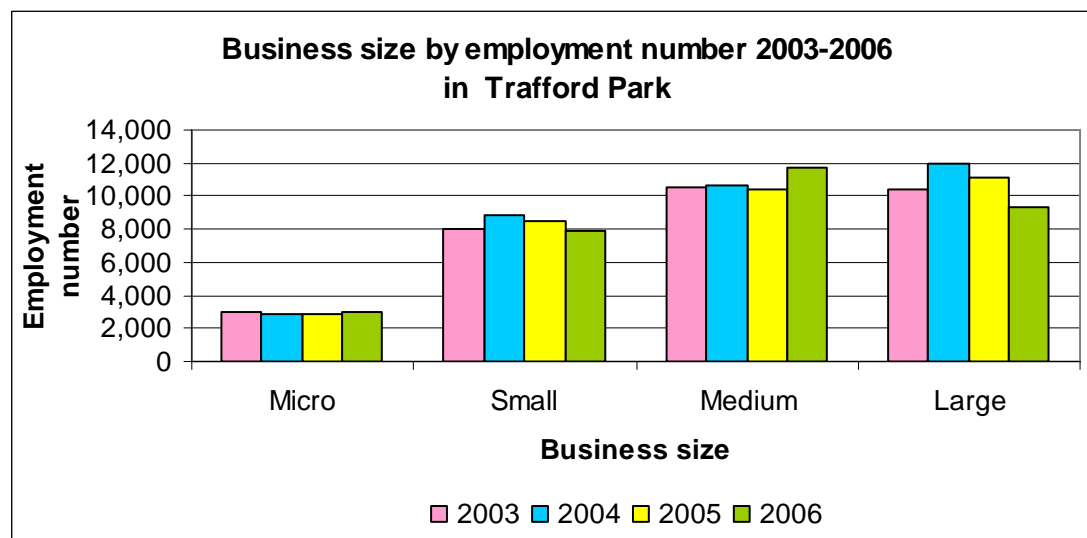
Source: ANNUAL BUSINESS ENQUIRY 2006, NOMIS

3.111 Despite the majority of businesses in Trafford Park being micro businesses, most people are employed in medium sized businesses in the study area. This is in contrast to local, regional and national trends where the majority of people are employed in large businesses.

Business Size by Employee and Business Over Time

3.112 Figures 3.29 examines the short-term trends for business size by employment numbers in Trafford Park.

Figure 3.29

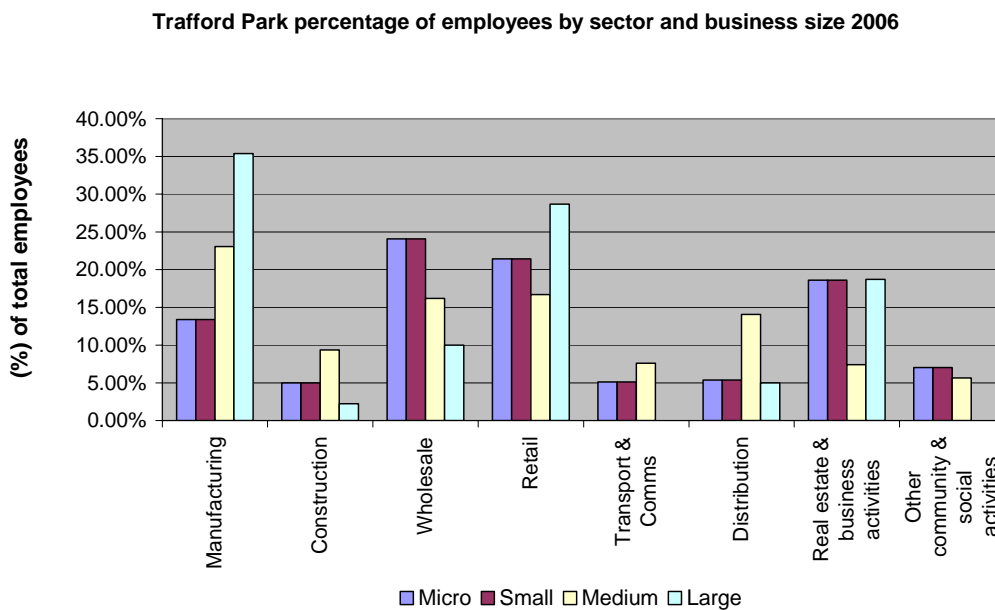


Source: ANNUAL BUSINESS ENQUIRY 2006, NOMIS

3.113 Despite the short date range in figure 3.29, some trends can be identified. There has been a significant drop in the number of people employed in large businesses between 2004 and 2006 which mirrors the trend with small businesses. Medium sized businesses saw a significant rise between 2005 and 2006 with employment in this category rising by 1,339 , an 11% rise.

3.114 Figure 3.30 breaks down the business size data further by illustrating the size and sector of businesses in Trafford Park in 2006.

Figure 3.30



Source: ANNUAL BUSINESS ENQUIRY 2006, NOMIS

3.115 The largest share of micro businesses are in the retail and wholesale sector, followed by real estate and business activities. This is unsurprising although it is interesting to note that retail and wholesale also has the largest share of large businesses. The reason for this could be attributed to the broad range of businesses in the sector which could range from small independent retailers to large scale supply chain retailers or wholesalers.

3.116 The most striking result is the majority of manufacturing businesses are classed as large. This shows that many of the manufacturing businesses in Trafford Park still rely on a relatively large labour force to support them.

3.117 Another interesting trend can be seen in real estate and business activities where the majority of businesses are either micro or large businesses. It would be expected in most

sectors for there to be a trend for businesses to smaller or larger but again, this could be an indication of the broad range of business functions within this sector.

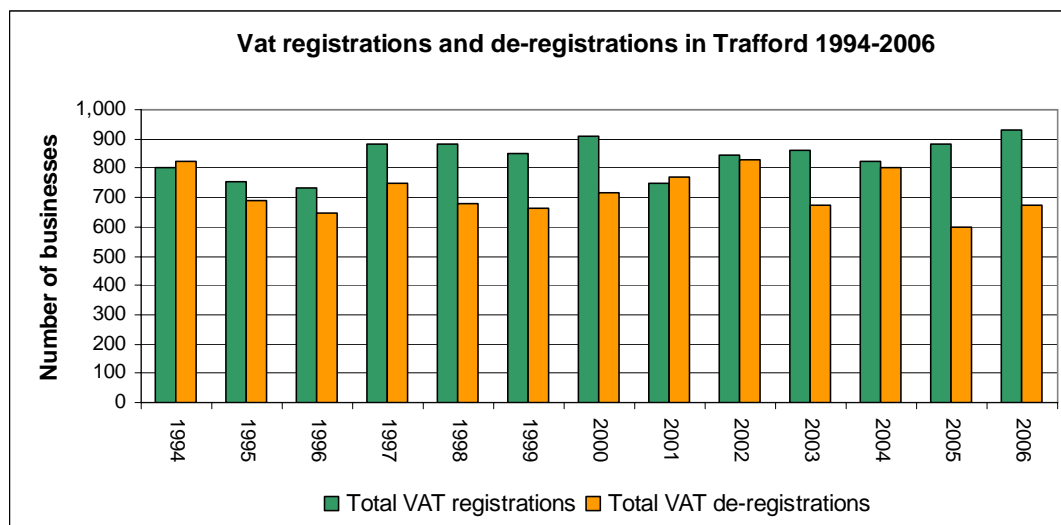
3.118 A potential risk of the reliance medium to large businesses on the Park would be it's vulnerability to the decline of this types of businesses. A more sustainable mix of all sizes of businesses would be the ideal scenario.

Business Change

3.119 Business change can be measured by looking at VAT registrations and de-registrations in an area which can be a reflection of enterprise and entrepreneurship in an area. VAT registration data available from Nomis gives series data from 1994 through to 2006 which enables trends to be drawn out in terms of the levels of enterprise and investment. Unlike ABI and AES, the data is only available for Trafford at the most localised level and is only available for industry sections rather than individual sic codes.

3.120 Total VAT registration and de-registration trends are illustrated in figure 3.31 below.

Figure 3.31



Source: VAT REG / DE-REG DATA, NOMIS

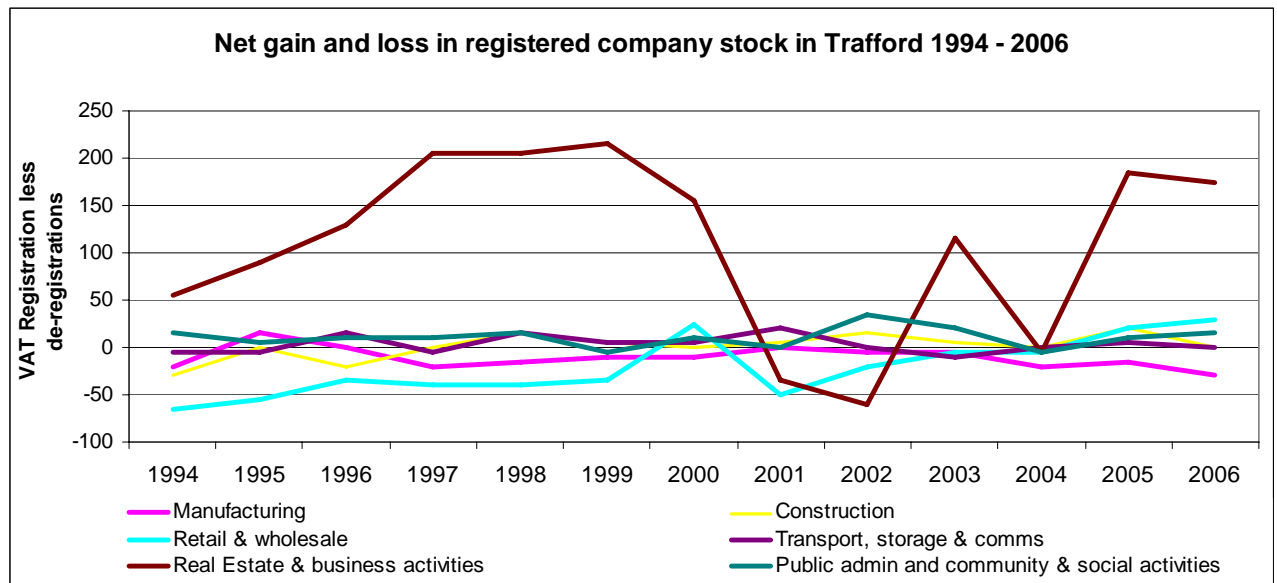
3.121 In Trafford, VAT registrations continually out-number de-registrations apart from in 1994 and 2001. Registrations have risen year on year since 2004 and for the last two years, the gap between registrations and de-registrations has been at it's widest for twelve years with 285 more businesses opening than closing in 2005.

3.122 The trends in Trafford are slightly different to what was taking place regionally and nationally although both figures for England and Wales and the North West show that de-registrations outnumbered registrations in 1994 mirroring what took place in Trafford in this year.

3.123 However, the trend in 2001 for higher de-registrations did not take place nationally or regionally which would suggest that localised micro-economic forces influenced this rather than macro-economic forces which may well have been the case in the mid-1990s.

3.124 Figure 3.32 shows the net gain or loss in the stock of registered enterprises each year. This is equal to VAT registrations less de-registrations.

Figure 3.32



Source: VAT REG / DE-REG DATA, NOMIS

3.125 Real Estate consistently appears as the most dynamic sector over the 12 year period in terms of VAT Registrations with 175 more VAT registrations than de-registrations in 2006. This breaks down to 445 VAT registrations as opposed to 270. However, it is also the most unstable sector with the largest inclines and declines in net change. The fact that real estate is included in this sector may account for this instability. The UK property market boom in the mid to late 1990s will have had an impact on this sector and between 1996 and 1999 the number of business start ups in this sector grew sharply and remained consistently higher than business closures. However, real estate is just an element of this large sector and so the property boom may not be able to account for the peaks and troughs in VAT registrations in following years.

3.126 Another sector which appears quite active is retail and wholesale. Interestingly, during the period between 1998 and 1999 when the Trafford Centre opened, figure 3.31 does not display a growth in VAT registrations and net change appears low. This could be that although retail numbers increased when the Trafford Centre opened, that this had a knock-on effect on retail closures around Trafford, hence little net change in this sector. However,

during the following year, VAT registrations exceeded de-registrations by 25. Following another steep net-change where business closures were prevalent in 2001, retail and wholesale has seen a steady incline in VAT registrations over de-registrations.

Economic Transformation

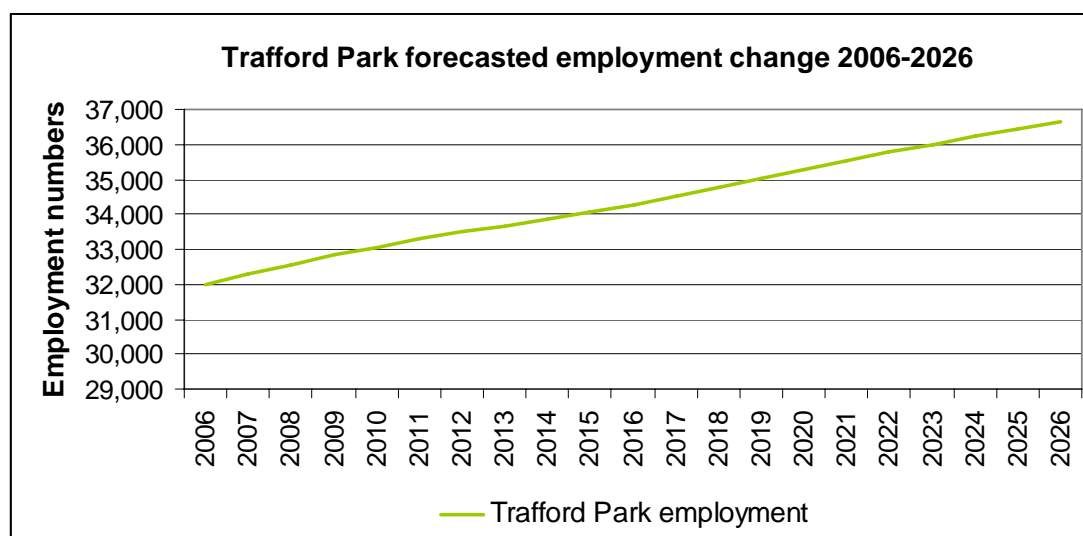
3.127 This section examines data available from GM Forecasting Model and identifies trends for future total employment, future key sectors and future GVA in Trafford. In addition, GMFM percentage increase predictions have been applied to Trafford Park ward figures for 2006 to provide an approximate idea of the growth expected on a more local level than is available for GMFM.

3.128 In light of the recent changes in the macro-economic climate a 'lower growth' scenario has been developed by AGMA since the publication of GMFM data in 2007. This scenario is not a full model update and has no data relating to sector trends, and was developed with the intention of giving a basic understanding of the main negative economic impacts in the face of a growing economic crisis. It has been recommended that the available lower growth figures should not be used in place of the base forecasts which are provided annually and take into account all newly available datasets and local intelligence. Therefore, although the current weaknesses in the economy can be acknowledged, the GMFM data is still the most comprehensive forecasting data available for this kind of forecasting.

Employment Changes in Trafford Park Wards

3.129 Figure 3.33 illustrates the forecasted change in employment in Trafford Wards by taking the GMFM forecasted percentage increases in employment levels year on year and applying them to the ABI 2006 base figure.

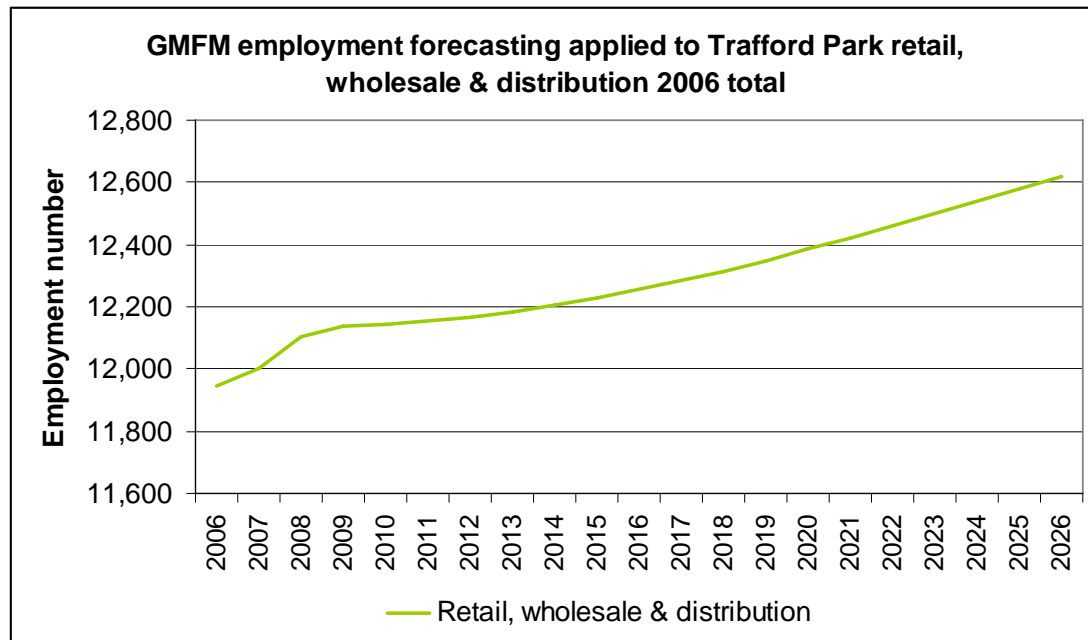
Figure 3.33



SOURCE: Greater Manchester Forecasting Model 2007 and ABI 2006

3.130 Figure 3.33 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.

Figure 3.34



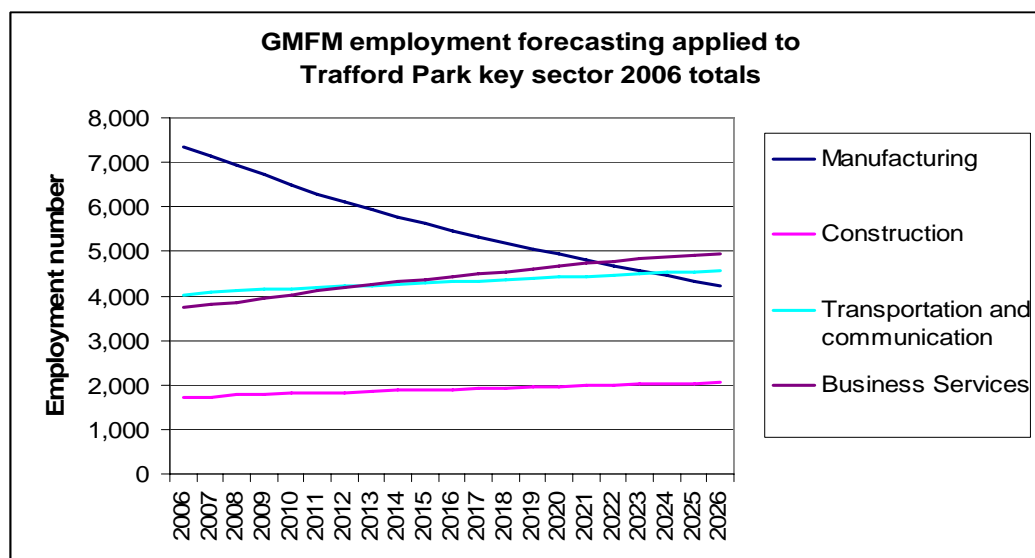
SOURCE: Greater Manchester Forecasting Model 2007 and ABI 2006

3.131 Figure 3.34 uses the same technique as in figure 3.33 to examine the predicted growth in retail, wholesale and distribution.

3.132 As is evident this sector is expected to grow at a rapid rate. Because GMFM is not available for retail, wholesale and distribution as separate sectors the figure is unable to identify the key driver for this growth. However, given the patterns of previous data seen in this chapter it is likely that the key driver will be in the retail sector.

3.133 Like figure 3.34, figure 3.35 uses the above technique to predict approximate growth in the other key sectors in Trafford Park wards.

Figure 3.35



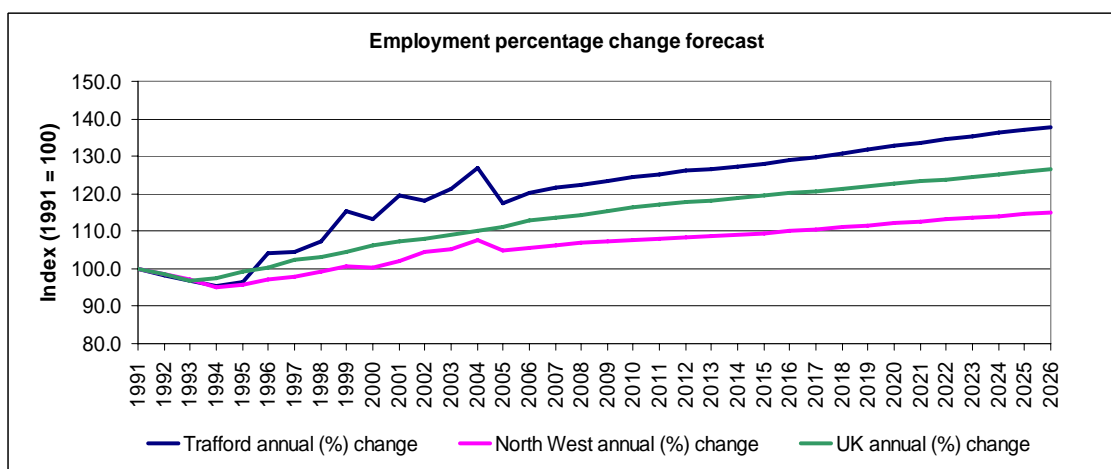
SOURCE: Greater Manchester Forecasting Model 2007 and ABI 2006

3.134 If trends follow the forecasted percentage change, manufacturing is predicted to decline steadily over the 21 year period, with the other key sectors seeing slight growth. A comparison of how these changes compare to those predicted on a regional and national level can be seen in the section below.

Employment Forecasts in Trafford

3.135 Figure 3.36 illustrates the predicted trends for employment levels in Trafford against trends in the North West and UK.

Figure 3.36



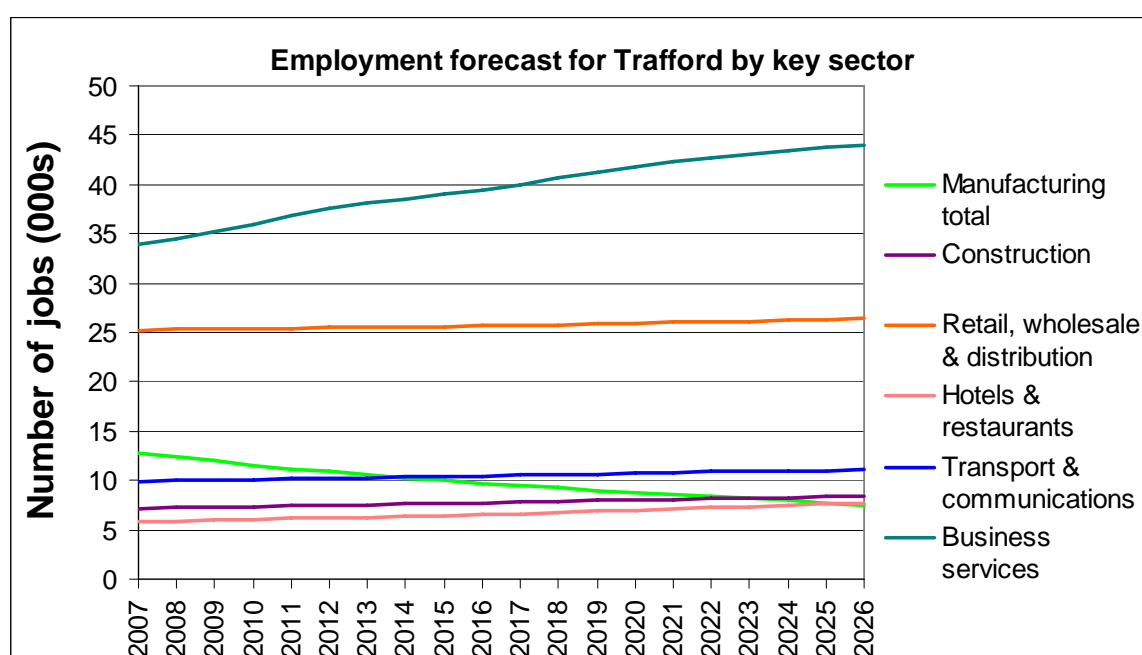
Source: Greater Manchester Forecasting Model

3.136 As is illustrated in figure 3.36, employment is predicted to steadily rise across the UK including Trafford. As has been mentioned, these trends may fluctuate, depending on the development of the current economic crisis although using the best available data at the time, a general increase has been predicted.

Employment by sector in Trafford

3.137 Figure 3.37 identifies what GMFM suggests are going to be the largest employers in Trafford post 2007.

Figure 3.37



Source: Greater Manchester Forecasting Model

3.138 The only high growth sector in Trafford Park according to GM Forecasting Model is business services. This sector can be broken down into the following categories:

- Real estate activities
- Renting of machinery and equipment without operator and of personal and household goods
- Computer and related activities
- Research and development
- Other business activities (includes finance, architecture, engineering, recruitment, advertising among others).

3.139 Business and professional services has also been identified as one of the North West Regional Economic Strategy (RES) priority sectors.

3.140 The other priority sectors as identified by the RES are as follows:

- Biomedical: biotechnology, pharmaceuticals and medical devices
- Energy and Environmental Technologies
- Advanced Engineering and Materials: Chemicals, Aerospace, Automotive
- Advanced Flexible Materials
- Food and Drink
- Digital and Creative Industries

3.141 These sectors have been identified as a priority in the Regional Economic Strategy because they have a high knowledge base, are widely traded on the markets and there is good potential for international growth. The above priority sectors are represented in Trafford but not to a great extent (with the exception of Food and drink) and without intervention, are not predicted to grow according to GM Forecasting. There is strong growth forecasts for digital and creative industries, and given Trafford's proximity to Manchester and MediaCity in Salford, there may be potential to capture investment and employment.

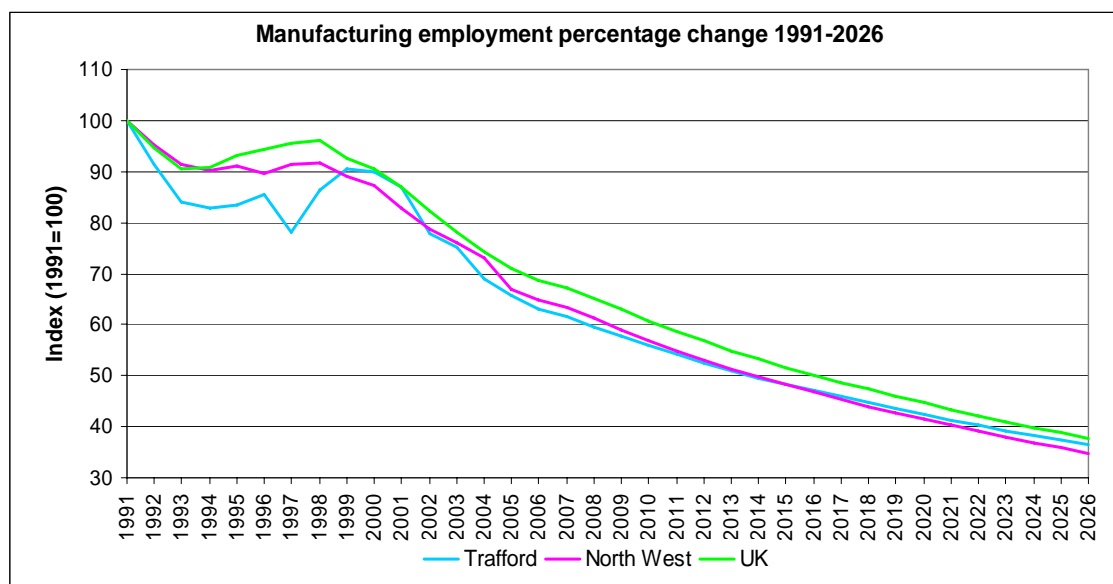
3.142 Given the recommendations in the RES, it would seem that following the predicted continual decline in manufacturing there is an over representation of both business services and also retail, wholesale & distribution. Given that business services has been identified as a priority by the RES its future development can be viewed as positive for Trafford, and to a lesser degree for the Park. However, an over reliance on retail and wholesale, which in 2026 is predicted to account for only 18.5% of total employment, could be considered unsustainable in the longer term.

Sector forecast comparisons

3.143 In order to put the above trends into context the following section compares forecasted employment levels for Trafford with forecasted levels for the North West and UK.

3.144 Figure 3.38 takes the percentage change forecast for manufacturing and compares it with what is predicted to take place regionally and nationally.

Figure 3.38

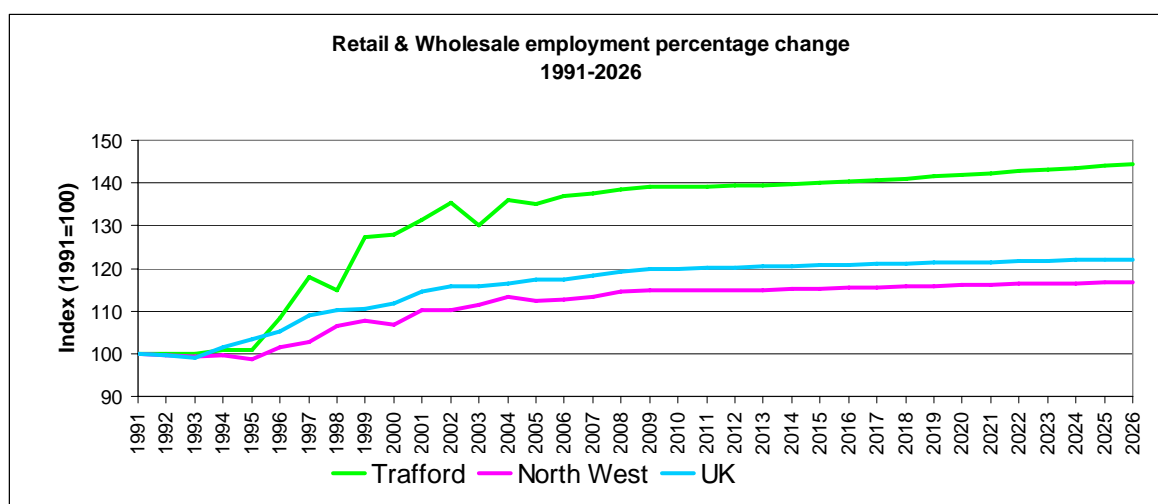


Source: Greater Manchester Forecasting Model

3.145 The decline in manufacturing being predicted for Trafford as in figure 3.38 and figure 3.37 mirrors the trends taking place in the North West and UK. A positive thing to note is that the decline seen in Trafford is not predicted to be as pronounced as that seen elsewhere. This could be due to the types of manufacture found in Trafford Park which tend to be part of the supply chain for more buoyant sectors. The two largest manufacturing categories in Trafford Park are food drink and tobacco followed by pulp, paper and printing (see figure 3.22). Both these commodities play a vital part in some of the UK's growing sectors such as retail and business services.

3.146 Figure 3.39 illustrates forecasted percentage change for the retail and wholesale sector compared with the UK and North West.

Figure 3.39

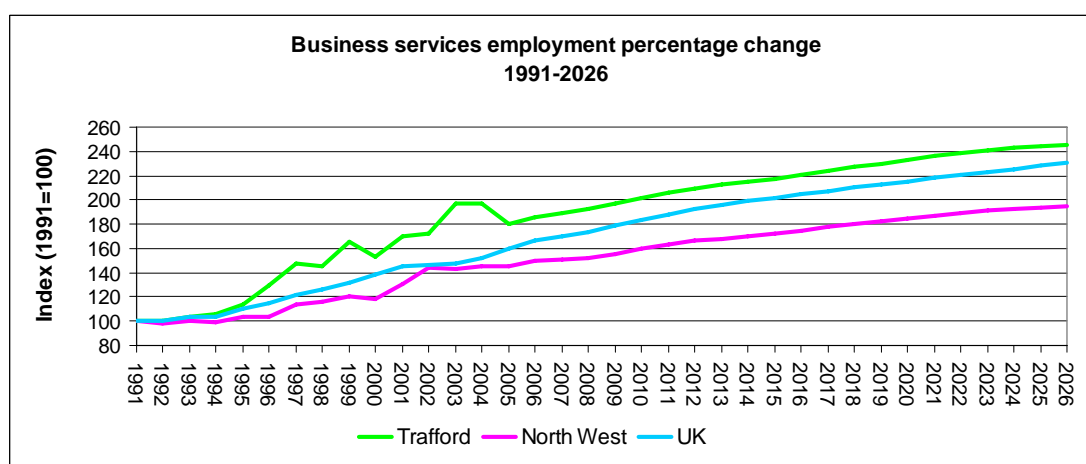


Source: Greater Manchester Forecasting Model 2007

3.147 Retail and wholesale employment is set to increase very gradually as both figure 3.39 and 3.27 illustrates. This trend is not dissimilar to what is predicted on a regional and national scale although like manufacturing, the Trafford trend is at a larger percentage of the total employment than in the North West and UK.

3.148 Figure 3.40 illustrates that the growth predicted in the business services sector is likely to mirror regional and national trends by inclining steadily.

Figure 3.40



Source: Greater Manchester Forecasting Model 2007

3.149 Like the recent trends seen in the 'Sector Analysis' section of the chapter it is difficult to determine from this data, what the main driver for this growth is going to be, particularly since the GMFM data does not specify which sub-sectors make up the Business Services sector in the data.

Trafford Park Summary

3.150 This section of the report has provided analysis of current and past trends with regards to economic activity on Trafford Park. The key conclusions from the research can be summarised as follows:

Greater Manchester

3.151 The Greater Manchester Urban Core is a major employment centre within the North of England and within this Trafford follows Manchester City Centre as the most dynamic employment area. The Greater Manchester economy has grown rapidly and the economic forecasts suggest this will continue. The key features are:

- The Greater Manchester Urban Core is a major employment centre within the North of England and will increase its influence over the next twenty years. The new and distinctive feature of Greater Manchester and other northern economies is the strong representation in the Financial and Business Services sectors (which has been the key driver of economic growth nationally for many years) and the scale of the conurbation (with population forecast to grow further).
- The most significant feature of the economic forecast is the exceptionally high proportion of employment growth which will take place in the City of Manchester. This is a new phenomenon, apparent since the mid 1990s, reversing decades of population and employment decline when many sectors move from inner city locations to new employment sites in Boroughs such as Wigan and Bolton and new towns such as Warrington.
- Greater Manchester will also experience a substantial decline in manufacturing employment (59,000 jobs over twenty years).
- Employment opportunities growth will be significant in the Financial and Business Services, Hotels and Distribution, and Other Personal Services sectors and the majority of these opportunities will be located within Manchester's Urban Core, with a focus on the City itself.

3.152 These changes will provide a great number of opportunities for Trafford Park and some major challenges, particularly the further re-structuring of the manufacturing base.

Trafford Park Current Economic Base

3.153 The total number of people employed in Trafford Park in 2006 was 31,974. The total number of business was 1,271. While employment numbers have been stable for the past few years. In 2006 Trafford Park accounted for nearly 3% of the total businesses and nearly 1.5% of the total employment for Greater Manchester.

3.154 Two broad sectors dominate employment in Trafford Park:

- **Wholesale and retail trade** accounted for 37% of total employment in 2006, nearly 12,000 employees in total. This is more than double the equivalent regional and national percentages (both of which are 17%). Retail employs more people than wholesale with almost 60% of the total number of employees in this sector employed in retail alone.
- **Manufacturing**, the second largest broad sector, accounting for nearly a quarter of all employment on the Park, totalling over 7,000 employees (22.95% of total). This is again much larger than the equivalent percentage figure for England and Wales which stands at 11% and the regional figure of 12.6%. Trafford Park continues to be a key employment location for manufacturing businesses.

3.155 Despite recent office development at the periphery of the Park, financial intermediation and real estate & business activities are under-represented compared to the North West and nationally. Currently just over 4,000 people are employed in the sector, accounting for just 13% of all employment compared with 20% nationally.

3.156 Another significant employer is distribution which is the fifth largest employer in the Park with 2,654 people employed in the sector, accounting for nearly 8.5% of total employment in the study area. This is nearly three times the percentage of people employed in this sector both regionally and nationally.

3.157 In 2006 retail and wholesale had the most number of businesses in Trafford Park with 493 businesses in total representing 38.8% of the total number of businesses. There is a relatively large number of companies on Trafford Park with a strong base of employment but a low representation of very small businesses. The over representation of medium to large businesses in Trafford Park may leave it vulnerable to a few large scale closures having high impact on employment in the Park.

Trafford Park employment and business recent trends

3.158 Trafford Park is the key driver for economic activity in Trafford borough and accounts for nearly 3% of employment in Greater Manchester. Employment levels have steadily increased in Trafford Park wards between 1991 and 2006. This compares favourable to employment level change in the North West and UK which have seen lower percentage growth than Trafford.

Trafford Park recent sector trends

3.159 The key features of employment change are:

- **Manufacturing** saw the highest percentage employment decline between 2003 and 2006 with almost a 15% drop in employment, a loss of 1,262 jobs. Although this is line with the long term and the national trend, this continuing erosion of the

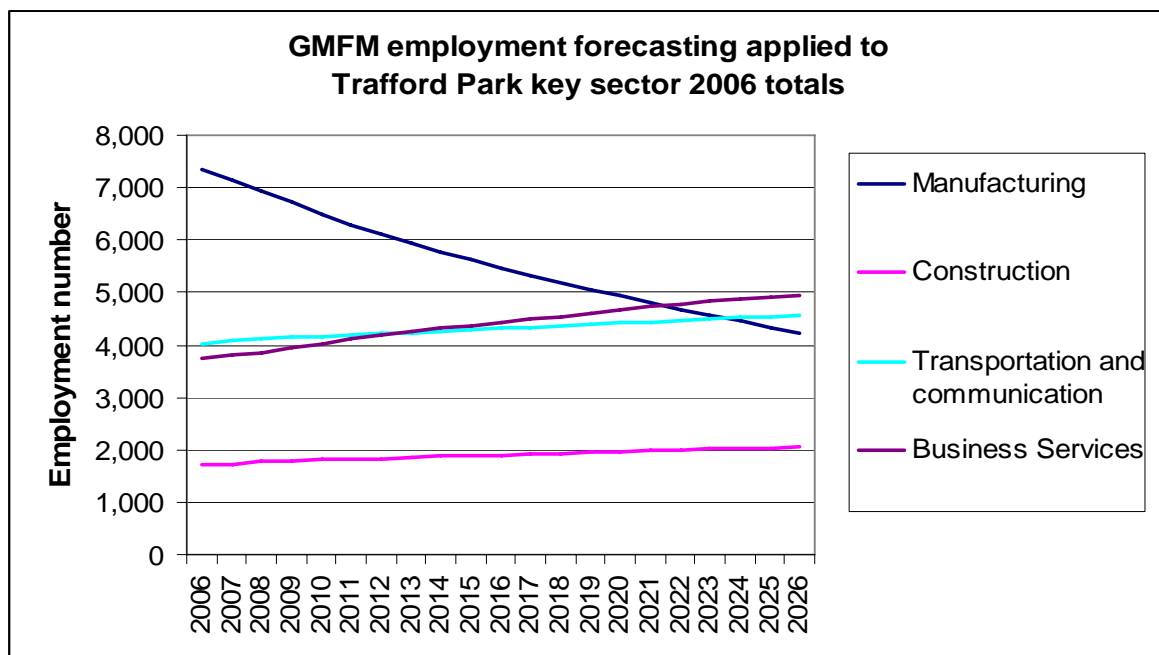
manufacturing employment base has major implications for future plans for the Park;

- **Retail** experienced a marked increase in employment over the three year period between 2003 and 2006 by nearly 14% which equates to 859 employees.
- **Wholesale** also saw significant increases in employment in this period with 558 more people employed in 2006 than in 2003, representing almost a 13% increase.
- **Real Estate and Business Activity** declined by almost 14% with a loss of 598 jobs. Despite the relatively short time frame, this is still a significant decline and counter to the national trend where employment increased over the period.

Economic transformation in Trafford Park

3.160 According to the Greater Manchester Forecasting Model percentage increase forecasts, employment is expected to grow in Trafford Park between 2006 and 2026. although there will be losses and gains amongst the major sectors. .

Figure 3.41



3.161 The highest growth in employment is expected in retail, wholesale and distribution with 669 more jobs expected in this sector in 2026 than in 2006. This represents an increase of 39%. The steepest decline is expected in manufacture with 3,105 less jobs in this sector in 2026 than in 2006. This represents a decrease of 42%. Steady increase in employment is also expected in construction and transportation and communication and business services.

3.162 Using the findings above an analysis of the strengths, weaknesses, opportunities and challenges for the Trafford Park economy are set out in table 3.41.

Economic SWOC Analysis

| Table 3.9 Economic SWOC Analysis | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Strengths</p> <p>High profile area with strong industrial heritage</p> <p>Trafford part of the regional centre and urban core of the fastest growing sub-region in the UK.</p> <p>Well established employers (e.g. Kelloggs, Adidas) within the study area</p> <p>Large employment sites available</p> <p>Proximity to Manchester City Centre, Salford Quays and Major Universities</p> <p>Proximity to Manchester Airport</p> <p>Large sub regional labour market</p> | <p>Weaknesses</p> <p>An absence of shops and services for employees</p> <p>Lack of commercial office space suitable for accommodating Finance &P and Digital, New Media industries.</p> <p>High levels of worklessness and economic non-participation in local residential areas.</p> <p>Over reliance on a small number of key sectors.</p> <p>Low representation of small sized businesses and high reliance on medium to large businesses which leaves the Park vulnerable to business closures.</p> |
| <p>Opportunities</p> <p>Predicted growth in the financial and professional sectors.</p> <p>Growth in MediaCity</p> <p>Opportunity to increase the quality of employment sites and the physical environment through the study area;</p> <p>Increasing links to Manchester universities particularly in relation to key sectors requiring a highly skilled workforce</p> <p>Repositioning the Park to offset the decline in manufacturing by support growth sectors identified in the RES and also forecasting models.</p> <p>Distribution where it continues to be competitive can benefit from wider growth in Greater Manchester and the region.</p> | <p>Challenges</p> <p>Long term decline in manufacturing employment in the UK.</p> <p>Increasing demand for higher qualified workforce.</p> <p>Increasing competition from high specification business locations elsewhere.</p> <p>Continued reliance on labour force with non-transferable highly skilled, blue-collar jobs such as engineering.</p> <p>Preference of growth centres for urban/city centre locations</p> |

Technical Note: Data Sources

3.163 Data for this section has been gathered from a variety of Sources such as the Annual Business Inquiry (ABI), Annual Employment Survey (the predecessor to ABI) Greater Manchester Forecasting Model (GMFM), VAT registration data and Hoovers Business Directory. It has also been supplemented by the findings from consultations with a range of key stakeholders.

3.164 The Annual Employment Survey (AES) was replaced by the Annual Business Inquiry in 1998. The ABI has been used to inform the core of the baseline analysis, which includes the current profile of the local economy; recent trends in employment and business levels; identification and analysis of current and future key sectors in Trafford Park; the sizes of businesses in the study area as well as a brief analysis of business start up levels which can be an indicator of enterprise levels in the area. ABI data is available for the actual study area by SOA (see below for information on geographies) between 2003 and 2006. AES and ABI used in combination provides longer term data between 1991-2006 but for Trafford Park wards which is a slightly less focussed geography than the actual study area (see below). GM Forecasting has also been used to inform the above analysis in terms of both past trends and future forecasts, although it must be noted that the most defined area this data refers to is Trafford, not Trafford Park as is the case with ABI. VAT Registration data has also been used in order to examine the change in business stock in the area.

3.165 The GM Forecasting Model was developed by Oxford Economic Forecasting to model the local economies, populations and households of Greater Manchester and surrounding areas. For the purpose of the Trafford Park Economic Analysis, the labour market (employment) and GVA forecasts data from GMFM was used. This series data refers to the economy as a whole and by sector and covers the time period 1991-2026. The base data for GM Forecasting is 2007. GMFM was used to formulate analysis on future trends in Trafford which includes business and employment numbers; key sector development; the key components for employment change and also GVA output.

3.166 The Hoovers Business Directory has been used to identify business contacts for the survey element of the study. It is referred to in this section to try and provide more recent sector information than the data gained from ABI, the most recent of which is 2006. Trafford Council subscribe to Hoovers which is widely recognised as one of the most reliable Sources of business information available.

Industry Sectors

3.167 Data from ABI and AES is available for sectors up to 4 digit sic codes. VAT Reg and GMFM data is only available for broader industry sections which groups some sectors together including Retail, Wholesale and Distribution.

3.168 Where possible, sectors have been broken down into 2 and 3 digit sic codes to allow for more accurate analysis of the trends taking place in the individual sector. Retail refers to sic code 52 which includes all retail trade except for the trade of motor vehicles. Wholesale refers to sic codes 50 and 51 and includes the sale, maintenance and repair of motor vehicles and wholesale and commission base trade.

3.169 Distribution refers to three digit sic codes 60.1, 60.2 and 63.1 and includes transport via railways; other land transport and cargo handling and storage.

3.170 Because of the large number of sub-sectors that make up manufacturing, to allow for more accurate sector analysis this sector has also been broken down into 2 digit sic codes where needed.

Geographies

3.171 In terms of geography, the study area as detailed in the introduction has been defined as the following SOAs - E01006121, E01006158 and E01006157. ABI data for the Super Output Areas provides the most localised data with the ability to look at Trafford Park, Trafford, the North West and England & Wales between 2003 and 2006.

3.172 The wards which most closely match the study area have been identified as Davyhulme East and Park. These have been used in order to identify more long term recent trends from ABI and AES data.

3.173 For VAT registrations/de-registrations data the most localised data is for Trafford borough only as is the case with Greater Manchester Forecasting Model data.

4 Land Ownerships on Trafford Park

Introduction

4.1 Trafford Park today comprises an extremely fragmented estate in terms of its ownership. We can categorise those ownerships as follows:-

- institutional investors
- national property companies
- local property companies
- high net-worth individuals
- owner-occupiers
- football-related interests

4.2 The Study Team have attempted to chart this diversity through the production of a detailed plan of the Park highlighting the different ownerships. This is by no means exhaustive and there are a number of areas that we have not delineated.

Land Ownerships Plan

See Figure 4.1 - 'Trafford Park Land Ownerships' over page

Summary of Ownerships

4.3 The plan demonstrates the level of fragmented ownership within the Park; this situation is particularly apparent within 'The Village' where there are a multitude of owner occupiers and investors often with small holdings or individual units. The large holdings, as can be seen in the above plan, are held by institutional investors and property companies. This highlights the need for a comprehensive, broad-ranging consultation on the potential future direction of the Park to ensure that opinions from the whole Trafford Park community are captured.

4.4 We provide overleaf a table highlighting some of the principal ownerships that we would estimate control in the region of 60% of the land and property holdings within Trafford Park.

| Landowner | Principal Ownerships |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Brixton Plc | Westbrook Park Longwood Park Sevenside Trading Estate Circle South Industrial Estate Twining Road Premier Park (new development) Electric Park (6 acre site) |
| Peel | Peel Rectangle (bounded by Parkway, Bridgewater Canal, Manchester Ship Canal and M60) Trafford Park Road (Quay West) |
| Legal & General | Central Park |
| Threadneedle | Stretford Motorway Estate |
| Royal London | Parkway Trading Estate former Exel unit, Ashburton Road West |
| Hermes | Guinness Road Trading Estate |
| CBRE Investors | Harp Trading Estate |
| Property Alliance Group | former Northern Foods, Ashburton Road West former Houghtons, Ashburton Road West Westpoint Enterprise Business Park |
| Cargill/Cerestar | Land and buildings at the northern point of Trafford Park adjacent to the Ship Canal, on both sides of Centenary Way |
| Manchester United | Land and buildings around Old Trafford Manchester International Freight Terminal (Part) |
| Kelloggs | Land and buildings, Barton Dock Road/Mosley Road |
| Prudential | Ashburton Park Centrepont, Westinghouse Road |
| Arlington/Aberdeen | Ashburton Point Barton Dock Road |

Key Opportunity Areas

4.5 Development opportunities with Trafford Park are limited due to the lack of available sites. We have collated the list below to demonstrate those that are available on the market or those set for development:-

- Electric Park, Westinghouse Road - 6 acres with consent for industrial use. The site is owned by Brixton Plc who are currently disposing of their interest in this site.
- Land on Westinghouse / Mosley Road - approximately 6 acres with consent for industrial use. The site is owned by St Modwen who intend to develop phase II of the scheme. They previously developed out the 400,000 sq ft unit let to Adidas.
- Warren Bruce Road - 1.5 acres with consent for office use. The site is owned by Peel Holdings who intend to develop it out themselves.
- Former Northern Foods Warehouse, Ashburton Road West - the site is owned by Property Alliance Group who have commenced on site creating a mixed office and industrial use development
- Former Houghtons Site, Ashburton Road West - the site is owned by Property Alliance Group who have commenced on site creating a mixed office and industrial use development

4.6 As evidenced by the above list, the majority of sites within the Park are already controlled by property companies, developers or institutional investors with plans to develop themselves.

4.7 Brixton Plc understands the movement with the Eastern Gateway of the Park towards a mixed use higher value offering, which they envisage to be residential and commercial driven. Being outside their area of specialism, the industrial sector, they are disposing of five strategic sites for alternative use development opportunities, totalling circa 17 acres - the largest site being 3 Wharfside at 6.7 acres. All five sites are located in the Wharfside area of Trafford Park an area that we have identified as having significant potential based on the two principal economic / strategic drivers:

- Manchester United Football Club - has significant land holdings within the area and with their local, national and global appeal can act as an anchor attraction and be a considerable catalyst for change.
- Media-City - Peel holdings are developing a high profile media hub, which is being marketed as a global destination for ICT and Media industries. This scheme is located on the opposite bank of the Manchester Ship Canal from Trafford Park and is anchored by the BBC, who are relocating five departments from London and Manchester to Salford.

4.8 There is a desire for mixed-use development based on the two above drivers and also taking into account the Imperial War Museum ,Premier Inn and a number of high quality office schemes that have been developed clearly changing the face of this part of Trafford.

4.9 The most dramatic step forward is the proposed development put forward by Howard Holdings for Stratum, which will offer two towers of 35 storey and 23 storey towers providing

190 bed hotel, 780 apartments and 70,000 sq ft of offices, which would be located next to Manchester United's ground. It is anticipated that Howard holdings will apply for planning consent in the next 2-3 months for this proposal.

4.10 Trafford Borough Council have an extremely important role to play in how this part of Trafford Park develops over the next ten to twenty years. Within the industrial core of the Park, new developments are moving the standard of product offered to the market forward, these include:

- Premier Park, Trafford Park Road developed by Brixton Plc. This recently completed scheme offers 192,000 sq ft of high quality units located on a site secured by barrier access and an 24 hour manned security hut.
- Central Park, Village Way is owned by Legal & General. Easter developments have commenced construction of an additional 95,000 sq ft of high quality industrial accommodation on the estate on behalf of the owners.

4.11 All of these developments will have a significant impact on the quality of stock found within the core and such development activity demonstrates the potential that developers and landowners feel Trafford Park has to offer.

4.12 Other future developments will include the redevelopment of out-dated accommodation such as parts of Central Park Estate and Royce Trading Estate on expiry of current leases. Sites set for redevelopment include Brixton Plc's 17 acre Twining Road site and a 5.75 acre site recently sold by Kelloggs to a national coach company.

Summary

4.13 Trafford Park currently has a small number of large strategic landowners, notably Peel and Brixton, who have significant interests in the area; the remainder of the area is much more fragmented in terms of land ownerships, with a mixture of owner-occupiers and institutional investors owning a plethora of smaller sites. Developing a comprehensive, phased and cohesive redevelopment strategy for Trafford Park with this mix of ownerships will undoubtedly provide a number of challenges - in particular balancing the drivers and aspirations of some of the major strategic land owners with those of other landowners, and potential those of key stakeholders. However there is clear evidence that the many of the present landowners within the Park are moving development forward by redeveloping out-of-date stock or developing out the limited number of sites available. This provides evidence of a clear appetite and belief from landowners that there is an ability to improve the Park and that there is longevity in such schemes. This will obviously depend on market factors, however even at this point in time the owners see a good long-term future for the Park.

4.14 They commission partners, and Trafford Metropolitan Borough Council in particular, could have a fundamental role to play with the development of the Park and for the transition

of tenure within it. There are clear opportunities to enhance the Park's appeal and to add to its diversity based on existing and future developments which will support development for the whole gateway area, with obvious associated benefits to the core industrial area.

5 Spatial and Urban Design Analysis

Introduction

5.1 This section of the report sets out the urban design apparatus to inform the development of a full Masterplan for Trafford Park. Trafford Park is a unique urban environment that, in some instances, could not be analysed in an ordinary fashion. Some urban design tools, such as, land-use appraisal were adapted to give a finer grain of analysis - for example expanding the usual B1 and B2 categorisation.

5.2 The following series of plans illustrate the key findings, providing a resource and the beginnings of a physical basis for a masterplan. The chapter is structured as follows:-

- Public realm analysis
- Land-use analysis, including character areas
- Townscape areas, features, views and vistas
- Street quality
- Landscape and natural features; and
- Aerial analysis

5.3 In addition a photographic library containing over 500 photos with the direction and location of each photo has also been compiled as useful source of information to support the baseline. *The Study Team are assessing a number of options for providing access to this library, including investigating a way of providing embedded links with plans which would lead directly through to individual images of that specific location.*

Public Realm Analysis

See Figure 5.1 - 'Trafford Park - Public Realm Diagram' over page

5.4 The public realm drawing provides an insight into the quantity of public space and how the open spaces work (or do not work), and hence aid the understanding of what space can be accessed by the public and how it works as a network. The black areas of the drawing are clearly defined public realm - including most roads, paths, pavements and public parks. The white areas are those that are clearly defined private spaces. The grey spaces indicate areas that are neither wholly private nor wholly public.

5.5 The first and most significant observation that can be made is the severe lack of black areas within the study boundary. The only significant area of public space is that found to the west of the Trafford Centre and north of the JJB Soccerdome. However this area is derelict land that is open to the public but has no functional and very little amenity value. The edge of this space that fronts onto the Ship Canal is a tranquil area with some informal routes

provided by the now overgrown public realm works that the Development Corporation employed in the 1980s. At present this space feels neither safe nor accessible.

5.6 The remainder black areas are roads, publicly accessible paths and open space that is left-over- in-between buildings and roads- best described as 'passive amenity space'. The slivers of black are the roads and path network connecting people from one space to another. This network is expansive, with large landscaped roads making linkages across the Park. However, with the exception of the Village, most areas in-between are huge private plots and buildings with some cul-de-sac routes. This renders permeability as very weak, by failing to provide links across and in-between the wider network. The most successful public route runs along the Ship Canal, north of Trafford Wharf Road, linking the Imperial War Museum with the Lowry and Wharf End road via an impressive public footbridge.

5.7 Two shades of grey have been used in the plan: the lighter shade represents spaces that are entirely private with highly restricted access, for example, the World Freight Centre and its extensive storage capacity or exclusion zones around hazardous chemical storage. The darker shade is not private realm in the strictest sense, but semi-private in that they are accessible to the public, albeit not officially. These 'hybrid' spaces are significant in Trafford Park, as they indicate the large volume of land that belongs to businesses which are often fenced-off, defensible space that is, to varying degrees, marshalled with restrictions of access depending on the nature of the business - for example parking for employees, customers and visitors, outdoor storage and turning space for large vehicles. Whilst this is probably as would be expected in an industrial area, many of these semi-private spaces are found at the front and/or side of most buildings providing poor frontage on to many key vehicular and pedestrian routes and do not encourage increased non-vehicular use. Better boundary and frontage treatments would lift the overall appearance and environments within the Park, hence making it more attractive as an investment location, without hindering its functionality.

5.8 In some cases the semi-private space is in areas which either have started to develop alternative uses, or for which there is an aspiration to develop alternative land uses of a higher value - for example, the plot around Chillfactor. In these instances this is wasted space which could be used in ways which would be far more complementary to the emerging leisure-based character and again, would uplift the overall quality and feel of the area - and hence its investment and return potential - without impinging upon its functionality

5.9 The key summary points relating to public realm are set out in table 5.1 below:

Table 5.1 - Trafford Park Public Realm - Key Points

- There are very large blocks of wholly private space within the Park, with a relatively small amount of clearly-defined public space
- In some areas of the Park there is a lack of a clear definition as to what is private space and what is public space
- There is a considerable proportion of semi-private space within the Park, with potential to use some of this much more effectively than at present - notably on frontages of key routes and in areas where a change to higher-value land uses is being sought. This will not only lift the overall appearance and environment within the Park, but encourage greater non-vehicular movement and could improve the Park's investment potential
- The Park's most significant public space - Trafford Ecological Park - is not readily recognisable and has restricted access.

Land Use Analysis

See Figure 5.2 - 'Trafford Park - Land Use and Character Areas' over page

5.10 The main purpose of the land use diagram is to demonstrate the types of activity and businesses taking place through Trafford Park. In order to develop a finer grain of analysis the Study Team have further refined the traditional B1 and B2 (General Industrial and Business) land use classifications as follows:-

Clean sheds

5.11 Buildings which have, in relative terms, a clean use such as storage. The primary function of these sheds is storage and are above 500m² in footprint area. They do not have a chimney or a significant number of doors.

Transport and Distribution

5.12 Buildings with at least one façade of doors devoted to loading and easy goods access- were classified under this category. Their primary function is distribution despite significant capacity for storage.

Non-clean Sheds

5.13 These are those buildings dedicated to larger manufacturing processes, refinery, isolated and potentially noisy users such as garages, mechanics and stonemasons.

Hazardous

5.14 These are buildings and or structures that contain or involve processing dangerous/explosive chemicals. They may require a minimum distance of exclusion zone.

Small sheds

5.15 These sheds are 500m² or less and represent a finer-grain of business or light industry. They may have a small office at the front and/or, from the outside, may appear to be a large shed, but are actually sub-divided into smaller units.

5.16 The land-use plan at first does not present any obvious or dominant patterns, however, there are some more general or 'loose' patterns that can be perceived, which have been defined into as seven character areas:-

Character Area 1

5.17 The area emerges from a historic pattern of uses going back at least 100 years, including for example Cargill Corn processing, the Dry Docks and hazardous chemical storage/ processing. These generally unclean uses have clustered in an arc, following the edge of the Ship Canal, and are complemented by several other businesses primarily based in transport and distribution. Whilst this is a well-established and large-scale belt of activity, it does not provide 'good neighbours' for those higher-value uses to the south.

Character Area 2

5.18 This area is a congregation of leisure activities in and around the most westerly corner of the study area. The area also has a smattering of complementary offices, restaurants and hotels, which it is anticipated could develop further in the next 3-5 years.

Character Area 3

5.19 Retail is the prevalent land use in this area. The Trafford Centre and various other large-scale stores such as Asda and B&Q typify the offer. This area has an over-predominance of surface car-parking, which is not the most efficient land use.

Character Area 4

5.20 This character area is purest at the eastern end of its coverage with the Village consisting of a fine-grained concentration of small-scale land users- such as shops, offices, small sheds, a church, hotel etc. This quite distinctive and clear grid can be seen as continuing to the west of the area with a mixture of clean sheds, small sheds and at the most westerly corner particularly fine-grained and human scaled.

Character Area 5

5.21 This pattern of uses is one that can be identified in three separate area of Trafford Park. In each case the key commonality is concentration of activity and people. The character is dictated by small sheds, housing a fine-grain of smaller businesses, as well as small office buildings and some small-to-medium sized clean sheds.

Character Area 6

5.22 Trafford Wharf Road is a relatively homogenous concentration of good quality offices and clean sheds. This higher-specification characterisation is reinforced by the presence of the Imperial War Museum North, the near-by Lowry and imminent Media City.

Character Area 7

5.23 Along the south easterly boundary of the study area a pattern of non-clean and transport and distribution uses can be observed, clustered loosely next to the rail and road linkages. These uses include the World Freight Centre, Kelloggs and various other lorry based distribution businesses.

5.24 The remainder of Trafford Park are clean sheds, which are the most prolific of the uses and can be seen to be scattered across the Park with their highest density being the central and southern parts of the study area. There are relatively few redundant or vacant buildings and very few residential properties.

5.25 The key findings from the land use analysis is summarised in Table 5.2.

Table 5.2 - Trafford Park Land Use - Key Points

- The Park has no single predominant land-use using the finer-grain land use classifications, **with** 'clean shed' uses are the most prevalent of all land uses;
- Seven loose character areas can be identified;
- Northern belt of non-clean, hazardous and distribution uses;
- Large-scale hub of retail and leisure uses to the south-west of the Park; and
- The Village and several other examples of small sheds/ offices clusters represent fine-grained concentrations of workers and people.

Townscape Areas, Features, Views and Vistas

See Figure 5.3 - 'Trafford Park - Townscape Areas, Features, Views and Vistas' over page

5.26 This drawing identifies areas that can be deemed as having townscape merit. The Park as a whole is not considered to have positive townscape merit, however there are nine discreet areas that can be considered as having townscape value in the context of the wider Park. Townscape assessments were based on four key performance criteria: activity,

legibility, enclosure and grain. The scores for each of these areas are broken down on the drawing, in addition to an average score which summarises each areas contribution. The most notable area of townscape is the Village which scored relatively highly in all categories.

5.27 Although there are relatively few blues stars denoting buildings/ structures worthy of landmark status, they are nonetheless particularly varied and unique - for example, Barton's Canal Bridge, Centenary Bridge, Imperial War Museum, Trafford Park Hotel, ChillFactor etc, all of which present innovative, highly varied and distinctive forms.

5.28 Views throughout Trafford Park are almost entirely coincidental and cannot be classified as vistas. They are very often happen to line-up on buildings such as residential tower blocks across the Ship Canal, or the bottom corner of the Lowry building, or the Trafford Centre domes. There are several opportunities, indicated by red arrows, to provide a sequence of views through the Park that could be terminated with distinctive buildings that aid legibility, helping people navigate and understand the area. At present, the only clear and positive vista termination is the Kelloggs Link Bridge when approaching from the south along Park Road.

5.29 There are very few vantage points in and around the area, those that are available are from bridges. There are some views that should be protected or at least borne in mind along the Ship Canal, across Dry Docks and from the Trafford Park Rail station.

Table 5.3 - Trafford Park Townscape Areas, Features, Views and Vistas - Key Points

- views tend to be are coincidental and not 'true' vistas;
- The Park has very few vantage points - only bridges;
- There are several interesting features/engineering structures in and around the area, notably relating to the Ship Canal and railway lines; and
- The Park has very few landmark buildings to orientate or understand areas.

Street Quality

See Figure 5.4 - 'Trafford Park - Street Quality' over page

5.30 This drawing is an urban design interpretation of Trafford Park's key roads. This information is complementary to the Road Hierarchy provided in the following chapter. The emphasis here is pedestrian experience, most significantly; ease-of-use, clarity of route; quality of environment and building line. The key characterises the road as:-

Busy/hostile.

5.31 These routes are heavily-trafficked, and are potentially noisy and polluted and difficult to get through. They also lack enclosure, and despite numerous signage and the nature and scale of the buildings that typify these streets, are not easy to understand.

Confusing

5.32 These routes are important routes that are difficult to understand and navigate. A combination of roundabouts and sharp bends make it orientation and way-finding difficult - for example Ashburton Road, an historic route which when built was forced to bend around a very large steel works: the steel works no longer exists, but the sharp bend in the road has remained.

Potential

5.33 These roads could be of higher quality and be a more useable part of the network. They may have positive qualities such as wide pavements and a fairly consistent building line, however, they have significant quantities of redundant rail infrastructure along one side or are generally not prominent enough- given their potential status within the wider network.

Good

5.34 These are those roads that perform the highest in the face of most criteria. They still have scope for improvement but, they generally have a good or consistent building line, buildings in proportion to the width of the street, reasonable pavement widths, some landscaping and tree planting, easier to understand in terms of role and location.

Table 5.4 - Trafford Park Street Quality - Key Points

- Centenary Way and Tenax Road are un-necessarily confused by roundabouts;
- Ashburton Road West is disorientating because of its sharp bends;
- M60, Trafford Boulevard and Barton Dock Road are very busy, noisy and polluted roads;
- There are several roads such as Westinghouse Road that need to be more useable in relation to the wider network- they have potential but are 'punching below their weight'; and
- There are roads such as Trafford Wharf Road and Village Way that perform well in most areas, but still have scope for improvement.

Landscape and Natural Features

See Figure 5.5 - 'Trafford Park - Landscape and Natural Features' over page

5.35 The purpose of this drawing is to build on and reinforce some of the points made with the public realm diagram. The drawing highlights the 'unexpected joys' that reside within Trafford Park, such as Trafford Ecological Park, Dalton Park and the substantial and well-established green infrastructure that appear in places. Under-exploited landscape areas such as derelict open space to the north-west of the Trafford Centre and to the south of Chill Factor and the JJB Soccerdome are also highlighted.

5.36 Natural features within the plan are man-made, but are natural in the sense that they have ecological value and have become potentially important green or blue infrastructure. These features include the Ship Canal, the Bridgewater Canal and the Thirlmere Viaduct. The positive attributes of each of these features could be better exploited than they are at present and provide some local land-marks or orientation points. In addition there are opportunities to integrate each as amenity links/resources and ecological corridors.

5.37 The plan also conveys, with the exception of the Bridgewater Canal, the severe lack of landscape or natural features to the east of Trafford Park.

Table 5.5 - Trafford Park Landscape and Natural Features - Key Points

- 'Unexpected joys' such as Trafford Ecological Park and church garden;
- Pockets of well-established green infrastructure/ ecological buffer in places;
- Large quantities of underexploited landscape- particularly in most westerly corner;
- Underexploited/ ignored features such as Thirlmere Viaduct, Bridgewater Canal and Ship Canal; and
- Lack of landscape and natural features in the east of Trafford Park.

Aerial Analysis

See Figures 5.6 / 5.7 / 5.8 - 'Trafford Park - Aerial analysis from the South / West / East' over page

6 TRANSPORT AND INFRASTRUCTURE ASSESSMENT

Introduction

6.1 This section sets out a baseline assessment of the existing transport, movement and accessibility situation in the Trafford Park masterplan area, scoping potential areas of improvement within the estate as part of the phase 1 commission. It considers the strengths and weaknesses in relation to all modes of travel in Trafford Park and will feed into the development of a full transport and accessibility assessment in the full Masterplan.

6.2 It also considers other strategic infrastructure issues of relevance to the future development of the Park, including the provision of utilities infrastructure (gas, water, electricity and telecoms) and green infrastructure.

Strategic Transport Links

See Figure 6.1 - 'Trafford Park Strategic Transport Network' over page

6.3 Figure 6.1 shows the strategic transport network of the region and the surrounding area for Trafford Park. The Park area benefits from good access to the strategic Motorway network. The M60 motorway forms the western boundary to the Trafford Park masterplan area. Junctions 9 and 10 of the M60 provide access to The Park. The M60 provides connectivity to the M62 and M56 motorways and through these routes to the M6.

6.4 European and global connections are provided for via Manchester Airport and the port links at Liverpool. Manchester Airport is approximately 10 miles from Trafford Park and has good connectivity via the M60 and M56 motorways.

6.5 Rail freight connectivity is also a key feature of Trafford Park with the international freight terminal providing a major hub in the region.

6.6 In the Park's history the Manchester Ship Canal provided an important strategic connection. The Manchester Ship Canal was opened in 1894. It is a wide, 36-mile long navigation channel starting at Eastham Lock entrance, 8 miles up river from Liverpool and ending at Salford Quays. The canal is still utilised and its role could be expanded in the future, in particular for freight transport.

Highways

See Figure 6.2 - 'Trafford Park Highways' over page

6.7 Over the last 15 years, Trafford has benefited from a number of major transport infrastructure investments. Specifically within Trafford Park area this has mainly included new highway infrastructure, in particular in the vicinity of the Trafford Centre.

6.8 Figure 6.2 shows the principal road links serving Trafford Park, which are:

- A5018 Park Way in the centre of the Park linking with the M60 to all areas of Greater Manchester, and further connections to the M56, M61, M62, M66 and M67;
- The A576 Tenax / Centenary Way Road to the north linking the town with Salford;
- The A5081 Village Way which leads into Trafford Park Road to the east, linking with A56 Bridgewater Way connecting the site to Manchester City Centre; and
- The A5181 Park Road to the south provides a link to the A56 Chester Road towards Sale and Altrincham and a second connection to the M60.

6.9 It is notable that, Trafford Park is well connected by road to Manchester city centre and other parts of Greater Manchester and is also within easy access of other nearby towns and cities such as, Warrington and Liverpool which are considered to be within reasonable commuting distance.

6.10 Transport movements in the Trafford Park area are dominated by heavy goods vehicles and private cars. While there are some pinch points at peak times roads running through Trafford Park do not generally suffer from significant congestion problems. However, traffic with an origin or destination in Trafford Park is impacted by congestion on the surrounding road network especially in and around the Regional Centre. In the surrounding area the key roads such as the A56, A57, M60, M62 and M602 can be prone to traffic congestion at peak travel times.

6.11 The parts of the study area that can experience traffic congestion at peak travel times include the White City area and on Parkway. Match and event days at Old Trafford are when the area experiences the most significant congestion. The area surrounding the Trafford Centre can be prone to congestion at key peak retail travel periods including Saturdays and especially in Winter, before and after Christmas. The closure of Centenary Bridge and the Swing Bridge to allow vessels to sail along the ship canal can also generate traffic congestion for short periods. Road traffic accidents or incidents on the M60 in the vicinity of the study area strongly influence the extent of congestion in the area, in particular if the M60 Barton Bridge is closed.

6.12 In the Trafford Village centre itself, any through traffic is predominantly accommodated on Third Street. It is this road that provides access to the local facilities located in the centre. The Village area itself has been subject to many traffic calming measures, restricted rights of way and is lightly trafficked.

6.13 It is highlighted that traffic speeds can in some parts of the study area be high which can be an issue for the area in relation to road safety. This is in part due to the nature of the

highway network which is made up of straight, wide single and dual carriageway roads with no or little traffic calming infrastructure.

6.14 Signage to Trafford Park from the surrounding region is good. This is partly a consequence of the history of the area with Trafford Park being an important established employment area. However, signage within the area could be enhanced to more clearly direct vehicles to the different parts of the Park. This is an issue that should be addressed in the future planning of the area, which may include splitting the study area into zones or neighbourhoods.

See Figure 6.3 - 'Trafford Park Average Weekday Traffic Flows' over page

6.15 Figure 6.3 shows the annual average weekday traffic flows (AAWT) along the key links in the study area, including the M60 motorway. The high volume of traffic on the M60 is highlighted along with the roads in the vicinity of the Trafford Centre (Park Way, Barton Dock Road and Trafford Boulevard) and the A576 (Tenax Rd/Centenary Way). The A5081 (Parkway / Village Way) has been observed to have the highest volume of traffic in the study area of which a high proportion of vehicles are HGVs.

6.16 *TMBC trying to arrange access to full GMPTU Traffic data to enable WSP to validate and augment and the above analysis.*

See Figure 6.4 - 'Trafford Park Accident Cluster Points' over page

6.17 Accident cluster points for the period 2003 to 2005 are shown on Figure 6.4. The source of this data is the GMTU Road Casualty Statistics Greater Manchester (2005) report prepared for LTP2. The accident clusters are shown at the junctions of M60 Junction 9 and Junction10 and the Park Way / Barton Dock Road Junction. In addition the GMTU report analysis highlights that at the Park Way / Barton Dock Road Junction and the Trafford Boulevard / Barton Dock Road / Redclyffe Rd / Ashburton Road West roundabout clusters of cyclist accidents are recorded.

6.18 *TMBC trying to arrange access to full GMPTU Traffic data to enable WSP to validate and augment and the above analysis.*

Public Transport

See Figure 6.5 - 'Trafford Park Public Transport' over page

Bus Services

6.19 The current public transport accessibility of Trafford Park is relatively poor. This is reflected by the fact that some 80% of those working in the Park travel by car to get to work. Despite this overall picture there are some parts of the masterplan area which are well served

by bus services. There are approximately 20 bus services per hour operating a core daytime service in the vicinity of the Trafford Centre. At the eastern end of the study area, in the White City / Chester Road area 18 bus services per hour operate during the core daytime period. This contrasts with the centre of Trafford Park which has only one high frequency bus route operating through this area between Manchester City Centre and the Trafford Centre. The bus routes are shown on Figure 6.2.

6.20 There are numerous other routes that penetrate other parts of the study area, however these services attempt to correspond with employment shift patterns, running up to five services during the AM and PM peak hours only. Some of these services operate from areas (eg. Wythenshawe and Langley) which attracted significant numbers of employees to Trafford Park in the past. Evidence today suggests that the majority of the labour force is drawn from neighbouring parts of Trafford, Salford and Manchester but the bus network serving these areas is not particularly comprehensive. The high frequency bus route 250 from Manchester City centre to the Trafford Centre is relatively lightly used by employees of Trafford Park with very few passengers observed waiting for services at various times throughout the day. The timetabled travel time from Trafford Park to Manchester City Centre is 26 minutes.

6.21 Table 6.1 shows all bus routes serving the site area, **with a daytime frequency of one or more bus per hour.**

| Table 6.1: Bus Routes Serving the Study Area (with a daytime frequency of one or more bus per hour) | | | |
|-----------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|--------------------------------------|-------------------------------------------------------|
| Service | Route | Operating Times | Frequency |
| 18 | Altrincham, Manchester Airport, Wythenshawe, Sale, Stretford, The Trafford Centre | Mon-Sat 6am - 12am Sun 8am - 12am | Daytime Mon-Sat = 2 per hour Sun = 1 per hour |
| 22 | Stockport, Burnage, Chorlton, The Trafford Centre, Eccles, Swinton, Bolton | Mon-Sat 6am - 12am Sun 8am - 8pm | Daytime Mon-Sat = 2 per hour Sun = 1 or 2 per hour |
| 23/23a | Stockport, Chorlton, Stretford, Urmston, Davyhulme, The Trafford Centre | Mon-Sat 6am - 12am Sun 8am - 12am | Daytime Mon-Sat = 4 per hour Sun = 2 per hour |
| 58 | Rochdale, Milnrow, Shaw, Oldham, Middleton, The Trafford Centre | Mon-Sat 9:30am - 6:30pm | Daytime Mon-Sat = 1 per hour |

Table 6.1: Bus Routes Serving the Study Area (with a daytime frequency of one or more bus per hour)

| | | | |
|-----|--------------------------------------------------------------------------|-----------------------------------------------|------------------------------------------------------|
| 100 | Warrington, Hollins Green, The Trafford Centre, Eccles, Manchester | Mon-Sat 7am - 12am Sun 10am - 12am | Daytime Mon–Sun = 3 per hour |
| 126 | Leigh, Astley, Boothstown, The Trafford Centre | Mon-Sat 9:30am - 6:30pm | Daytime Mon–Sat = 1 per hour |
| 247 | Eccles, The Trafford Centre, Flixton, Partington, Sinderland, Altrincham | Mon-Sat 6am - 12am Sun 9am - 12am | Daytime Mon–Sat = 2 per hour Sun = 1 per hour |
| 250 | Manchester, Old Trafford, The Trafford Centre | Mon-Sat 6am - 12am Sun 9am - 12am | Daytime Mon–Sat = 6 per hour Eve / Sun 4 per hour |
| ML1 | Stretford Metrolink Station to Trafford Centre | Mon-Sat 8:30am - 12:30am Sun 8:30am - 10pm | Daytime Mon–Sun = 3 per hour |

6.22 The ML1 bus service provides a link between the Trafford Centre area, which includes Chillfactor and the JJB Soccerdome to the west of Trafford Boulevard, and the Stretford Metrolink stop. The service is targeted at integrating the Trafford Centre with the wider Metrolink network, in advance of a Metrolink service operating through Trafford Park to the Trafford Centre.

6.23 As outlined in Section 2, there are a number of medium term TIF proposals for improving public transport provision to the Trafford Park area in advance of the Metrolink extension. These are also shown overleaf in Figure 6.2

- Exchange Quay; and
- Harbour City.

6.27 In the future the MediaCity / Lowry stop will also be within a reasonable walk of parts of Trafford Park on the southern banks of the ship canal.

6.28 As highlighted in Section 2 there are proposals for a new Metrolink extension through the Park to the Trafford Centre leaving the existing Eccles line at Pomona. A route to the Trafford Centre was previously defined and had Transport and Works Acts powers. However, this alignment is currently under review and the masterplan study should inform the future route of Metrolink. It is Trafford Council's view that an immediate priority should be securing and safeguarding an agreed the route for Metrolink through Trafford Park to the Trafford Centre.

Rail Infrastructure

6.29 The southern boundary to the Trafford Park area is formed by the Manchester Oxford Road – Liverpool Lime Street line. Trafford Park Station is located on this line on the southern edge of Trafford Park. Services run approximately every two hours and there is no Sunday service. There are however four eastbound services timetabled to arrive/depart in the AM peak period between 7:15am and 8:45am. The station is un-staffed and the old street level ticket office is now used as an office by a taxi company. There is no clear street signage to the station and platforms are not accessible for people with impaired mobility.

6.30 The Trafford Park station does not adequately serve the Trafford Park area and consideration has been given to changing the name of the station to more clearly indicate the area which the station serves. Furthermore, the service level is poor and therefore does not encourage a high level of rail travel. The accessibility issues are discussed later in this section.

6.31 Manchester United FC Station is located adjacent to the football ground. This station is closed and does not run regular services. On match days a special service is run from the station for football fans. There is no clear signage and access to the station.

Table 6.2: Approximate rail journey times and frequencies from Trafford Park Station

| Destination | Average Journey Time | Mon-Sat Daytime Frequency |
|------------------------|----------------------|---------------------------|
| Manchester (Oxford Rd) | 10 - 14 minutes | 1 service every two hours |
| Liverpool | 1 hr | 1 service every two hours |

6.32 It should be noted that a high number of disused rail corridors pass through or close to the study area which previously distributed rail freight throughout the Park. Currently, some of these routes are being considered as possible future alignments for the planned Metrolink route from Manchester to Trafford Park and the Trafford Centre.

Pedestrian and Cycle Linkages

See Figure 6.7 - 'Trafford Park Pedestrian and Cycle Links' over page

6.33 There is an extensive cycling network throughout Trafford Park that includes dedicated off road pathways, on road cycle lanes and cycle priority at junctions. The National Cycle Network does not pass through any part of the site, however all routes are of a relatively high standard.

6.34 Although all cycle pathways are clearly marked, with few obstructions, traffic speed and the high proportion of heavy goods vehicles can create an intimidating atmosphere for cyclists and pedestrians. It is noted that although some streets are relatively lightly trafficked and a high standard of cycling provision is provided on and surrounding the area, at present, pathways are not utilised to their greatest potential. There is scope to encourage higher levels of cycling throughout Trafford Park.

6.35 Figure 6.7 shows the existing cycling facilities within the study area. The figure highlights that the Trafford Park area benefits from the presence of the following:

- Traffic-free routes with good surface that can be used in all weathers;
- On road routes with facilities to aid cyclists, such as cycle lanes;
- Bus lanes and advanced stop lines at traffic signals; and
- Quieter routes that can be used to avoid the busier main roads.

6.36 Cycling facilities are of a good standard in the vicinity of the Trafford Centre. Traffic free routes are wider, free from obstruction and clearly signed for access to the shopping centre.

6.37 There is no dedicated cycle provision within Trafford Park Village, however extensive traffic calming measures and traffic restrictions are in place making this a potentially attractive area for cycling activity and make the facilities of the area potentially accessible on bike from neighbouring industrial and commercial premises.

6.38 In terms of walking facilities within Trafford Park itself, many streets have wide unobstructed pathways. Pedestrian signage around the site is generally poor however except when pathways are shared with cycle provision, and there are no designated off highway walking routes. There are areas of significant severance for pedestrians, particularly at junction crossings. The majority of junctions do not have pedestrian crossing facilities available, and where they are provided they are often limited to one arm of a junction.

6.39 Although pathways provide plenty of space to safely walk unobstructed the high speed of passing vehicles and lorries can make walking throughout the Trafford Park area feel unsafe. Additionally, the scale of the estate and its industrial environment, can discourage potential walkers.

6.40 A few walking routes in the area are obstructed by overgrown vegetation, causing otherwise wide paths to be decreased in size and forcing pedestrians to walk closer to busy roads or share otherwise designated cycleways. This is most significantly a problem along Trafford Wharf Road from the Elevator Road to Warren Bruce Road junctions where vegetation is so overgrown that only one free cycle way remains and the walk path is completely obstructed.

6.41 The Manchester Ship Canal and Bridgewater Canal are generally inaccessible to the public as adjacent land is privately owned. However there are some unmarked and unclear walk/cycle paths directly beside the canals without any clear access points. These paths are not officially marked on Sustrans National and Regional Cycle Network plans.

Freight Transport - Road, Rail and Ship Canal

See Figure 6.8 - 'Trafford Park Key Freight Infrastructure Routes' over page

6.42 The main freight terminals in terms of volume in Trafford Park are the International Freight, Freightliner and Containerbase terminals. The Freightliner and International terminals in The Park are connected to the national rail network. The rail connection to the West Coast Mainline at Crewe or Stoke-on-Trent is via Manchester. There is a particular pinch point on the Manchester rail network. This is the section of the route in Central Manchester between Deansgate and Piccadilly stations, which as well as freight has an intensive passenger service.

6.43 A plan showing the key freight infrastructure and routes in the masterplan area is shown on Figure 6.7. This includes the main road freight routes in The Park. The A5081, Park Way, Village Way, Wharfside Way and Trafford Park Road, forms a primary route within the Greater Manchester Freight Network. Furthermore this route does not have any height restrictions limiting potential vehicle types. Manchester Truck Stop Lorry Park & Transport Café is located on Trafford Wharf Road. As well as the café and other associated facilities the Lorry Park permits overnight parking for HGVs and coaches.

6.44 The Manchester Freight Strategy identifies Trafford Park and the Trafford Centre as key generators of HGV trips. Trafford Council plan to review signing, loading facilities and lorry parking facilities with respect to key destinations in the Trafford Park area and the borough. The aim of this is to encourage use of the most appropriate routes for freight traffic. It is also understood that Trafford Council are considering introducing a pilot HGV only lane in Trafford Park.

6.45 The only waterway used by freight is the upper reaches of the Manchester Ship Canal continue to be used by freight operators and there is some recent evidence to suggest that levels of usage are growing. A small number of wharfside handling facilities exist in the Irwell Park/Trafford Park/Weaste areas. Currently approximately 1M tonnes of freight p.a. are moved by waterway from these wharfs including the Partington and Irlam sites.

6.46 A number of companies such as Shell, Tesco, Ineos, Cerestar, Rank Hovis, Proctor and Gamble, Castrol and Kingsland Wines are active in moving a range of cargoes along the ship canal. For example this includes containers, coal, chemicals, oils and grain, include household names. In 2007 a regular Shuttle barge service was launched to move containers between the international container terminal at Liverpool and the Irlam facility, not far from Trafford Park.

6.47 The proposed investment in Port Salford on the ship canal will stimulate further growth in waterborne freight.

Water Based Transport for Leisure and Passenger Transport Purposes

6.48 As noted above the Ship Canal still provides an important freight route in the region. The canal also performs a small leisure role. Mersey Ferries operate a six-hour cruise which departs from Seacombe and Woodside on the Wirral and Salford Quays on selected dates from April to October. Many of the cruises also include a stop-over in Liverpool or Salford Quays.

6.49 A notable leisure service operating in the Salford Quays, River Irwell and Bridgewater Canal is the City Centre Cruises LS Lowry boat. A variety of leisure trips are offered including a football service on match days to Old Trafford. The service sets off an hour before kick-off from Castlefield Arena, with the journey taking approximately 40 minutes.

6.50 The Irwell City Park Planning Guidance identifies the potential to introduce a system of river buses and taxis with the provision of landing stages at strategic points. There could be the potential to extend such a system along the Ship Canal to the Trafford Centre area. It is noted that Peel Holdings have a planning permission for a Water Taxi Basin in this area.

Key Approaches and Gateways

6.51 A number of key gateways to Trafford Park can be identified on the main highway network. Currently there are no clearly identifiable public transport gateways. The main highway gateway points to the masterplan area are:

- West - Junctions 9 and 10 of the M60
- East - The White City Circle
- North - Centenary Bridge; and

- South - Park Road

6.52 Park Road in the vicinity of the Kelloggs factory provides the main gateway feature on entering Trafford Park.

6.53 There is in the future the potential to improve the highways and Public Transport Gateways into the area. A clearer statement could be communicated through a gateway strategy which will aim to create a sense of place that identifies that people are entering a high quality urban area through signing and the presentation of the urban realm.

Parking

6.54 The majority of the parking in the area is associated with private businesses and is provided off street. The Trafford Centre itself contains the largest supply of car parking with 10,000 free car parking spaces available to shoppers and staff.

6.55 There is some on street provision in The Village. It is understood that TMBC plan to introduce a new parking strategy in this area which is mainly focused on addressing issues associated with match day parking.

6.56 The general supply and demand for parking appears to be balanced in the Masterplan area. There are a few locations where there is some overspill on to streets but this does not impact severely on traffic movement through these areas. The main parking problems are experienced on match and event days primarily at the football ground.

Internal Movement and Accessibility

See Figures 6.9 to 6.14 - 'Trafford Park Walking Isochrones and Public Transport Journeys' over page

6.57 In the wider context the ship canal, rail lines and Motorway also act as a barriers which cause severance between the Masterplan area and surrounding neighbourhoods. This impact is most noticeable for walking, cycling and public transport.

6.58 Severance is also an issue for pedestrians and cyclists within the Park. Furthermore, the uninviting industrial environment of parts of the area is a barrier to travel by these softer modes of transport.

6.59 Figures 6.10 to 6.12 provide walk distance isochrones from key areas of the masterplan area, including the Trafford Centre (Figure 6.8), Old Trafford / White City (Figure 6.9) and Trafford Park Rail Station (Figure 6.10). These plans highlight the severance effect

of transport infrastructure such as the rail lines, canals and motorways along with the large industrial units. In particular Figure 6.8, which has the Trafford Centre as the destination, highlights that the M60 and ship canal form a barrier to trips from the surrounding residential areas of Lostock, Davyhulme, Urmston and Barton upon Irwell. The Bridgewater Canal limits access by foot from the areas of Trafford Park to the North East of the Trafford Centre.

6.60 Access to the Old Trafford / White City area, is generally quite good despite the presence of the Liverpool to Manchester rail line, the Bridgewater Canal, the Altrincham Metrolink line. This is shown on Figure 6.11. The main barrier to walking in this area is the ship canal. However, proposals to construct new bridge crossings at Clippers Quay and at Media City will significantly improve access to Salford Quays.

6.61 Figure 6.12, demonstrates the issue highlighted earlier in this section in relation to the accessibility to Trafford Park Station. The footpath from the end of Moss Road to Frazer Place provides an important link to ensure some parts of Trafford Park have reasonable access to the rail station. However, due to the Bridgewater Canal and the Kelloggs factory access to the area of Trafford Park to the north west of the station is limited.

6.62 Accessibility planning using Government approved Accession software is becoming a key tool in the transport planning process. It assists local authorities and other agencies in drawing together transport, land use and socio-economic information to identify the ease of access which the local population are afforded to key services such as jobs, education and healthcare. It functions essentially by modelling the journey times to a selected destination (or destinations), using only public transport and walking, from a grid of origins spread over a wide area. By comparing journey times from all origin points, contour maps can be constructed which show, cartographically, the journey times which the model is returning over the area as a whole.

6.63 In order to fully understand the existing levels of public transport accessibility within the study area, an Accession model has been constructed which models all public transport services currently operating in the Greater Manchester area. Public transport journey time isochrones have been derived and these are shown on Figures 6.13 to 6.15. They show the surrounding area within a 10, 20 and 30 minute travel time of three parts of the study area, namely:

- The centre of Trafford Park;
- The Trafford Centre; and
- Old Trafford / White City.

6.64 Figure 6.13 highlights that there are only limited parts of the surrounding boroughs of Manchester and Salford within a 30 minute public transport journey time of the centre of Trafford Park. This area has a resident population of just over 167,000 people, based on the

2001 Census. In contrast Figures 6.14 and 6.15 and the analysis presented in Table 6.3 highlight that the Trafford Centre and White City areas of the Trafford Park study area have larger catchment areas and resident populations within a 30 minute public transport journey time. Notably, the White City isochrone analysis highlights that the area and population within a 30 minute catchment are almost double that of the centre of Trafford Park. This is despite there being only approximately 2.5km between the destination points for each scenario.

Table 6.3: Public Transport Accessibility Analysis

| Bands (mins) | Trafford Park -Centre | | Trafford Centre | | White City | |
|-----------------|-----------------------|------------|-----------------|------------|--------------|------------|
| | Area (sq km) | Population | Area (sq km) | Population | Area (sq km) | Population |
| 0-10 | 3.3 | 918 | 2.0 | 3,739 | 3.0 | 6,461 |
| 10-20 | 12.8 | 29,378 | 20.7 | 49,936 | 26.1 | 81,701 |
| 20-30 | 36.4 | 136,821 | 42.4 | 148,423 | 61.5 | 223,644 |
| Within 30 | 52.5 | 167,117 | 65.1 | 202,098 | 90.6 | 311,806 |

6.65 This analysis confirms the earlier conclusion in this section that the western and eastern parts of the study area are more accessible by public transport than the centre. This is an issue that should be addressed and considered in future plans for the Park.

6.66 The Greater Manchester Passenger Transport Authority/Executive, Salford City Council, Trafford Metropolitan Borough Council and Greater Manchester Chamber of Commerce commissioned consultants MVA in 2006 to conduct an accessibility study in Trafford Park and Salford Quays. The aim of the study was to identify barriers to accessing employment in the Trafford Park and Salford Quays area. Part of the study involved engaging with stakeholders and undertaking surveys.

6.67 The study outlined a number of transport and non-transport measures to assist with addressing the identified problems. The key recommendations of the study were:

- Introducing two shuttle bus services: a loop shuttle bus service around Trafford Park; and a service linking Stretford Metrolink stop with Eccles Interchange, via Barton Dock Road, Trafford Centre, Guinness Road and Centenary Bridge; and
- Consideration is given to establishing a Social Enterprise Company which will work to improve transport provision to employment sites in the area.

Links to Other Development Activity

6.68 Media City, Irwell City Park and Port Salford are three key development proposals that will need to be integrated with the proposals that emerge for the Trafford Park masterplan area from a transport perspective. In particular, Media City and Port Salford will increase the volume of trips being made within the area. Many of these will be vehicle trips. The trip

generation from these sites could lead to increased road congestion and unless action is taken to address public transport capacity and increased overcrowding on bus and Metrolink services. The proposals to increase the capacity of the Metrolink services are clearly important in this context..

6.69 In relation to the Port Salford development it is understood that there are significant rail and highway infrastructure proposals. A rail spur is proposed on the Liverpool to Manchester line approximately 2km west of Patricroft station. The highway proposals include new arrangements at Junctions 10 and 11 of the M60 and a new bridge crossing over the Manchester Ship Canal. These infrastructure measures are also known as the Western Gateway Infrastructure Scheme or WIGIS.

Current Travel to Work Patterns

See Figures 6.15 to 6.19 - 'Trafford Park Travel to Work Patterns' over page

Mode Share in the Study Area

6.70 Our baseline assessment has included analysis of 2001 census data for the area. The census includes data on travel patterns, and can be interrogated to give data at a range of geographical scales, from single output areas or electoral wards to the whole country. The method of travel to work is the first data source from the census analysed. The masterplan study area has been defined as the census output areas which most closely fit the boundary of the study area.

6.71 For the purposes of this mode share assessment, we have analysed data for all trips bound for Trafford Park area and those that travel within the Greater Manchester area. The mode share for the daytime population (i.e. those people that work in the area) is shown on Figures 6.16 and 6.17. It can be seen that the mode share characteristics for all trips compared to those that travel from within the Greater Manchester area are surprisingly similar.

6.72 The mode share for work related trips to the Trafford Park in 2001 was as follows:

- 80% travel to work by Car;
- 12% travel to work by public transport;
- 4% cycle to work; and
- 2% of the population walk to work.

Trip Origins

6.73 The origins of trips bound for the Trafford Park area are shown on Figures 6.14 to 6.18. The analysis of the 2001 Census travel to work data highlights that a significant number of trips bound for the Trafford Park area originate from the boroughs of Trafford (27%) and

Salford (24%). 12% of trips originate from within the City of Manchester . The key origins are summarised in Table 6.4 below:

| Table 6.4: Key Origins of Travel to Work Trips | |
|-------------------------------------------------------|---------------------------------------------------------|
| ORIGIN (WARD) | % of POPULATION TRAVELLING TO TRAFFORD PARK AREA |
| Trafford | 27.1% |
| Salford | 23.6% |
| Manchester | 12.0% |
| Stockport | 5.9% |
| Bolton | 5.2% |
| Wigan | 5.0% |
| Tameside | 4.1% |
| Other Areas | 17.1% |

6.74 Figures 6.14 show the origins of all trips with Figure 6.15 zoomed in to focus on the origins of trips made from the Greater Manchester area. Approximately 30,000 people are currently employed within the masterplan area with around 85% of these travelling to the Park from within Greater Manchester. The wards which are shown to be generating the highest volume of trips bound for Trafford Park include the areas of Calderbank, Davyhulme, Flixton, Urmston and Lostock in Trafford Borough. In the Borough of Salford the areas generating the highest number of trips to the masterplan area include Eccles, Barton upon Irwell, Patricroft, Ellesmere Park, Peel Green and Winton.

6.75 Separate maps have also been generated demonstrating travel patterns by car, public transport and walking and cycling and these are shown on Figures 6.16, 6.17, and 6.18, respectively. The following conclusions can be made from these maps:

- A large number of short distance trips are made by car;
- Manchester, Salford and Trafford generate the highest numbers of public transport trips bound for the Trafford Park area, with very few public transport trips made from the other boroughs of Greater Manchester;
- The majority of walking and cycling trips are made from an area which falls within a 5km radius of the centre of Trafford Park. However, it is noted that a reasonable proportion of trips do travel from outside a 5km radius.

Travel Planning and Encouraging Sustainable Travel

6.76 Consultants working on behalf of a steering group comprising of the Highways Agency, Trafford Council and GMPTE are currently engaged in developing travel plans for

four partner companies and an over-arching area travel plan. The four partner companies being: Kellogg's; Hilti; MUFC; and Chill Factor.

6.77 Travel surveys have been undertaken at each of these organisations to determine trip patterns of the employees, including usual mode of travel, the availability of PT or a car and perceptions of public transport. Based on the findings from the travel surveys travel plans are being developed which include setting realistic targets for the reduction in single occupancy car trips, making employees aware of travel options, identifying car-share initiatives and recently, addressing the concerns in relation to the high cost of fuel.

6.78 In July 2008 Hilti hosted a travel awareness week for their employees. Personalised journey planning (provided by GMPTE), a car share scheme, a bike doctor and walking lunch were some of the activities and initiatives. It is the intention to hold similar events at the other companies during the Autumn to coincide with the development of their travel plans.

6.79 Given the public and private sector involvement in this initiative there is a desire to improve access to the area by more sustainable modes of travel. In developing the masterplan for the area the role that travel planning, and in particular an area wide travel plan, can play in encouraging sustainable travel and increasing mobility should be carefully considered.

Utilities Infrastructure

6.80 Trafford's Local Infrastructure Plan provides part of the evidence base to inform the preparation of spatial policy in the LDF, assessing infrastructure capacity for the Borough. It includes an assessment of telecoms, gas, electricity and water supply in Trafford. Trafford MBC, who have coordinated the Infrastructure Plan, have been reliant upon the cooperation of the respective utilities companies (Distribution Network Operators, or 'DNOs') to provide the information on assets and respective capacities in Trafford.

6.81 Information provided by British Telecom reported that adequate telecoms infrastructure is currently available in Trafford.

6.82 There are 5 main gas transmission assets located within Trafford, along with 4 main electricity transmission assets and 3 major electricity sub-stations. Information from DNOs suggests that developments in Trafford would not in principle represent a major issue for either the gas or electricity network, however no detailed network utilisation or capacity information was provided to substantiate this. It will therefore be important for key public sector stakeholders to engage closely with the respective gas and electricity DNOs, possibly on a confidential basis, to obtain more detailed utilisation and capacity information for Trafford; to analyse the potential impact of any new proposed development on the Park's

utilities infrastructure; and so to determine whether any new infrastructure developments / reinforcements are required to meet increases in demand and changes in supply patterns.

6.83 Feedback from United Utilities has suggested that no major potable water provision issues are envisaged for Trafford under current anticipated growth levels, although more localised network reinforcements may be required in the event of any significant new developments on the Park. In terms of wastewater, there is a major wastewater treatment facility (WWTP) located in Davyhulme, adjacent to the Park. This serves a large area across south and west Manchester, and has been significantly upgraded over the past 10 years following investment by United Utilities. Whilst there are no current issues in terms of wastewater capacity on the Park, and the Davyhulme waste works currently have scope to accommodate an amount of additional capacity, there is limited scope to increase capacity at the works beyond this. This means that the nature and scale of development and associated future increased demands across a large area - and not just Trafford borough - have the potential to impact upon wastewater service provision in Trafford.

6.84 A range of waste management facilities exist within Trafford Park. The Greater Manchester Joint Waste Development Plan will explore the need for further waste management facilities across the sub-region, the types of facilities required and potential sites.

6.85 Consultation is ongoing with infrastructure providers relating to the demand for and future development of renewable energy facilities.

6.86 The Trafford Quays site has been identified as an area in need of a Utility Impact Assessment prior to any further development, including an analysis of electrical distribution capacity as well as water and wastewater resources, treatment and supply capacity. It is thought that key private sector companies with extensive interests in Trafford Park already hold a significant amount of information regarding utilities in this area, but the Study Team have as yet been unable to access this to undertake a basic analysis to underpin and further inform this report.

6.87 In summary, there is an emerging body of evidence relating to the provision of utilities infrastructure to serve the Park. As yet, none of this information suggests that there are capacity issues relating to the supply of gas, electricity, water or telecoms on the Park - although it is recommended that an impact assessment be made for the Trafford Quays site. However it is recommended that there is closer engagement with utilities providers in the future to further develop this knowledge and to identify early any issues and constraints relating to supply as a result of any planned major development on the Park. The final masterplan should include a full utilities and energy audit for the Park, and needs to allow sufficient resources and timescales to enable this.

Green Infrastructure

6.88 Although the Park is primarily an industrial and commercial business park, it will still be important to explore the potential to protect and enhance existing key environmental assets within the Park where appropriate and to provide new green spaces that may deliver a wide range of environmental and social benefits particularly to serve any new residential development as well as businesses on the Park. Work is currently being undertaken at a Greater Manchester level in developing a Green Infrastructure framework and the Ecology Park and Irwell City Park Initiative in particular represent important environmental projects / assets on the Park.

Summary

6.89 Our baseline assessment of transportation in the study area reveals an industrial area with many positive attributes for mixed use development, in particular:-

- Potential for significantly improved public transport accessibility with the proposed extension of Metrolink and a new interchange at White City.
- Relatively low levels of traffic congestion within Trafford Park.
- The Trafford Park environment is in some places favourable for walking. In particular, traffic levels are relatively low, walking paths are wider than average, and the historic buildings within Trafford Village create a pleasant environment for the pedestrian
- High quality and quantity of some of the cycle paths within and surrounding the Trafford Park area

6.90 However, a number of specific areas for improvement are identified, most particularly:-

- Pedestrian severance. Caused by the major roads around Trafford Park without pedestrian crossing facilities at junctions, uninviting industrial environment of the area.
- The size of Trafford Park area. This inhibits the encouragement of alternative sustainable modes of travel such as walking or cycling in addition to the general uninviting industrial environment of the site.
- The Waterways. Despite Trafford Park being surrounded by canals and substantial waterfront coverage access to water frontages is restricted by private ownership of adjacent land. Pathways are present, but unmarked and not clearly accessible. The potential for mixed use development along the canals is great.
- Traffic speed and type of traffic. Current speeds of passing traffic and high numbers of large lorries create an unsafe cycle and walking environment within the area and further increase pedestrian severance.

- The rail station. Current levels of rail service at Trafford Park and Manchester United FC Station are too infrequent to provide reliable service to the masterplan area.
- Public Transport Accessibility. Improved public transport provision is required to the masterplan area by more sustainable modes of travel to improve accessibility and derive mode shift from car travel.

6.91 The Masterplan should also consider the potential to improve the green infrastructure on or around the Park as well as providing a more detailed utilities and energy audit, in particular considering the impact on the network(s) of any new proposed development.

7 PROPERTY MARKET ANALYSIS

Introduction

7.1 Trafford Park is located approximately 3 Km (2 miles) South-West of the City Centre and is the traditional prime industrial location in Greater Manchester with by far the largest concentration of industrial and warehousing space in the area. The estate covers over 485 hectares (1,200 acres) and was the world's first purpose built industrial estate, opening in the late 19th Century.

Context

7.2 Following a period of decline which preceded the designation of Development Corporation status between 1987 and 1998, the Park underwent significant regeneration, attracting over 1,000 companies, 28,250 new jobs and £1.759 billion of private sector investment. The Park now hosts a greater diversity of uses and occupiers including over 1,400 companies and employing over 44,000 people, but in order to continue to compete with ongoing developments elsewhere in Greater Manchester and the wider North West region the Park needs a clear and robust direction for the 21st Century.

7.3 Greater Manchester benefits from one of the most comprehensive local motorway networks in the UK, with links to the M6, M60, M61, M62/M602, M56 and M57 motorways. Manchester's two mainline railway stations, Piccadilly and Victoria, both serve the national rail network, with Piccadilly offering half-hourly intercity services to London Euston with a travel time of approximately 2 hours 15 minutes.

7.4 Manchester's Metrolink (tram) System serves the Greater Manchester conurbation interlinking Manchester's two main railway stations with Bury to the North and Altrincham to the South. The network now carries over 13 million passengers annually and there are proposals to extend the service South to Manchester International Airport, the Trafford Centre via Trafford Park and East Manchester via Sportcity to Ashton Under Lyne.

7.5 Manchester International Airport approximately 14 Km (9 miles) south of the City Centre is the 3rd largest in the UK with a current throughput of over 22 million passengers (2005) and 140,000 tonnes of freight (2004). This capacity is forecast to increase to 42 million and 250,000 tonnes respectively by 2015.

7.6 Trafford Park also has excellent freight links to both road and rail, with the World Freight Centre - which was opened in 1993 following support from Trafford Park Development Corporation - the UK's largest road/rail interchange complex outside London.

7.7 The city-region is also well served by the national canal system, including the Manchester Ship Canal, which was historically a very important resource for the region. The

canal when it was completed in 1894 was the largest navigable route in the world, capable of carrying seafaring ships from the Mersey all the way up to the docks at Salford. The decline of the heavy industries in the area, the increasing size of freight carrying ships and competition from road transport brought about the decline of Salford Docks and they closed in 1982. The use of the Canal until very recently was for limited smaller freight and leisure uses, however the past 2 years have seen the beginnings of a new era for the Canal (now owned by Peel), with Tesco in late 2007 beginning to use the canal for transporting New World wine between Liverpool and the Irlam Container Terminal, saving an estimated 700,000 miles (1,130,000 km) of road haulage per year. Peel are hoping to start work in the coming months on 'Port Salford', a multi-modal freight terminal at Barton, which would open in 2010.

7.8 Over the next few sections of this report, we concentrate on providing a Trafford Park focussed summary of the different property uses, the range of accommodation provided and how these can be put into context with the current market, economic factors and neighbouring developments.

7.9 Finally, we will provide a commentary of market based research that considers the strengths, weaknesses, opportunities and threats that the Park offers from a property perspective. This considers views from investors such as the institutions, property companies, owner-occupiers and businesses.

Accommodation

7.10 We have divided the Park into a number of constituent parts in order to summarise the types of accommodation, uses and different aspects of the built environment.

Manchester Ship Canal

7.11 From the junction with the Bridgewater Canal to the west and the A5063 to the east the majority of the accommodation located on the banks of Manchester Ship Canal provides heavy industry and manufacturing facilities eg. Cerestar/Cargill, Rank Hovis.

Barton Dock Road

7.12 Excluding the Trafford Centre and Peel Rectangle, traditionally the accommodation along the southern fringe of the Park has been dominated by owner-occupiers or distribution occupiers such as Kelloggs, Kuenhe & Nagel, Fermec etc. These industries are slowly giving way to other uses and have seen either the break-up of sites to provide smaller scale industrial accommodation or alternative uses such as offices eg. Anaconda Alley, Cobra Court. Opportunities have still arisen to provide modern, high quality distribution warehousing such as Merlin 360 (TDG), Westinghouse Road (Adidas), Electric Park (L'Oreal, Kelloggs).

MUFC/MIFT

7.13 To the south-eastern fringe of the Park is a large swathe of land comprising the Manchester International Freight Terminal and Manchester United Football Club. Covering a total area in the region of 128 acres, this area of the Park provides the odd mix of heavy container transport and the number 1 globally recognised football brand that is Manchester United.

Trafford Centre/Peel Rectangle

7.14 To the south-western fringe of the Park is the 500 acre estate owned by Peel Holdings. Known as the Peel Rectangle, this area of the Park has been developed over the last 10 years and comprises the £1.6bn, 115,200 sq m/1.24m sq ft Trafford Centre and new £76m Barton Square addition (18,580 sq m/200,000 sq ft), numerous leisure destinations (JJB Soccer Dome, David Lloyd Leisure, ChillFactore, Playgolf), a number of budget end hotels (Golden Tulip, Travelodge etc), Asda and Costco superstores, Venus Building (9,290 sq m/100,000 sq ft) Grade A office building) and proposals for a further 9,290 sq m/100,000 sq ft office development on the former Kratos site to the eastern edge of the rectangle close to the A5081 (Parkway) linking to junction 9 of the M60.

Wharfside

7.15 This area comprises a triangle between Manchester Ship Canal to the north, MIFT and MUFC to the south and Europa Way/Warren Bruce Road to the west. This area comprises a mix of uses including light industrial, leisure, offices and football stadia. There is also a substantial mix in quality of accommodation and in our opinion there is a clear opportunity to regenerate this area.

Inner Core Industrial

7.16 This is the industrial heartland of the Park comprising a broad mix of industrial accommodation of all ages, quality and sizes and a range of industrial and manufacturing occupiers. In addition, this part of the Park includes The Village. This is an area bounded by Europa Way, Westinghouse Road, Village Way and Praed Road. The Village was developed using a grid road pattern and the road names are first to fifth avenue and first to eleventh street. Within this grid pattern are a mix of uses from industrial to offices and some amenities including a couple of high street banks.

General Property Market Overview

7.17 A significant slowdown in financial and business services activity and consumer spending will curb economic growth this year and next. With the Bank of England's Monetary Policy Committee (MPC) struggling to control mounting inflationary pressures, and against a backdrop of falling house prices, we expect the UK economy to grow 1.2% in 2008, and sub

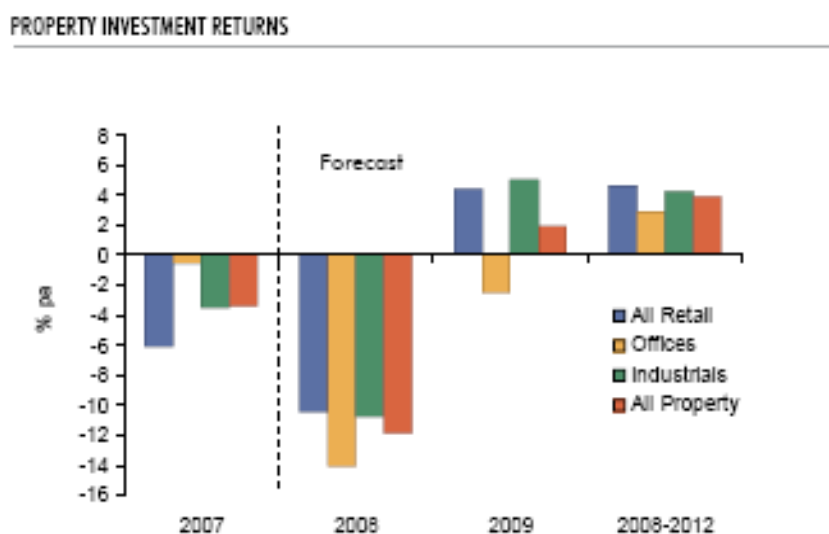
1% in 2009. Recessionary fears in the US persist, whilst surging Eurozone inflation persuaded the ECB to raise interest rates at a time when output is expected to weaken sharply.

7.18 Given the current fragile economic backdrop, more restrictive lending conditions and weakening occupier markets, H1 (first half-year) 2008 investment volumes were down 60% compared to the same period last year. Until credit conditions improve and business activity stabilises, it may be sometime before buyers and sellers price expectations realign, and there is a measured improvement in transactional volumes.

7.19 Greater uncertainty in occupier markets combined with rises in bond yields and five year swaps, have forced a re-acceleration of outward yield movements during Q2. All Property capital values declined 8.6% in H1 2008, with the decline since June 2007 19.3%. Our current forecast is that capital values will decline 17% in total this year, with the greatest correction occurring in the office sector, and principally Central London, triggered by substantial falls in office rents.

7.20 CBRE's All Property total return forecast for 2008 is -11.9%, with further capital value declines in 2009, albeit marginal, delivering a total return of 1.9%. However CBRE foresee office returns to remain negative next year, reflecting the continued slide in rents. On a more positive note, CBRE foresee an improvement in the wider economy leading to a stabilisation of property yields by 2010. Given the degree of re-pricing that has already occurred, and the weight of money reported to be poised to re-enter the UK market, signs of investor interest may reappear in 2009, although this is likely to be restricted towards the prime assets.

Figure 7.1 Property Investment Returns



7.21 The economic environment in the UK continued to deteriorate in the second quarter of the year, supporting fears of stagnant output in 2008. Q1 GDP growth was revised down to

just 0.3% and evidence from the CIPS PMI surveys suggests that both the service and manufacturing sectors contracted in Q2. Any opportunity for the Bank of England to boost the economy with further rate cuts has been constrained by rising inflation, which reached 4.4% on the CPI in July, the highest since April 1992. BoE forecasts suggest that this could increase further in coming months. Given the explicit target rate of 2%, it is very unlikely that any interest rate cuts beyond the current 5% will be forthcoming in the short term.

7.22 The housing market also continued to slide in Q2 with mortgage approvals reaching new lows and house prices now 6.2% lower than a year ago according to the Nationwide index. Consumer confidence in the UK has also fallen sharply to levels not recorded since the early '90s recession. This weakness was illustrated in the June retail sales figures, which after the surprise May rise, recorded the largest monthly decline since the series began in 1986. Investment markets have reacted to the economic uncertainty and growing inflationary pressures with heightened volatility.

7.23 The price of oil rose exponentially over the first half of the year to new records around \$140pb. Despite rallying early in Q2, equity markets have been in turmoil for much of the first half of the year. The FTSE 100 ended June more than 13% lower than at the beginning of 2008 and has since fallen markedly as troubles in the mortgage market and investment banks have continued. A similar picture is evident throughout global economies, with both the US and Eurozone facing falling output growth and rising inflation.

7.24 The ECB even raised interest rates in July, despite ominous signs of slowing activity across the region.

7.25 While the initial economic fallout from the credit crunch impacted on profitability in the financial sector, the follow through in terms of job losses and ultimately to the consumer economy, is only now starting to be felt. The UK housing market was an early casualty, stalling in the final quarter of 2007. It is unlikely that confidence will return to the housing market in the near term and CB Richard Ellis anticipate house prices will be 10-15% lower by the end of 2008 on the Nationwide index.

7.26 Given the strong link between house price inflation and retail sales, particularly in recent years where mortgage equity withdrawal has supported the retail economy, it is anticipated that household spending levels will soon falter. By the second half of this year, the consumer slowdown will be in full effect and spending is expected to remain weak until 2010. The rise in inflation brought about by record high oil prices, will likely continue through 2008 and early 2009, until the severe slowdown in domestic demand provides a counter balance to these externally generated inflation effects. Our June UK GDP growth forecast is 1.2% in 2008, down from 3% last year. However, given the recent shift in economic sentiment, this level of expansion may even be difficult to achieve. Output will slow even further in 2009,

unaided by any improvement in household expenditure, before a modest recovery in 2010, supported by lower interest rates.

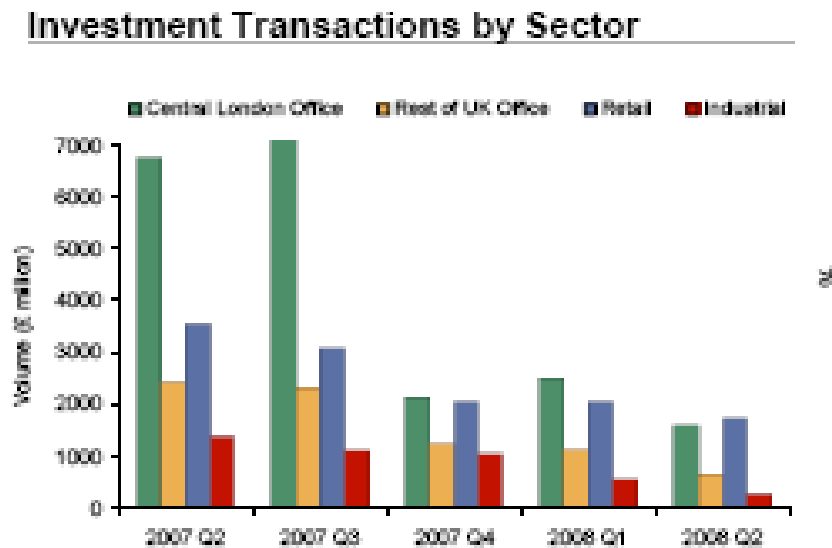
7.27 With much of the current inflationary spike externally generated, there is little the BoE can do to offset this in the short term. The risks of a UK recession have risen substantially during Q2, and the prospect of lower interest rates next year will do little to stimulate output given fears surrounding the severity of a collapse in consumer sentiment and business activity. There is the growing threat that the UK economy will contract in the second half of this year, which would require further downgrades to output projections, and ultimately dampen our market rental projections.

7.28 Investment into UK commercial property continues to slow, recording its lowest level in over seven years in Q2 2008. Just over £12bn traded hands in the first six months of the year, compared to £31bn in the same period last year. Central London offices continue to attract the greatest investor attention, around a third of the total, although this represented just £1.6bn. Regional offices attracted less than £700m of investment.

7.29 The debt environment in the UK continues to be challenging, with the Q2 Bank of England survey showing that lending intentions for commercial property are still very weak and LIBOR continues to hover around 80bp above the base rate. On account of the reduced availability of debt, Shopping Centres and Central London offices, which typically have the largest average lot sizes, have seen the sharpest drop in activity.

7.30 The few transactions involving properties over £100m now require a sizeable discount to ensure completion. Shops registered the smallest shift in prime yields over the quarter, as their smaller average lot size makes them easily accessible to equity buyers currently in the market. Industrial transactions totalled just £260m in Q2. The market was again, largely supported by overseas buyers who invested a net £1.8bn –although this is still less than half the level of Q2 last year. Private property companies and individuals were also fairly active in the first half of the year. Reflecting the ongoing troubles in the quoted real estate sector, publicly listed property companies were large net dis-investors in Q2, as were Institutions.

Figure 7.2 Investment Transactions by Sector

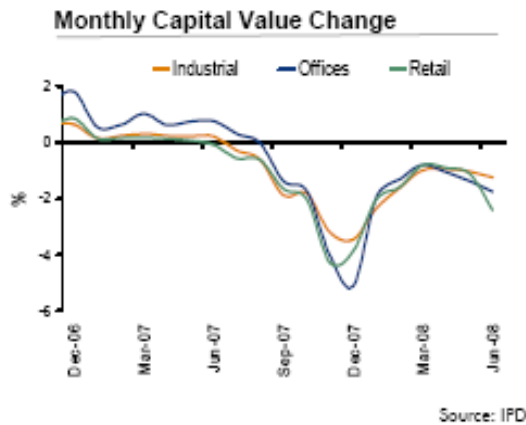


7.31 All Property equivalent yield rose a further 30 basis points to 6.9% in the three months to June, according to the IPD Monthly Index, from 5.4% last summer. Although marginally down on the Q1 correction of -4.8%, All Property capital values have now fallen 8.6% in the year-to-date, and 19.3% since June 2007. With evidence of rents stalling, and even turning negative in some sectors, All Property has returned -3.4% and -2.7% respectively in Q1 and Q2, with an annual return of -14.9%.

7.32 Sharply falling rents in the Central London office market, reflecting weaker financial sector employment prospects and an increase in supply, have ensured office yields continued to climb. An All Office equivalent yield of 7%, up from 6.35% at the start of the year, has dragged capital values down 8.4% in the year-to-date, and -18.9% y-o-y. With rents falling -1.9% and -0.8% in the City and WE in Q2, H1 2008 capital values fell -9.2% and -8.6% respectively. Of the three broad sectors, retail has recorded the largest fall in capital values, with a 9% decline in the year-to-date.

7.33 Shopping Centres in particular suffered a sharp re-pricing during Q2. With very little evidence or prospect of rental growth, given the downside risks to consumer spending going forward, All Retail returned -6.4% in the six months to June, -16% y-o-y. High Street shops, retail warehouses and shopping centres have returned -4.2%, -6.8% and -7.6% respectively in H1 2008. Matching All Offices, industrial capital values have fallen 8.4% in H1 2008 as the All Industrial yield has risen from 6.9% to 7.56%. Although the degree of industrial capital value falls did moderate marginally to -3.2% in Q2, values are now 18.3% lower than the same period last year.

Figure 7.3 Investment Transactions by Sector



7.34 Continuing economic distress following on from the dislocation in credit markets, and escalating inflationary pressures, will continue to overshadow the market in 2008 and 2009. Although the decline in commercial property capital values did moderate marginally in Q2 as a whole compared to Q1, the sharp downgrade in June valuations implies the market is still some way from finding a floor. CB Richard Ellis forecast that the combination of a reduction in occupier demand brought about by the slowing economy, and on-going cautious investment activity, will drag capital values down 17% this year.

7.35 The greatest correction is expected to be recorded in the office sector, reflecting further significant yield adjustments brought about by a projected sharp fall in rents over the coming two years. Demand for space across the retail and industrial sectors is also forecast to soften, with falling house prices and rising production costs curtailing future rental growth prospects. With a muted financial and business sector, and weak consumer spending, CB Richard Ellis expect All Property rental growth will be -1.7% this year, and -3.1% in 2009 due to weak occupier demand in the Central London office market.

7.36 Although we forecast an improvement in the wider economy in 2010, we do not foresee rental growth recovering until 2011. All Property 5 year annualised rental growth is anticipated to be just 0.7%. We believe that constrained lending conditions will linger well into 2009, and contribute to further outward yield movements, with the All Property rising by 130bp this year to 7.3%, and finally to 7.5% by end next year. The short term outlook for commercial property is skewed to the downside, especially given the rise in bond yields and 5 year swaps. Similarly, with the deterioration in the rental outlook, it is now quite unlikely that property will benefit from an improvement in investor sentiment in the immediate future.

7.37 However, from 2010, property pricing should look increasingly attractive compared to alternative assets. In our central assumptions, CBRE forecast that All Property will produce a return of -12% and 1.9% respectively this year and next, before recovering to 10% by 2010. The recovery in returns from 2010 reflects a marginal reduction in yields, but significantly higher income return compared to the recent past. Should the degree of anticipated re-pricing over-shoot in the short term, we may begin to see the green shoots of a sharper recovery in investment activity slightly earlier than 2010.

Figure 7.4 Total Returns Outlook



Figure 7.5 Investment Transactions by Sector

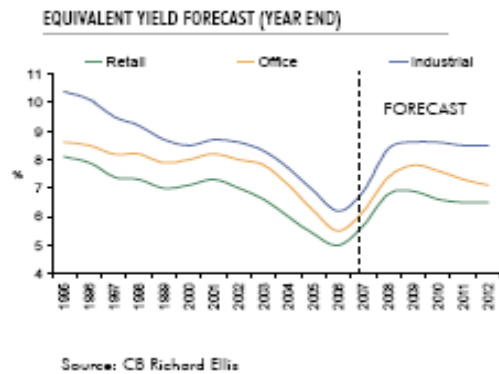
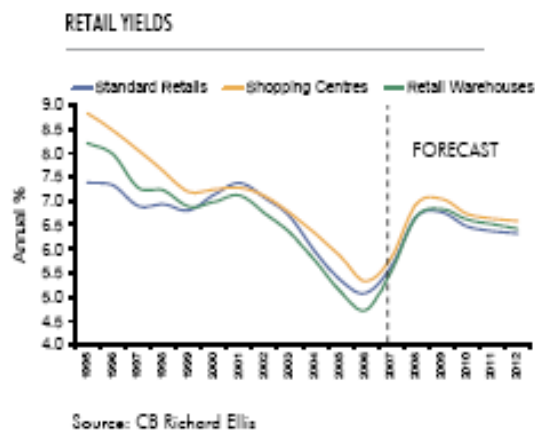


Figure 7.6 Rental Yields



7.38 Weaker disposable incomes will impact upon all retail sub-sectors. The retail warehouse sector, and especially the bulky goods market, will continue to struggle given its strong linkages to the housing market, whilst shopping centres and the High Street will ultimately suffer as peoples spending habits are curbed as the economy slows abruptly.

7.39 Opportunities for rental growth within the retail sector are therefore likely to be limited, with a wider disparity emerging between prime centres, and especially core Central London, and secondary, poorly managed markets. We should witness an improvement in the rental outlook across all retail sub-sectors as the economy improves from 2010, but 5 year annualised All Retail rental growth is projected to be just 1.6% pa. In view of the bleak near term outlook for retail sales, retail yields have some further way to rise, even in the context of significant re-pricing that has already occurred.

7.40 We forecast that the All Retail IPD equivalent yield will rise 110bp to 6.8% this year, dragging capital values down -15% in 2008, having fallen 10% in 2007. With a further projected 2% decline in capital values next year, this translates into an All Retail total return of -10.5% and 4.4% respectively for 2008 and 2009. Prospects for the retail sector look brighter from 2010, when following three years of falling capital values, we feel that investor opportunities will have re-emerged in the market, buoyed by a pick-up in the underlying economy. This improvement in investor sentiment should lead to some sharpening in retail yields, which coupled with a higher income return, will deliver c10% returns between 2010-2012. Although there are clearly risks surrounding the consumer, the retail sector is projected be the best performing sector out to 2012 with an annualised return of 4.6%pa.

7.41 The industrial sector is facing a difficult outlook, with sharply increased costs and a slowing global economy. Consequently, the manufacturing sector is likely to be squeezed in the near term. There will be little prospect of a real increase in industrial rents, and we forecast that industrial yields will rise a full 150bp in 2008, delivering capital value growth and a total return of -16.9% and -11.9% respectively. However, following some further marginal

outward yield adjustment next year, an income return of nearly 8% by 2009 should assist in stabilising yields by 2010. Thereafter, industrials will produce solid returns of 8-10% out to 2012. There are clear downside risks to this projection, but the sectors relative stability and high income return will become increasingly attractive to investors, especially where leases have either fixed or RPI uplifts.

Figure 7.7 Retail Total Return

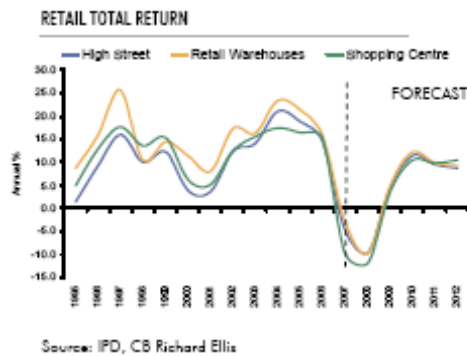


Figure 7.8 Retail Rental Value Growth

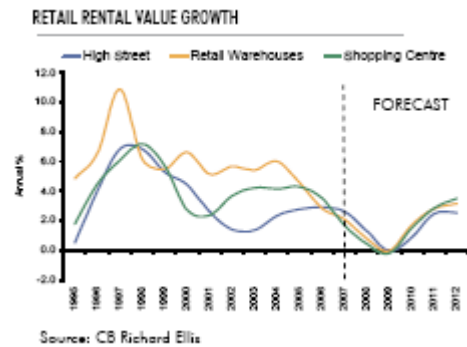
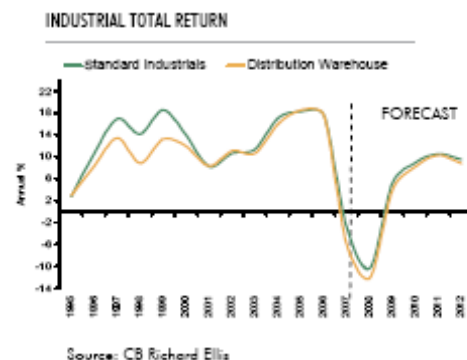


Figure 7.9 Industrial Total Return



Industrial Market Commentary

7.42 Within Greater Manchester, the total industrial stock according to PROMIS (Property Market Information Service, who produce market reports on a wide range of local markets) stands at approximately 7.78 million sq m (83.7 million sq ft) which ranks the area second in the PROMIS survey of industrial centres. These stock figures refer to the combined districts of

Manchester, Salford and Trafford. The stock can be broken down into factories and warehouses, with 46% defined as manufacturing/factories and 54% as warehouses. Only 5.4% of the total industrial stock is new, having been built in the last five years.

Trafford Park

7.43 With regard to Trafford Park, the area has tended to favour light industrial occupiers in recent years although some manufacturing remains. Larger distribution firms have tended to favour alternative locations due to the sparse number of suitable sites in Trafford Park and the higher cost of land. However, with a number of the conurbations major manufacturing employers present on the estate, Kellogg's, Proctor & Gamble and Trafford Park Bakery there is a need for large distribution units on the Park. This need has been demonstrated by four large deals achieved over the last 12 months.

- Adidas - pre-let of 33,445 sq m (360,000 sq ft) on Mosley Road
- TDG Logistics - lease of 28,800 sq m (310,000 sq ft) at Merlin 310 building on Barton Dock Road
- SCA Hygiene UK Ltd – lease of 23,272 sq m (250,500 sq ft) at the Excel Building, Ashburton Road West
- AK Worthington – lease of 27,870 sq m (300,000 sq ft) at Centrepoint on Westinghouse Road

7.44 Available new industrial accommodation is in short supply in Trafford Park. The principal opportunities are:

- Premier Park, Trafford Park Road – recently completed by Brixton Plc
- Central Park, Village Way – Easter Developments constructing three units totalling 8,825 sq m (95,000 sq ft) on behalf of Legal and General
- Fusion, Electric Park – completed in 2007 the property comprises a 19,323 sq m (208,000 sq ft) high bay warehouse unit.

7.45 Property Alliance Group has just pre-let a 6,500 sq m (70,000 sq ft) facility for MAN Truck and Bus UK on the former Northern Foods site on Ashburton Road West. The scheme which will include a 2,787 sq m (30,000 sq ft) office building fronting Ashburton Road West has just commenced on site.

7.46 There are also some substantially refurbished units available to let in the Park including:

- Centrepont Phase 4, Westinghouse Road – a 4,087 sq m (44,000 sq ft) unit refurbished by Threadneedle
- Unit 2, Hattons Road – a 40,000 sq ft unit under refurbishment by Brixton

7.47 There are three significant sites available for development:

- Brixton's six acre site at Electric Park which could accommodate a single unit of 9,290 sq m (100,000 sq ft) or two units of circa 4,645 sq m (50,000 sq ft)
- St Modwens' 11.40 acre site to the rear of Adidas.
- Property Alliances Trafford Central development on Ashburton Road West for circa 6,038 sq m (65,000 sq ft) of accommodation

7.48 With the exception of the above, the most recent additions to the industrial landscape of the Park are:

- Ashburton Park - developed by Easter/Prudential and completed in 2006 comprising 13,935 sq m (150,000 sq ft) in 26 units ranging from 371 sq m to 2,322 sq m (4,000 sq ft to 25,000 sq ft).
- Ashburton Point - developed by Marshall/Arlington and completed in 2006 comprising 20,903 sq m (225,000 sq ft) 19 units ranging from 464 sq m to 3,530 sq m (5,000 sq ft to 38,000 sq ft).

7.49 There is therefore an abundance of second-hand accommodation within the Park that transcends the generations of the Park's development over the last 100 years. There remain a number of brick-built bonded warehouses that are out-dated and not fit for modern occupiers, but with high land values and increasing build costs combined with a lack of rental growth and softening yields the market may not be sufficiently robust in the foreseeable future for the redevelopment of these buildings.

Rents

7.50 There is a broad rental range dependent on location, quality, age and size of accommodation. Prime rents now stand at £72.66 per sq m (£6.75 per sq ft) although rents in excess of £75.35 per sq m (£7.00 per sq ft) have now been achieved at Brixton's Premier Park.

7.51 New space at Centenary Park have achieved £59.20-£64.58 per sq m (£5.50-£6.00 per sq ft) for units ranging between 1,579 sq m to 4,970 sq m (17,000 to 53,500 sq ft).

7.52 Rents were achieved on Ashburton Park and Ashburton Point at between £61.89 per sq m to £67.28 per sq m (£5.75 per sq ft to £6.50 per sq ft) after completion in 2006/2007.

7.53 For second-hand space Brixton is achieving up to £61.89 per sq m (£5.75 per sq ft) for 1980s accommodation in the 5,000 to 10,000 sq ft range and £53.82 per sq m (£5.00 per

sq ft) for 1970s accommodation in the same size range. These rents are being achieved on multi-let estates.

7.54 We would suggest that rents on second hand space in the Park assuming a reasonable quality would be as follows:-

| Table 7.1 Rental Values on Trafford Park | | | |
|-------------------------------------------------|---------------------|---------------------|--|
| Unit Size (Sq Ft) | Rent (£/psm) | Rent (£/psf) | |
| 5-10,000 | £56.51-£61.89 | £5.25 - £5.75 | |
| 11-25,000 | £51.13-£56.57 | £4.75-£5.25 | |
| 26-50,000 | £48.44-£51.13 | £4.50-£4.75 | |
| 51-100,000 | £43.75-£48.44 | £4.00-£4.50 | |
| 100,000 + | £37.67-£43.05 | £3.50-£4.00 | |

Yields

7.55 Prime yields for new/modern industrial estates within the Park are likely to be in the order of 6.50-6.75% assuming rack-rented income with units let on minimum 10 year leases.

7.56 In general yields for multi-let industrial estates would be in the region of 7.00-7.50% again dependent on the quality of the accommodation, age of the estate, average lease length, quality of the income and potential for rental growth.

Office Market Commentary

7.57 In terms of secondary stock - which would be classified in terms of the poorer location, accommodation, lease terms, rental levels and covenant strengths - average yields would be 8.00-8.50%.

7.58 The Manchester out-of-town office market is a significant sector, with average levels of take-up in excess of 83,612 sq m (900,000 sq ft) per annum. It is believed that approximately 97,547 sq m (1,050,000 sq ft) of take-up was achieved in 2007 which is greater than the five year average of 85,748 sq m (923,000 sq ft).

7.59 Within the surrounds of Trafford Park, Salford Quays has traditionally been the location of choice for large-scale office development outside Manchester City Centre. The office supply in Salford Quays totals in the region of 160,000 sq m (1.72m sq ft). Major occupiers include BUPA, RBS, Barclays, Citibank, Marks and Spencer, JT Limited and Avis Europe.

7.60 Examples of supply include:

- The Anchorage – 23,225 sq m (250,000 sq ft)
- Exchange Quays – 40,482 sq m (435,000 sq ft)
- Metro Exchange – 6,735 sq m (72,500 sq ft)
- The Alexandria – 5,652 sq m (60,840 sq ft)
- Harbour City – 10,683 sq m (115,000 sq ft)

7.61 Major developments in the pipeline include:

- Media-City – 46,451 sq m (500,000 sq ft) offices, 20,903 sq m (225,000 sq ft) in Phase 1
- Greengates – 3.25m sq ft (2m sq ft of residential accommodation/1m sq ft of commercial accommodation)

7.62 With regard to Trafford Park, the most significant development that has the potential to substantially affect the office market in this locality is the re-location of a number of BBC departments to Peel's Media-City development just across the Manchester Ship Canal at The Quays. The BBC has signed up to approximately 41,806 sq m (450,000 sq ft) of office and studio accommodation at the 200 acre development and will re-locate between 2010 and 2012.

7.63 Despite Trafford Park being a predominantly industrial location, there is a sizeable amount of office space within its boundaries. The office accommodation on the Park most recently developed comprises pavilion style, two-storey developments. The most notable of these developments include Kiwi Park, Anaconda Alley and Cobra Court which were all developed by Marshalls. These were either leased off rents between £156.1-£161.5 per sq m (£14.50-£15.00 per sq ft) or sold Freehold off £1,776-£1,938 per sq m (£165-£180 per sq ft).

7.64 Cobra Court, completed in 2006/7, is an established Business Park and offers 16,165 sq m (174,000 sq ft) of office accommodation. Cobra Court is situated on Barton Dock Road, close to its junction with Parkway, which is a short distance from the M60 motorway and the Trafford Centre. To date the business park has attracted a range of office occupiers including Wimpey, FES and Beamfeature. The offices offer a high specification inclusive of air-conditioning, fully carpeted offices, and lift access, male and female and disabled WC facilities. These types of property have been attractive to small investors and pension funds over the last 18 months to two years because of the cheap levels and availability of finance that made buying rather than leasing the preferable option particularly with the advent of SIPP's making these opportunities tax efficient and giving businesses the opportunity to both own their own buildings and to benefit from capital growth through long term investment.

7.65 Peel Holdings Ltd completed the prestigious office development, Venus Building, in 2006. The property extends to 8,454 sq m (91,000 sq ft) and is arranged over eight floors offering floor plates in excess of 929 sq m (10,000 sq ft). The space is fully-let and achieved rents in the region of £188.4-£199.1 per sq m (£17.50-£18.50 per sq ft). Located adjacent to the Trafford Centre in the Trafford Quays area of the Park the building incorporates a full-height glazed atrium with first-class amenities, car parking and transport facilities. The building is a very high quality office product more akin to the high quality of buildings seen in the city centre, and was designed to - and has succeeded in - attracting blue chip tenants.

7.66 The Northern Irish property developer Benmore completed the development of a 3,901 sq m (42,000 sq ft) office scheme known as Wharfside in 2007 and has achieved the highest rent in the Park at £215.2 per sq m (£20.00 per sq ft) for approximately 696.8 sq m (7,500 sq ft). The property offers Grade A accommodation.

7.67 In terms of second hand supply, Quay West was the original office development in the Park. Arranged over nine floors and comprising 7,060 sq m (76,000 sq ft) the building achieves rents in the range of £172 per sq m (£16.00 per sq ft).

7.68 Other second hand accommodation in the Park includes Bruntwood's Broadoak Business Centre on Ashburton Road West, Midas House on Trafford Wharf Road and Property Alliance Group's Westpoint Enterprise Park on Ashburton Road West.

7.69 In addition to the above, Property Alliance Group has recently started on site the development of a 2,787 sq m (30,000 sq ft) office building on the former Northern Foods complex on Ashburton Road West. This building is being developed speculatively. The company also acquired the former Houghtons site also on Ashburton Road West and has the flexibility to develop either a trade park or an office scheme. If the office route is followed the scheme will provide approximately 8,361 sq m (90,000 sq ft) of accommodation in 12 units. This is a statement of confidence in the areas ability to attract office occupiers in the heart of the Park.

7.70 Peel Holdings has also recently obtained planning consent for the development of a 9,290 sq m (100,000 sq ft) office building on the former Kratos site close to Barton Dock Road and Parkway. It is uncertain whether Peel intends to develop this speculatively.

7.71 The impact of Media-City and the re-location of the BBC to the Quays is beginning to have a significant effect on the development of office accommodation in the area and this will undoubtedly impact on the Park.

Yields

7.72 Prime yields for office accommodation within Manchester City Centre let on 15 year income to a substantial covenant and rack-rented are currently in the order of 6.00-6.25%. It is believed that that similar accommodation within Trafford Park would achieve 6.25-6.50%.

7.73 Yields on secondary accommodation or poorer quality and location, shorter lease lengths and weaker covenants would be 7.00-7.50%.

Residential Market Commentary

7.74 Activity in the housing market is slowing as the credit crunch continues to hamper demand. This has led to house prices falling; so far there have been eight consecutive months of declining house prices with a total fall of 7.3%.

7.75 The combination of falling house prices and a weakening economy has led to confidence falling to an 18 year low; however repossessions are yet to increase significantly. Communication between lenders and borrowers is essential to prevent repossessions spiralling as redundancies begin to increase.

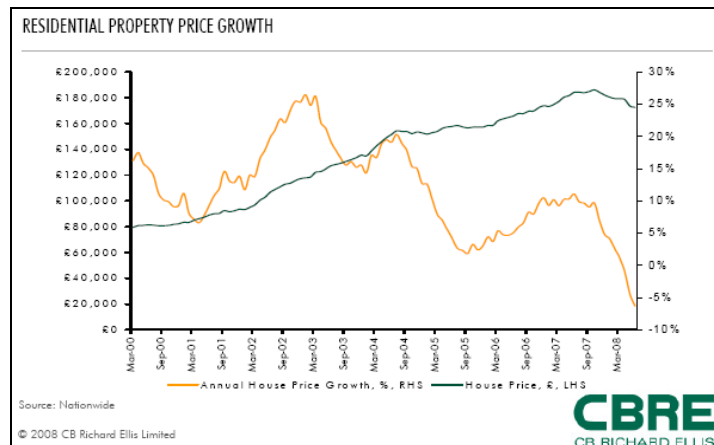
7.76 The similarities between now and the early 1990s mean house price growth is likely to follow a similar trajectory. But, there remain fundamental economic differences, which should prevent the downturn reaching the depths seen in the 90s crash.

7.77 We would expect house prices to fall by around 10% this year with further, but less significant, falls in 2009. We then expect a period of flat growth with the market picking up post 2010.

7.78 There are a number of options available to the government to stabilise the situation. For example, the re-introduction of income support for mortgage payments for home owners could weaken the link between repossessions and redundancies.

7.79 House builders are being squeezed at both ends of the development process; we expect housing starts to fall to lows not seen since 1980.

Figure 7.10 Residential Property Price Growth

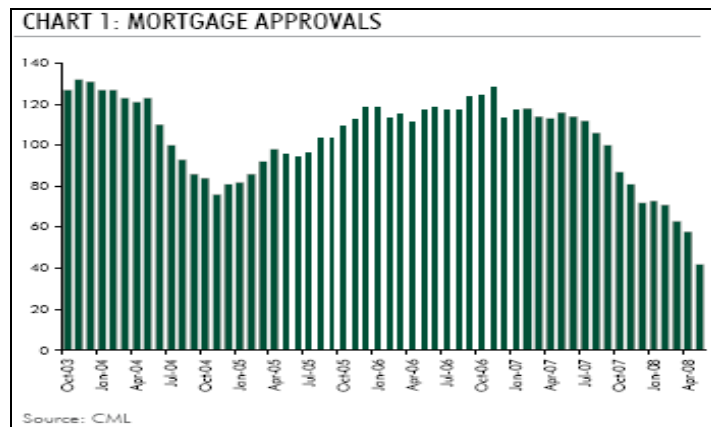


7.80 Activity in the housing market has continued to weaken over the last quarter. Mortgage approvals fell to 42,000 in May; a year on year fall of 64%. Similarly, the National Association of Estate Agents (NAEA) reports a 28% fall in the number of registered buyers. With stock failing to sell, there has been a 35% increase in the number of properties on agents' books. This has created a shift in the buyer and seller imbalance with conditions now favouring buyers. However, buyers remain hampered by the ongoing effects of the credit crunch.

7.81 The availability of credit to households has worsened over the last quarter and mortgage finance is becoming increasingly expensive, despite the 50 basis point fall in the base rate this year. For example, the difference between the average Standard Variable Rate (SVR) and the base rate in April was 139 basis points; a year ago it was only 84 basis points. This is due to the historically wide spread between the LIBOR and the base rate, which reflects the continued uncertainty among banks.

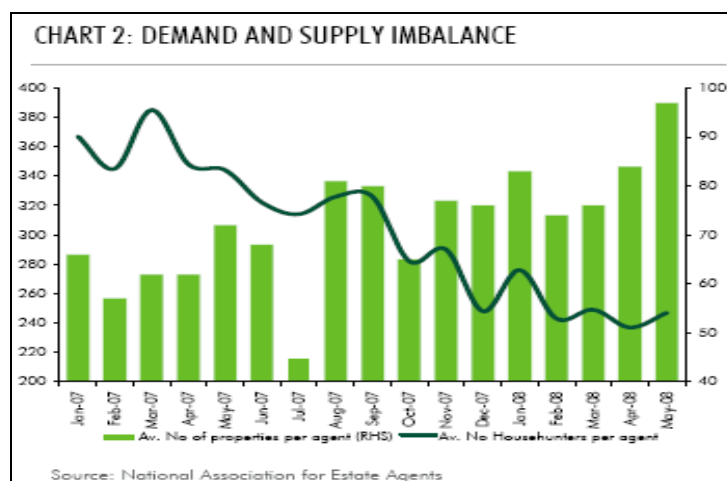
7.82 This has led to widespread price falls. So far there have been eight consecutive months of declining house prices; with a total fall of 7.3%. So far this year prices have fallen by 5.6%. The difference between asking prices and sale prices has increased. This implies sellers are not yet pricing realistically and buyers are able to drive a bargain. According to the NAEA, the difference between asking and sales prices for first time buyers is now 5.1%.

Figure 7.11 Mortgage Approvals



7.83 All the regions in England, Wales and Ireland are now recording year on year house price falls. The largest falls have been seen in Northern Ireland and Wales with falls of 18.6% and 7.6% respectively. The worst performers in England are in the North and East Midlands. London, despite very strong growth in 2007, is now more in line with broader national trends and recorded a 2.3% annual fall in house prices at the end of this quarter. Only Scotland is recording positive growth, albeit just 0.6%. This is largely because affordability in Scotland is more favourable than in other regions and so the correction could be less marked. However, the region has seen quarter on quarter house price falls for the last two quarters, so we expect negative annual growth next quarter.

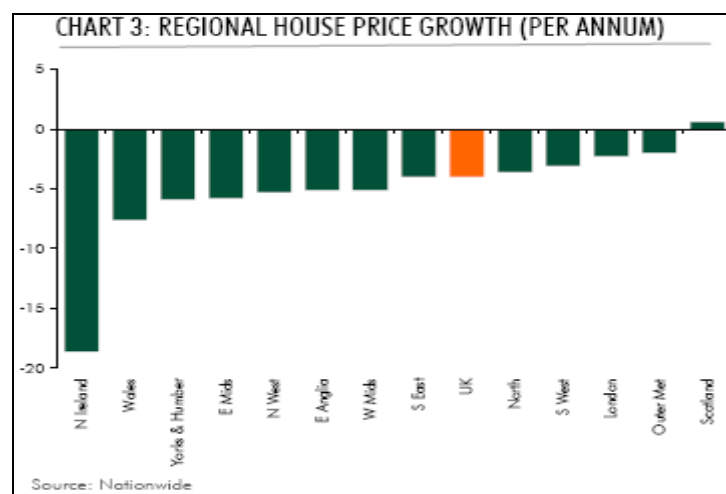
Figure 7.12 Demand and Supply Imbalance



7.84 There is a symbiotic relationship between the economy and housing market with weakness in one driving a weakness in the other. As Chart 5 shows, past economic and housing market recessions have closely mirrored one another.

7.85 The effects of the credit crunch and property market weakness are now feeding through to the wider economy. Even the retail sector, which until now has performed well, is beginning to suffer. There have been profit warnings from retail outlets, such as Marks and Spencer and John Lewis, which have led to the British Chamber of Commerce (BCC) suggesting a technical recession is on the way. We expect a mild and concentrated recessionary period at the end of this year and continuing weakness though 2009.

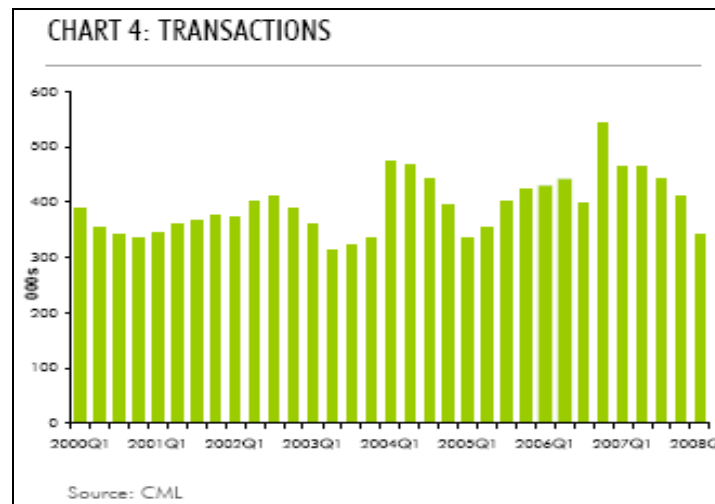
Figure 7.13 Regional House Price Growth (Per Annum)



7.86 The Consumer Price Index (CPI) rose to 3.8% in June, but it feels much higher for many people with food and petrol prices rising by 6.9% and 17% respectively year on year. However, despite strong inflationary pressures the Monetary Policy Committee (MPC) is between a rock and a hard place; falling house prices and a weakening economy rather precludes a rate cut any time soon.

7.87 The combination of housing market weakness, economic downturn and general bad news stories has fed through to consumers. Confidence is at an 18 year low. This in turn is affecting consumers' financial decision making: for example, housing equity withdrawal - which until recently had become a popular form of borrowing - has declined by 64% in the year to March 2008. Its decline reflects not only changing consumer sentiment but also fears of negative equity.

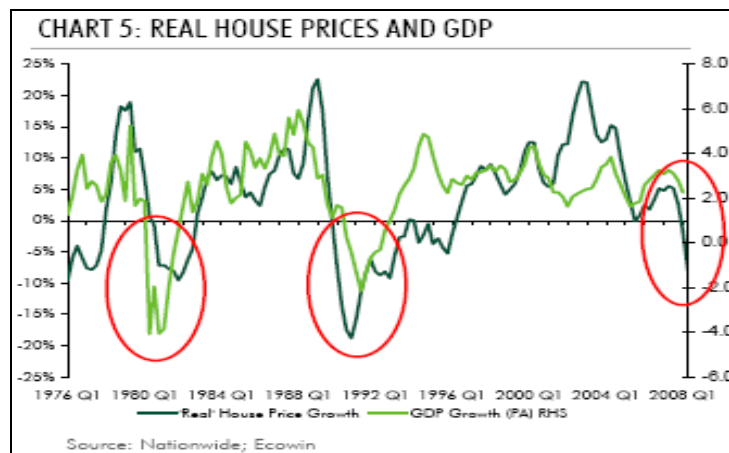
Figure 7.14 Transactions



7.88 There are certainly strong similarities between the current conditions and those seen in the early 1990s; see Table 1. In particular, house prices are clearly overvalued. We estimate they are somewhere around 15% to 20% above fair value; the IMF suggest it could be as much as 30%. Similarly, as seen in the 90s, demand has dried up very quickly and mortgage approvals have fallen sharply.

7.89 However, there remain fundamental economic differences. The economy (relatively speaking) is in much better shape. For example, there are not the economic pressures of the Exchange Rate Mechanism (ERM), which caused spiralling interest rates. And, despite the current strong inflationary pressures, the RPI is unlikely to reach the 1990s peak of 11%. The labour market remains buoyant; employment figures in the three months to April 2008 were the highest on record. This could protect against forced sellers and prevent a downward spiral. However, the labour market is weakening with redundancies expected.

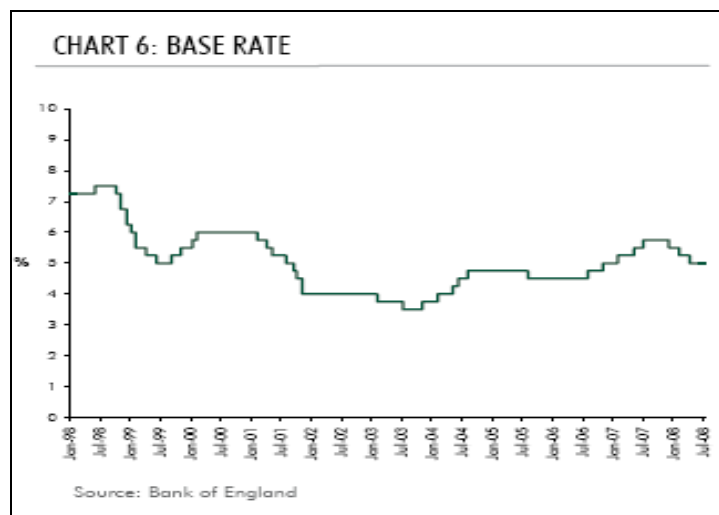
Figure 7.15 Real House Prices and GDP



7.90 All things considered house prices are likely to follow a similar trajectory to the early 90s, although the falls are unlikely to be as large and protracted as the 1990s as the economy is not as weak as it was at that time. The largest falls will be in this first year of the downturn; we expect house price falls of at least 10% in 2008. In the subsequent year there will be consistent and continual falls in house prices. However, these will be more modest. We would expect to see house price falls levelling off in 2010. Transactions are likely to fall to around 750,000 this year and remain at this level until the market picks up.

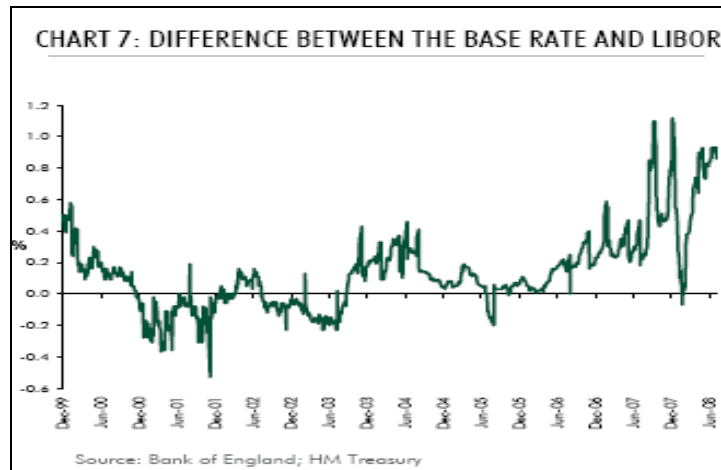
7.91 One of the worst manifestations of the 90s crash was negative equity and the extent of repossessions. In this downturn we are unlikely to experience these symptoms to such a degree. This is mainly because fewer home owners bought at the peak of the market, with only a relative few taking out high loan-to-value loans.

Figure 7.16 Base Rate



7.92 The number of repossessions has continued to worsen this quarter but not as dramatically as one might expect. The Essential Information Group reported that the number of lots offered at auction rose by only 3.6% in the period March-May compared with a year earlier. Most auctioneers believe that the bulk of this new stock are repossessed properties.

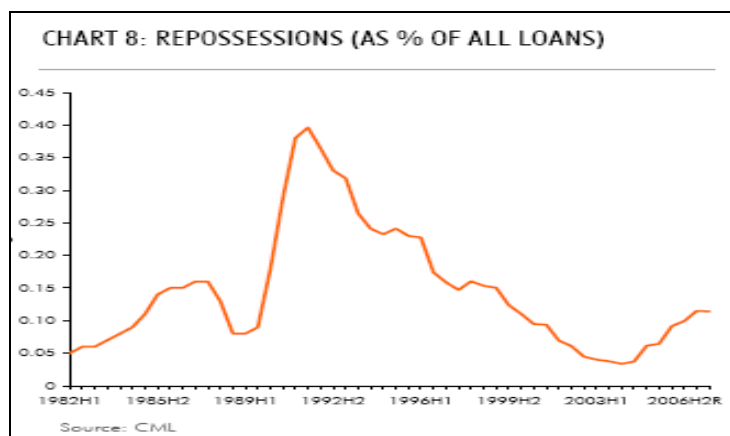
Figure 7.17 Difference Between the Base Rate and Libor



7.93 We would expect repossessions and forced sales to pick up in line with redundancies. There are increasing signs that redundancies are on the up. The unemployment rate is rising and reached 5.3% in the three months to April 2008 (from 5.2% in the previous three months) with the financial and construction industries being the worst hit. For example, there were over 4,200 redundancies in the construction industry in one week.

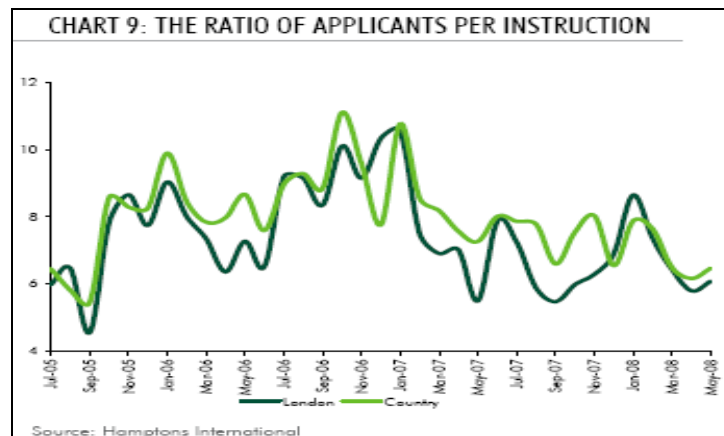
7.94 CBRE forecasts 24,000 job losses in central London in the FBS (financial & business services)) sector over 2008 and 2009. This is significant, but to put it into context over 48,000 jobs were lost in this sector in the two years after the dot com bubble burst. The CML are forecasting that there will be 45,000 repossessions in 2008, a 66% increase on 2007. However there has not yet been mass redundancies across the wider UK economy, which would be the likely trigger of an environment which would facilitate such a spike in repossessions as seen in the early 1990s (see Chart 8).

Figure 7.18 Repossessions



7.95 People will usually do all they can to cover their mortgage costs and prevent their property from being repossessed. Many develop coping strategies so that they do not have to lose their homes. This can include cutting back on overall spending, relying on credit cards and taking mortgage payment holidays. And of course some households will sell their homes to clear debts before repossession is necessary. The key to surviving the rising mortgage payments, is communication between the lenders and the borrowers. Treating Customers Fairly (part of FSA regime) compels lenders to repossess properties as a last resort. Arrangements can often be made to help borrowers ride the storm, such as only paying the interest or even a payment holiday.

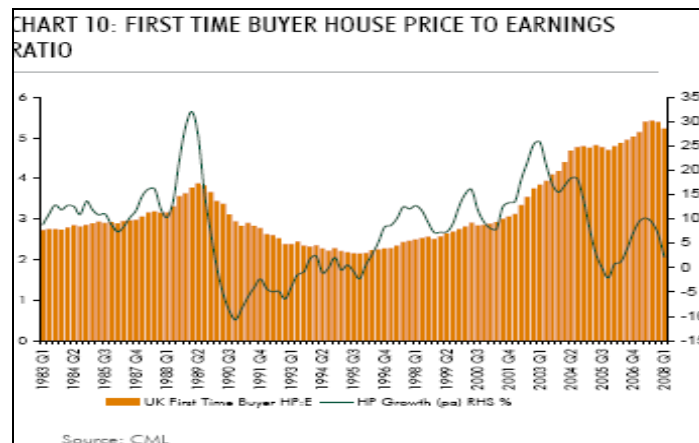
Figure 7.19 Ratio of Applicants per Instruction



7.96 Due to the problems of financing schemes and the risk associated with the end values, residential developers are increasingly reluctant to build. We are becoming even less optimistic about the number of starts this year. Anecdotal evidence suggests starts could be as low as 100,000 in 2008.

7.97 This is the lowest number of housing starts since 1980, 40% down on the number of starts in 2007. We do not expect to see a pick up until at least 2010. This affects both the private and affordable housing market and has serious implications for the government's annual target of 240,000 starts per annum.

Figure 7.20 First Time Buyer House Price to Earnings



7.98 Alongside the Government's house building targets, there are also a number of reasons why they would want to stabilise the housing market, not least the need to improve their re-election prospects.

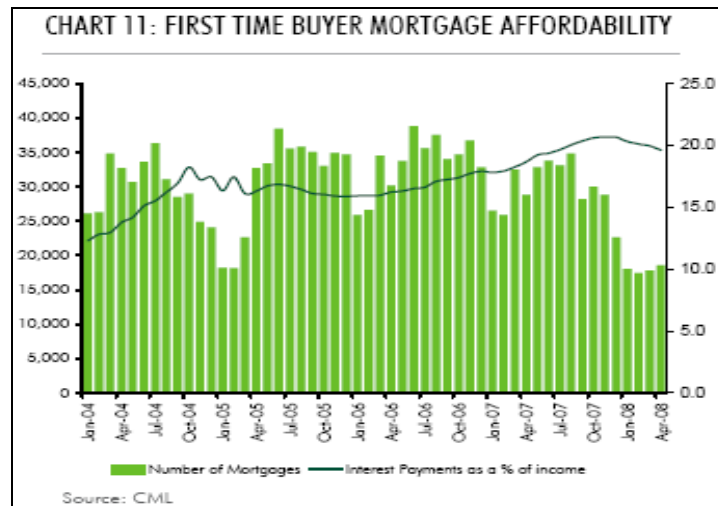
7.99 There are a number of options available to the Government to both stabilise the housing market and aid the economy. For example, a Stamp Duty holiday would lower the costs of buying a house and removing Home Information Packs could entice purchasers back into the market. In addition, the Government could lessen the implications of the downturn by protecting households against repossession. Several options have been mooted by the Government including a publicly funded 'rent-back' scheme, similar to the mortgage-to-rent scheme used in Scotland. This would involve a public body, such as a social landlord or a Housing Association, buying homes that are at risk of repossession and enabling the owner to continue living there as a tenant. However, this will raise a number of difficult questions that the Government will need to address, including the implications of the right-to-buy scheme going forward.

7.100 A simpler idea would be to reintroduce income support for mortgage interest payments for homeowners who are made redundant. Currently only those in rental accommodation qualify for housing benefit, which seems to contradict the Government's policy to encourage home ownership.

7.101 The Housing Minister's recent announcement of measures to support delivery of affordable housing through the credit crunch will provide a small degree support to house builders. These measures include providing funds to the Housing Corporation to buy up unsold stock from developers. However, house builders need far more help and we wait with anticipation to see what the full package of measures promised by the Government will include.

7.102 The rent-to-buy scheme has also been announced which aims to help first time buyers get on to the property ladder. The scheme allows households earning £60,000 or less to rent at 80% or less of the going rate for two or three years so that they can save up for a deposit. There are concerns that this measure does not go far enough and for the scheme to have any serious impact on the housing market it should be open to all first time buyers.

7.103 **Figure 7.21 First Time Mortgage Affordability**



7.104 Exactly when the market will bottom out is nearly impossible to accurately predict. But, there are various early warning signs to look out for. A clear sign will be a pick up in investment activity as funds with large amounts of equity look to capitalise on the falls in values. Many investors across the world are sitting on large amounts of equity, waiting for what they view as reasonably low prices. This form of “Vulture Company” is very common in the commercial market where the funds look to buy stock at the bottom of the market cycle. In the residential market these funds tend to look more towards buying up the development companies and their land banks.

7.105 It would be no surprise if land values lead the recovery in the housing market. Land values have led the falls in house prices and have arguably over corrected. Reports suggest that land values have fallen by as much as 30% over the last six months.

7.106 The lag between the buying of land and the completed end product will act as an advantage to developers. Therefore, as confidence returns to the market and risk decreases we would expect developers to reduce their margin requirements. As a result, we will see land values stabilising or even increasing.

Figure 7.22 Early 1990s versus Current Market Conditions

TABLE 1: EARLY 1990S VS CURRENT MARKET CONDITIONS

| Variable | Early 1990s | Current |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| General | | |
| Interest Rates | The BoE interest rate peaked in the 1990s at 14% as a result of entry into ERM. | Interest rates set by MPC; currently 5%. |
| Inflation | RPI – Peaked in 1990 at 10.9%. | RPI 4.6% in June 2008. Above target and expected to remain so. |
| UK GDP | The economy contracted and GDP fell by 1.4% in 1991. | GDP Q1 growth below trend at 0.4%. sharp slowdown expected, growth 1.5% in 2008 and 1.3% in 2009. |
| London GDP | GDP fell by -4.4% in the early 1980s (1980 and 1982) and -3.4% in 1991. | Slowdown in FBS to dampen London economy, London expected to under perform over at least the next 2 years. |
| Unemployment | Peaked at 10.4 % in 1993. | Recently rose to 5.3% and forecast to rise further. |
| House Prices | | |
| House Price Growth | Between 1989 and 1992 house prices fell by 18.5% across the UK and 31% in London. | House prices have fallen over recent months; annual growth is now negative at 6.3%. |
| Mortgage Approvals | Peaked in 1988 and fell by 65% over the following two years. | The interest rate rises of 2006/07 and the credit crunch resulted in approvals falling dramatically. May saw approvals fall by 64% yoy to 48,000. |
| Property Transactions | Peaked in 1988 and fell by 35% the following year. | The market is thinning but the peaks and troughs of the late 1980s and early 1990s are not as distinct. |
| Repossessions | Peaked in 1991 at 0.77% (as a % of all loans). | Risen recently but remain historically low. Reached 0.1% in 2007. |
| Equity Release | Not a large factor in the boom and subsequent crash in the 1980s but became more prevalent in the late 1990s. As house prices have increased rapidly over the last five years. This has been a major driver behind consumer spending. | Stabilisation and the threat of declining house prices have reduced the equity release market. Continued uncertainty in house prices and the more restricted mortgage lending with the removal of 100% mortgages and requirement for 25% to 50% equity for the most attractive interest rates will reduce this form of credit further. |
| Lending to Individuals | Unsecured lending reduced in the early 1990s as interest rates peaked and consumer confidence fell. | Lending criteria tightening for unsecured borrowing and credit cards. Lending growth reduced. Increasing interest rates despite BoE base rate cuts. |

Greater Manchester Residential Market Commentary

7.107 The heart of the Greater Manchester city-region's residential market has experienced a dramatic turnaround in recent years, with a multitude of regeneration and redevelopment schemes creating a resurgence in city and urban living. Such schemes take the form of either the conversion of existing former warehouse premises or the construction of modern new build schemes. This type of development has been prevalent across the area however; the current main focus is on the northern fringes such as Greenquarter, eastern fringes (New Islington) and The Quays.

7.108 In terms of supply within the Manchester City Region, at the end of 2007 approximately 8,276 units were under construction of which approximately 1,403 were located within the Manchester City Centre. In addition, another 16,941 units held Planning Permission towards the end of 2007, of which approximately 3,946 units were located within Manchester City Centre. However, the estimated current rate of completions at 2,698 units falls well short of the government's new annual target of 3,500 units.

7.109 Both Manchester City Council and Salford City Council is looking to expand the population within close proximity to the City Centres, by establishing schools and infrastructure etc. This is in line with national policy towards sustainable, higher density accommodation in City Centres, which reduces the reliance on cars as the main form of transport. In support of this trend in City living, Manchester and Salford's populations are set to increase significantly. Central Salford's vision is to create a further 1,500 new homes in the area. The relocation of BBC to Salford Quays creating at least 15,500 new jobs and boosting the regional economy will have a major effect on these numbers. In addition, Manchester and Salford retains many of its former students looking to continue to live in the area following University.

7.110 Salford Quays has developed a significant residential community in recent years and we understand it now benefits from approximately 7,000 residents. Examples of high quality residential development in The Quays either completed, under construction or in the pipeline include:

- NV Buildings (City Lofts) – three, 18-storey towers comprising approximately 240 apartments
- Manyoo (KW Linfoot) – four, 26 storey towers comprising 1,036 apartments
- Eerie Basin (Millennium Estates) – 194 apartments in a 21 storey and 10 storey development
- Broadway (Prospect) – 180 apartments
- Abito (AskLife) – 651 apartments in a 22 storey tower
- QX7 (Lowry Homes) – 268 apartments
- Media-City – 371 apartments within Phase 1

7.111 Land Registry data indicates that prices per apartment had increased by 73% since 2000. However price growth has slowed more recently with growth in 2005 and 2006 for apartments in Manchester of just 3% which is approximately half the UK average.

7.112 There are fears by many commentators that there is a demand and supply imbalance. Supply has undoubtedly increased as stated above, which has previously been offset by strong demand from graduates, young professionals, corporates and investors. The position has undoubtedly changed over the past few months following the sub-prime market

collapse in the USA which has led to the well publicised credit crunch in the UK which in turn has affected the availability of development finance.

7.113 Our investigations concerning current demand/ take up within Central areas confirm that demand from owner occupiers has declined considerably on the back of changes within the national residential market. Investors are still buying apartments within new schemes, although discounts are getting greater with deals generally being completed with discounts of between 25-35 %.

7.114 Today's economic fundamentals remain sound which will support the overall residential market and further interest rate falls are predicted which will assist buyer confidence. In order to increase demand for their product, developers are having to produce niche quality schemes to differentiate their product from the amount of stock due to be completed, for example Abito's 'crash pads' and West Development's Lumière and Skyline Central developments providing swimming pools, gym facilities and rental packages to increase the appeal of their schemes.

7.115 In terms of the future we would comment that City Centre residential markets are currently seeing a period of adjustment, with both developers and potential buyers waiting to see how the market unfolds. This is creating a period of market stagnation which is set to continue in the short term, until such time as there is an air of certainty regarding the strength of the wider economy and conversely the national residential property market.

7.116 Despite the present uncertainty regarding the residential market, there are a number of exciting residential developments in the pipeline in the Salford Quays of the City Region.

7.117 The BBC will move several of its departments including Children's, Sport, New Media, Five Live and Research between 2010-2012 to Peel Holdings' new Media City development. Media City will be the UK's first purpose built media based developments constructed on a 200 acre site in The Quays. This is set to be an internationally significant hub for media and creative industries. The BBC's move to the area will encourage other organisations to invest in the area and the influx of business and people to the area will create the demand for more residential stock within the area.

7.118 The BBC's decision to make Salford Quays its preferred location in the North West has led to an increase in demand for waterside homes. Investors and owner-occupiers have been turning their attention to the Quays in anticipation.

7.119 Architecture along the waterfront looks to reflect the cosmopolitan atmosphere that Media City hopes to secure. As a result a number of 'high-end' residential developments such as the NPV Buildings have been developed. Pipeline developments for the area are all offering high specification apartments in an attempt to create high profile residential

addresses to complement an area which hopes to become a premier business district. The current supply within the Salford area contains approximately 17,000 dwellings. Of these 98% are situated on previously developed land.

7.120 Neighbouring areas such as Trafford Park are certain to become beneficiaries of the 15,500 new people that will become employed in The Quays and as a result will become possible commuter locations. Howard Holdings decision to acquire the former Victorian warehouse site on Wharfside Way is testament to this. Set in a unique location between Salford Quays and Old Trafford, benefitting from the Manchester United football ground and Peel's media city scheme, this aspirational mixed-use scheme will - subject to planning - comprise circa 800 apartments, a 190-bed hotel and 70,000 sq ft of offices together with ancillary retail and car parking. This accommodation will be provided within two towers of 37 and 23 storeys. An additional phase comprising a further four towers is intended.

7.121 The development encapsulates the idea of contemporary living and looks to make the area a high profile residential and business address. Howard Holdings are looking to obtain planning permission for the project later this year and hope to begin the construction process during 2009.

Hotel and Leisure Market Commentary

7.122 Upon assessing the demand generators within the Greater Manchester hotel market it can be noted that previous market reports have suggested corporate related demand within the City's full service hotel market equates to over 33% of the total. The majority of this corporate business comes through conferencing, trade fair and general business. The conference market within the City is strong, and benefits from hosting internationally profile raising events, including the Labour Party Conference in 2006 and 2008.

7.123 The City of Manchester and its surrounding area has a strong base for attracting both corporate and commercial travellers. The current and future hotel facilities available are of an International standard and in the past few years this has assisted the City in hosting a number of revenue enhancing events. In 2002 Manchester held the Commonwealth games due to the outstanding sports facilities available and earlier in 2008 the City hosted the UEFA Cup final.

7.124 The local hotel market consistently benefits from a strong football related demand during match days. The international success of Manchester United, arguably the world's most profitable and popular club intrinsically increases the media, management and sponsor representation as well as the domestic accommodation needs.

Greater Manchester Hotel Performance

7.125 Greater Manchester has undergone huge regeneration over the last ten years and major real estate and infrastructure developments have transformed the City Region. On the

back of this ongoing regeneration, the hotel market has performed very strongly, particularly since the mid to late 90's. This is remarkable in view of the fact that some 2,000 new bedrooms have come on stream over the last six years, underpinning its economic strength and ability to constantly re-invent itself.

7.126 Hotel brands present include Marriot, Q Hotels, Hilton, Accor, Malmaison, RF Hotels, Jarvis and The Lowry. Looking at 19 hotels operating in the immediate area, the main supply is of 3* and 4* hotels having 6 at each standard. Until recently the region had an immature hotel market, and the five stars sector remains the least represented with two hotels, namely the Radisson Edwardian and the Lowry Hotel providing only 11.6% of the supply.

Table 7.2 - Manchester Hotels

| Rating | Number of hotels | Average Rack Rate* | Number of Rooms | Percentage of Supply |
|--------|------------------|--------------------|-----------------|----------------------|
| 5 star | 2 | £207.50 | 427 | 11.6% |
| 4 star | 6 | £172.67 | 1389 | 37.6% |
| 3 star | 6 | £116 | 1138 | 30.8% |
| LS | 5 | £66.60 | 742 | 20.0% |
| Total | 19 | £129.74 | 3694 | 100% |

Source: RGA Research

*single occupancy

Key Performance Indicators

7.127 To illustrate buoyancy of the hotel market, the table which follows highlights the annual key performance indicators from 2003 to 2007 year end. The market has consistently encountered 5 years of stable growth from both a RevPAR and a rate perspective.

Table 7.3 - Annual Key Performance Indicators 2003-2007

| | 2003 | 2004 | 2005 | 2006 | 2007 |
|-----------|--------|--------|--------|--------|--------|
| Occupancy | 71.4% | 74.1% | 75.3% | 75.8% | 74.4% |
| ADR | £62.16 | £64.96 | £68.69 | £71.47 | £73.96 |
| RevPar | £44.38 | £48.13 | £51.74 | £54.14 | £55.00 |

Source: STR Global

YTD April Comparison 2007 vs 2008

7.128 There have been a number of new openings in the market and the demand generators to help support these new developments are beginning to come on stream through 2008 and 2009 with plans for a complete inner-city rejuvenation. On consideration of

the trading statistics for the month of April this year it is clear that growth is set to continue at a steady pace:-

Table 7.4 - YTD April Comparison 2007 vs 2008

| | ADR | RevPar | Occupancy |
|------------|--------|--------|-----------|
| YTD Apr 07 | £73.75 | £53.76 | 72.9% |
| YTD Apr 08 | £75.20 | £54.30 | 72.1% |

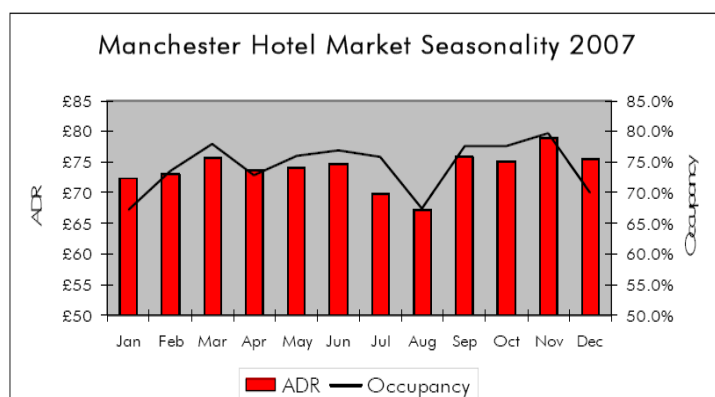
Source: STR Global

Seasonality

7.129 The seasonality of demand within the Greater Manchester hotel market reflects a well balanced profile. Demand is at its strongest between the months of September and November with a secondary peak also occurring between March and June. This reflects the corporate demand within the market, with the secondary peak in April and June reflecting additional tourist interest over the spring and summer breaks.

7.130 The months of July and August however show a small drop in the market that appears to coincide with school holidays. This implies that most residents and corporate travellers that visit throughout other parts of the year have chosen to go abroad. With the cities improved profile and increasing tourism profile this can be expected to improve in the future. The strong demand overall from September to May reflects the timing of the Premier League season which drives demand in the local market due to the presence of both Manchester United and Manchester City football clubs and the business that their international profile creates.

Figure 7.23 Manchester Hotel Market 2007



Source: Deloitte Hotel Benchmark Statistics

Future Demand Generators

7.131 The recent completion and continued expansion of a number of development programmes within the Manchester City region including Salford stadium, Chill Factor (a giant indoor ski slope and alternative sports centre), Spinningfields (the inner-city regeneration of a number of high end retail outlets, restaurants and office headquarters), Media City:UK (the first media city in the UK and a centre of excellence for a number of Universities) and the Beetham Tower will all drive demand growth throughout the Greater Manchester market.

7.132 The consistent rejuvenation of the area will also raise its profile and ensure accelerated economic growth in most sectors.

7.133 This profile continues to be enhanced giving the area the increasing ability to secure national and international events. Late 2008 will see the City host four more major events, more than any other City this year:-

- UCI Track Cycling World Championship
- FINA World Swimming Championship
- British Tae-kwon Do Championships
- Hi – Tec World Squash Championship

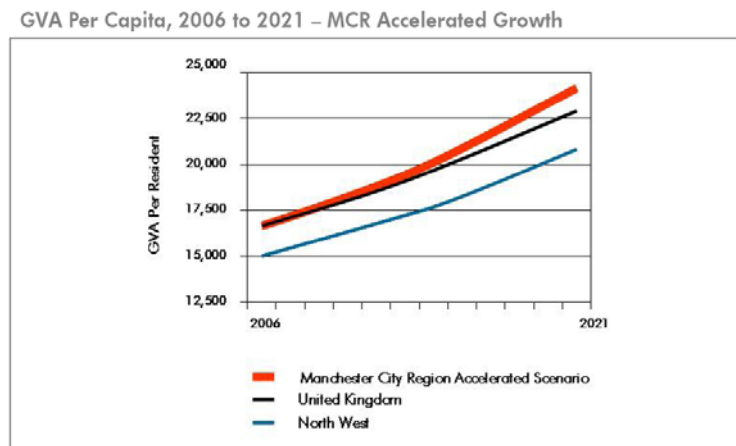
7.134 Although on a world front Greater Manchester is seen as a unique and prosperous venue, the area continues to promote and increase a lot of local and regional events including:

- BUPA Great Manchester Run
- Manchester International Film Festival
- Manchester International Festival (of Arts and Culture)

Recent and Proposed Developments

7.135 The Manchester City region is currently undergoing a great deal of change with a number of key developments ongoing and recently completed. In 2006 the government office for the North West along with other joint parties created the Manchester Development Programme. It aims to see the city become a world class region with accelerated economic growth. The plan hopes that by 2025 Manchester will be able to rival the attractive and diverse City of London enabling an increase in employment, prosperity and hotel demand throughout the area. It plans development and rejuvenation over a 15 year period, the aim of which is outlined in the graph overleaf::

Figure 7.24 GVA Per Capita - Forecast Accelerated growth Rate for Manchester



Source: The MCR Development Programme 2006

Hotel Supply

7.136 The existing supply includes a number of international brands, reflecting the areas position as a strong regional UK centre, including The Hilton Deansgate, Marriott, Radisson, Malmaison, Holiday Inn and Novotel.

7.137 The market has recently seen the introduction of a number of new hotel developments and refurbishments. In the Piccadilly area a new 338 bedroom MacDonald hotel has recently been completed whilst the 285 bedroom city in is lined to the railway station via a pedestrian bridge.

7.138 Specifically with regard to Trafford Park, the current hotel supply includes:

- Copthorne
- Etap
- Holiday Inn Express
- Golden Tulip
- Premier Inn
- Travelodge
- Old Trafford Lodge

7.139 In addition to the existing supply, there have been a number of high profile openings during 2007/2008 including:-

- City Inn - Opened in May 2007, 285-bed hotel at Piccadilly Place. Hotel includes 7 suites, 12 meeting and event spaces, a lounge bar and 120-cover City Café with bar and alfresco terrace.

- MacDonald Hotel - The MacDonald Hotel which opened October 2007 is a £48 million development of a 338 bedroom hotel opposite Manchester Piccadilly train station. It has extensive leisure facilities including thermal spa and gym. There are 13 meeting rooms as well as a main function suite will hold 250 covers. The rooms are all spacious.
- Abode (Rossetti) - The Abode is a 4* hotel in a Grade II listed building with original features. It is situated close to Piccadilly train station and opened in March 2008. It has 61 rooms, including five suites. Other facilities include Michael Caine's Restaurant, MC Café bar, Champagne and Cocktail bar.
- Yang Sing Oriental - 36 Princess Street is currently being converted into a 4/5* 48 bed boutique hotel with ancillary leisure facilities. It will be themed on 1920s Shanghai opulence and is due to open July 2008.

Pipeline supply

7.140 There are several further hotel schemes under construction including:-

- Crowne Plaza - The new Crowne Plaza, due to open 1 September 2008, is located in the Northern Quarter. It will have 228 bedrooms, 9 meetings room, and 24 hour gym.
- Origin - The new Origin mixed use development on the corner of Whitworth Street/Princess Street will comprise 180 apartments, 62,000 square feet of offices and 210-bed hotel. Currently under construction. It is rumoured that the hotel will be operated by Starwood under their 'W' brand.
- Ramada - The £18 million refurbishment of the hotel that is located directly opposite the Thistle is due to complete this month which brings the hotel up to date to compete with the 3* hotels in the city.

7.141 In addition, Planning consent has been granted for the following sites:-

- Park Inn - A hotel by Rezidor, located in the Green Quarter. Construction has not commenced yet, expected completion mid 2010. It will contain 252 bedrooms, leisure facilities including swimming pool, spa and gym, also 5 meeting rooms.
- 122-124 Great Ancoats Street - New 145 room hotel with ground floor retail uses, opposite the Central Retail Park.
- 2-4 Oxford Street - Application for 13 storeys, 214 bed Holiday Inn Express on this site at the junction of Oxford Road and Hulme Street.
- 1 Water Street - MCR Property Group is planning to redevelop the former Harry Ramsden site. The scheme envisages a mixed use scheme with 946 square metres retail or office, 3692 square metres of offices, 126 apart-hotel service apartments, residential units and a gym.

- Wyre Street/Fairfields Street - New hotel providing 91 beds and 6 meeting rooms adjacent to Piccadilly Station.
- 11 Bloom Street - Conversion of 11 Bloom Street into a casino with the conversion of the upper floors into a hotel. Nine large suites are proposed.
- 26-30 Oldham Street - Conversion of four floors above the Dry Bar on Oldham Street into a budget hotel. Based on dormitory system, the hostel would cater for up to 248 guests.
- Ducie Street/Store Street - The Piccadilly tower is a mixed use scheme including 220 bed hotel, fitness and conference facilities, 430 apartments, retail space, multi storey car park, some retail and bridge to Piccadilly Station.

7.142 Future potential hotel developments without planning include:-

- First Street - ASK developments are planning a hotel as part of its office led First Street development. No masterplan or planning has been accepted yet.
- Whitworth Street West (confidential) - A private equity backed hotel operator is planning to build an upper 3* hotel with 264 beds near the Jurys Inn. There is currently no planning permission for the scheme on the site, although the purchasers are confidential with a planned opening for 2010.
- Church Street - Barcelo, a Spanish brand, has shown interest in operating the proposed Peel Holdings/MCC joint venture on Church Street.
- Riverside West - Bruntwood are currently searching for operators for their site in Salford, near The Lowry hotel. It is likely that it will be a 4* or 5* hotel with between 200 and 250 rooms. There is currently no planning.
- Princess on Portland - The 3* Princess on Portland located on the same side of Portland Street to the Thistle. It has been recently acquired by Harcourt with Folio as the operators. There is a proposal to extensively refurbish, repositioning itself in the 4* market.
- Ramada/Renaissance - West Properties have bought the Ramada/Renaissance hotel located on Blackfriars Street with plans to redevelop the site into a mixed use scheme consisting of residential, commercial and a luxury hotel. Marriott operate the hotel under a lease with a number of years unexpired.
- Media-City - We understand that Peel have plans for a further two hotels as part of the 200-acre development.

Leisure

7.143 There are a number of leisure facilities and attractions in and around Trafford Park. Most notably, the Trafford Centre is the main shopping location in the area, has the largest and most populous catchment area in relation to any other regional shopping centre. The

Trafford Centre at present already attracts 30 million visitors annually. It comprises approximately 1.24 million sq ft and includes 230 stores.

7.144 The Trafford Centre also incorporates a large element of leisure, including an Odeon Cinema Complex and 'The Orient.' The Orient is the centres dining and leisure area and is the largest of its kind in Europe. The Great Hall was another leisure and dining addition to the centre in 2007 and is home to restaurant chains such as Carluccio's, Pesto, Las Iguanas, Costa & Brasserie Palmes D'or.

7.145 The Lowry Centre and Lowry Designer Outlet Centre opened in April 2000 and provides two theatres, approximately 80 stores and a cinema. In addition the Digital World Centre forms part of the development which comprises office accommodation.

7.146 Elsewhere within the Park there is a limited supply of restaurants, with just a Harry Ramsdens and KFC Restaurant just off Chester Road close to the entrance to the Park opposite White City retail park. There are a number of restaurants within the Quays, in close proximity to Trafford Park including Pizza Express, Arbuckles, TGI Friday etc. Trafford Park has the ability to improve the restaurant supply within the locality and provide another alternative to what is currently a limited restaurant supply which mainly comprises medium budget restaurant outlets.

7.147 The leisure industry is continually expanding with the recent Chill Factor development. Chill Factor is a 250,000 sq ft scheme which comprises a £31m indoor ski centre, retail and restaurant units. The development opened in November 2007 and includes the UK's longest indoor real snow ski slope at 180m long and 100m wide.

7.148 Other key leisure facilities include the JJB Soccerdome, the David Lloyd Health and Fitness Centre and Playgolf. Playgolf is state of the art golf driving range providing 64 driving bays, professional tuition and putting green. The JJB Soccerdome, is a state of the art indoor soccer venue catering for people of all ages and abilities. As well as catering for football, the dome hosts leagues and competitions, offers party rooms and has a JJB sports store.

7.149 The David Lloyd Health and Fitness centre offers high quality facilities and is situated on the Barton Embankment in Trafford Park. David Lloyd has 8 luxury indoor and 4 outdoor tennis courts, 4 anti-slip badminton courts, 3 championship squash courts and 4 indoor and outdoor heated pools, an extensive gymnasium, 3 studios and sauna, steam room and spa. The centre offers facilities for all ages and abilities and caters for families.

Summary

7.150 Trafford Park is facing a future of positive transition based upon regeneration of existing areas to higher quality accommodation, and the complete transformation of certain key peripheral areas that may be regarded as 'Gateways' to the Park. These areas will

experience the transition from industrial usage to that of higher value mixed-use developments focused around office, retail / leisure and residential.

7.151 We have identified the key drivers within the Park to be:-

- the strategic location of the Park to Manchester City Centre and the expansive motorway network.
- the development of The Trafford Centre and Peel's Leisure rectangle; this development has seen the area changing into a retail and leisure hub with complementing commercial units. With the aspiration to develop residential in this area the alteration of this aspect of the Park will be considerable.
- Wharfside at the eastern gateway of the Park will experience change to the current built environment based on the fact that the area driven by Media City will see the growth of higher quality office and mixed used developments in the area even including residential which has been lost from the Park for a number of years.

Economic Climate and the effect upon the Property market

7.152 As has been presented within the report, the economic crisis has effected both the financial and property markets and as a result the property market has seen a considerable slow down since the middle of 2007; a trend that we predict will run well into 2010. Due to the impact that this 'credit crisis' has had on the financial and particular banking sectors we have experienced:-

- a considerable reduction in property values
- far more stringent lending policies, resulting in a huge decline in transactions
- expensive development finance which ultimately has led to the 'moth-balling' of numerous developments

Industrial

7.153 Trafford Park is an extremely well-established industrial estate that, given its age, had a predominance of older industrial accommodation which is less attractive, interspersed with newer accommodation which is better suited to modern-day occupier expectations and demands. In recent years the structure of occupiers has shifted away from manufacturing to more light industrial, with larger distribution firms preferring alternative locations; however the latter trend has been challenged over the past 12 months with four large distribution deals having taken place.

7.154 With the changing make-up of the Park differing market products are starting to emerge. There has been a revitalisation of many of the older estates either through considerable investment or the redevelopment - for example Brixton's Premier Park. This is partly-driven by the fact that there are a limited number of 'oven-ready' development sites, leading to the continued redevelopment of older properties that are reaching the end of their economic lives, although the present economic climate is likely to see such activity - which can be relatively marginal and is risky - slow down and not pick up again until there is a greater level of economic stability.

Office

7.155 Offices located within the Park have also traditionally been a lower quality offering. However between 2006 -2007, during the low interest rate climate and buoyant market, the increasing demand from owner-occupiers and smaller investors for self-contained offices was met by the development of smaller pavilion-style office buildings on available sites close to the city centre, such as the schemes developed by Marshalls (Cobra Court). This scheme typically offered 10,000 sq ft units that could be sub-divided into smaller suites of 2,500 to 5,000 sq ft. This style of product will continue to succeed within the Park; however, within the current economic climate it is highly unlikely that developers will speculatively build such schemes as a result of rising interest rates, lack of available finance, increasing build costs and nervousness amongst many potential occupiers.

7.156 Having said this there have been larger schemes which have seen some very notable successes such as Peel's Venus Point. Many local market commentators see this style of larger higher-quality office accommodation as the next transition within Trafford Park's office market cycle, with further development of similar accommodation likely in and around the Peel rectangle and Wharfside areas.

Residential

7.157 Whilst there is currently no residential offering within Trafford Park itself, there has been a steady increase over recent years in the number of different residential developments on offer within the Manchester city centre and its fringe, with the resurgence in city living. Particular reference has been given to a number of residential schemes located in close proximity of Trafford Park in Salford and around the Quays. It is expected that residential accommodation will begin to appear within the peripheral areas of Trafford Park, in particular the areas that bound Peel's rectangle and Wharfside, developed on the back of the leisure and retail offering of the Trafford Centre and the mixed-use urban life style that will be driven by the development of Media City, and there are a number of exciting residential developments in the pipeline. However the current credit crisis may stifle large numbers of this type of development from happening in the immediate future and with continued city

centre residential price decline it may be some time before developers again begin to speculatively build residential accommodation, particularly in unproven areas.

7.158 In the longer term both Manchester City Council and Salford City Council are looking to expand the population within close proximity to the City Centres, by establishing schools and infrastructure etc. The relocation of BBC to Media City at Salford Quays will bring with it the creation of the UK's first purpose-built media-based development constructed on a 200 acre site. This is set to be an internationally significant hub for media and creative industries, creating at least 15,500 new jobs and boosting the regional economy. Central Salford URC's vision is to create a further 1,500 new homes in the area off the back of Mediacity and the expectation that the area will become a viable destination for both professional and family-living. Neighbouring areas such as Trafford Park are certain to become beneficiaries of the 15,500 new people that will become employed in The Quays and as a result will become possible commuter locations. Howard Holdings are hoping to capitalise upon this with the development of their Stratum scheme which will offer an aspirational mixed-use scheme to the market at the eastern entrance to Trafford Park; subject to planning. It will comprise circa 800 apartments, a 190 bed hotel and 70,000 sq ft of offices together with ancillary retail and car parking within two towers of 37 and 23 storeys. An additional phase comprising a further four towers is intended.

Hotel

7.159 There has been, and continues to be, considerable demand from hotel operators to locate in Manchester and the surrounding areas. Trafford Park is viewed as a key location by operators due to the relationships that can be created between Mediacity, the Trafford Centre and Manchester United and how they can trade off these key tourist / commercial attractions moving forward. In addition Mediacity will offer a global business destination with delegates and employees commuting from within the UK and internationally; Manchester United has forty home games per season and an even more prevalent conferencing facility. The Trafford Centre will continue to be one of the regions main tourist attractions visited by shoppers from a wide geographic area who travel to the Centre for a weekend experience, many of whom will continue to require hotel accommodation.

8 Trafford Park Business Skills

Introduction

8.1 This section covers the skill demographics of the workforce employed within Trafford Park. The study area for this has been defined as Trafford, Manchester and Salford districts as these areas provide the majority of Trafford Park employees. Areas covered include:

- Skills Priorities
- Core Labour Area Definition and Analysis
- Historical and Projected Population Analysis
- Assessment of Current Skill Levels and
- Occupation Analysis
- Skill Trends and Demand by Sector
- Deprivation and Economic Inactivity
- Key Stakeholder Consultations

8.2 These areas support the report in providing an understanding of the baseline position of the Trafford Park work force. Sources used include the 2001 Census, Index of Multiple Deprivation 2004/07, Mid Year Population Estimates 2006, Sub-national Population Projections 2004, Annual Population Survey 1999 - 2007, Local Area Force Survey, Greater Manchester Skills Priorities Report March 2006 and the Greater Manchester Futures Model 2007.

Trafford Skills Priorities

The Learning and Skills Council Baseline Report for Trafford

8.3 The LSC Greater Manchester's recent baseline report for Trafford analyses the current supply and demand for skills in the Trafford economy and highlights a number of key learning and skills issues for the borough which must be addressed in order to increase the economic competitiveness of Trafford and take advantage of potential growth sectors in the region. The key positive elements of the report are as follows:

- Trafford has a high proportion of higher skilled residents (Level 3 and above) and a lower proportion with no qualifications;
- The occupational profile of Trafford is weighted towards higher skilled occupations;
- Trafford has low unemployment and economic inactivity rates;
- There has been employment growth in Trafford, in particular within the ICT Digital / Communications Sector, Creative/Digital. New Media Sector and retail;

- Trafford has high levels of GVA growth and enterprise;
- Future economic growth forecasts are strong;
- NEET figure in Trafford are lower than elsewhere in the sub-region; and
- High success rates in FE.

8.4 Despite the above, very positive profile, there are some skills issues to be addressed in the Borough, namely:-

- Trafford has relatively low levels of apprenticeships;
- The increase in FE success rates for 16-18 year olds is below the GM average;
- The high proportions of people with a learning difficulty / disability and with lower level qualifications;
- There has been a reduction in the participation of individuals aged 19+ at level 2;
- There is a need to maintain the high level of achievement at NVQ Level 2 and 3; and
- There is a need to Increase the representation of Trafford Park residents in specific Train to Gain sector Subject Areas;

8.5 In relation to other areas in Greater Manchester, Trafford generally has a well qualified workforce. However it will be important through the Trafford Park Masterplan, in particular via the business survey, to identify specific skills shortages and issues for employers on the Park and to make recommendations which fit within the learning and skills policy priorities.

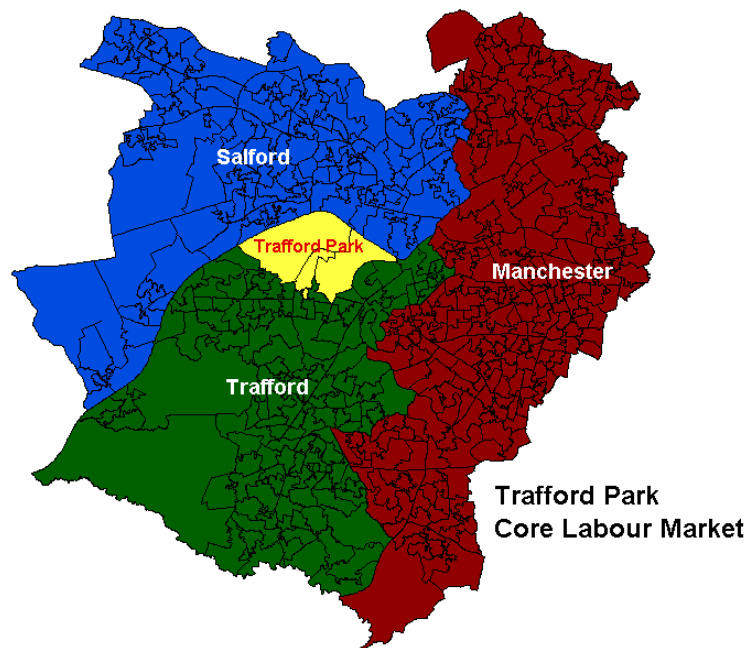
The Trafford Park Core Labour Market

8.6 Trafford Park, as an industrial estate, does not provide sufficient housing capacity for the workforce required and the majority of employees commute into Trafford Park on a daily basis. In Chapter 6 the primary methods of commuting were discussed and the maps used also highlighted the main areas from which people were commuting. The core areas are Trafford, Salford and to a lesser degree, Manchester. These districts can be described as “Trafford Park Core Labour Market” which accounts for over 60% of the workforce.

8.7 Although a large proportion of Manchester is closer to Trafford Park than parts of Trafford and Salford, the number of commuters who from live in the north and east of Manchester who travel west into Trafford Park for work is not large. This can be explained by east Manchester's historic role as an industrial core in its own right in the 40s and 50s, with employment available locally for residents. The decline in industrial employment within east Manchester was accompanied by a decline in population (of over 10,000) many of whom were skilled workers. East Manchester now has a population of less than 70,000 and many work in the City Centre. The qualifications and skills levels of residents in East Manchester

are below the regional and sub regional averages, limiting the ability of local people to access many of the employment opportunities in the Park. The remainder of the region still makes up a significant proportion of the workers in Trafford Park.

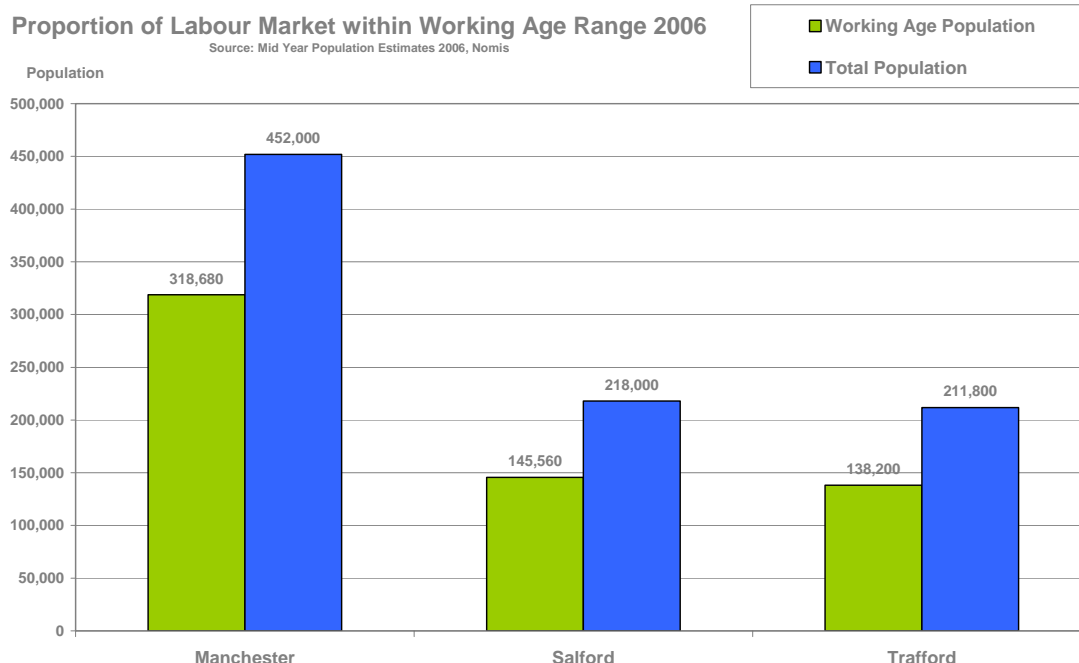
Figure 8.1 Trafford Park Core Labour Market



Size of the Core Labour Market

8.8 The total population comprised in Manchester, Trafford and Salford is 1,162,400 with 68% of in the working age group of 16-65 years old. Trafford and Salford's working age groups make up 65% and 67% of their total population respectively. Manchester has a higher percentage of its population within the working age group (71%) but, as the next table demonstrates, a smaller percentage of these residents commute to work within Trafford Park itself.

Figure 8.2



Trafford Park's Work Force

8.9 Based on the below table, 63% of Trafford Park's workforce (circa 30,000) commutes from the identified Core Labour Market Area. This means that approximately 3,600 residents commute from Manchester, 7,080 from Salford and 8,130 commute within Trafford. These areas comprise the core work force for Trafford Park. Even though Stockport, Bolton and Wigan provide approximately 15% of the remainder of the work force, they do not form part of the core labour market as defined for this report.

Table 8.1 - Origins of Commuter Journeys

| Origins of Commuter Journeys (Source: 2001 Census) | |
|---------------------------------------------------------------------|---------------------------------------|
| Origin | % of Trafford Park Workforce Provided |
| Manchester | 12.0% |
| Salford | 23.6% |
| Trafford | 27.1% |
| Stockport | 5.9% |
| Bolton | 5.2% |
| Wigan | 5.0% |
| Tameside | 4.1% |
| Other Areas | 17.1% |

Population Profile Age

8.10 Figure 8.3 details the breakdown of the working age population in the districts making up the Core Labour Market Area, compared with the North West region and England & Wales. It illustrates that the North West has a working age profile which matches the national profile almost identically; the largest disparity between the demographics is less than 0.5%. Of the Core Labour market areas Trafford and Salford share similar age structures, which differ by 3.59% at the most from the national profile.

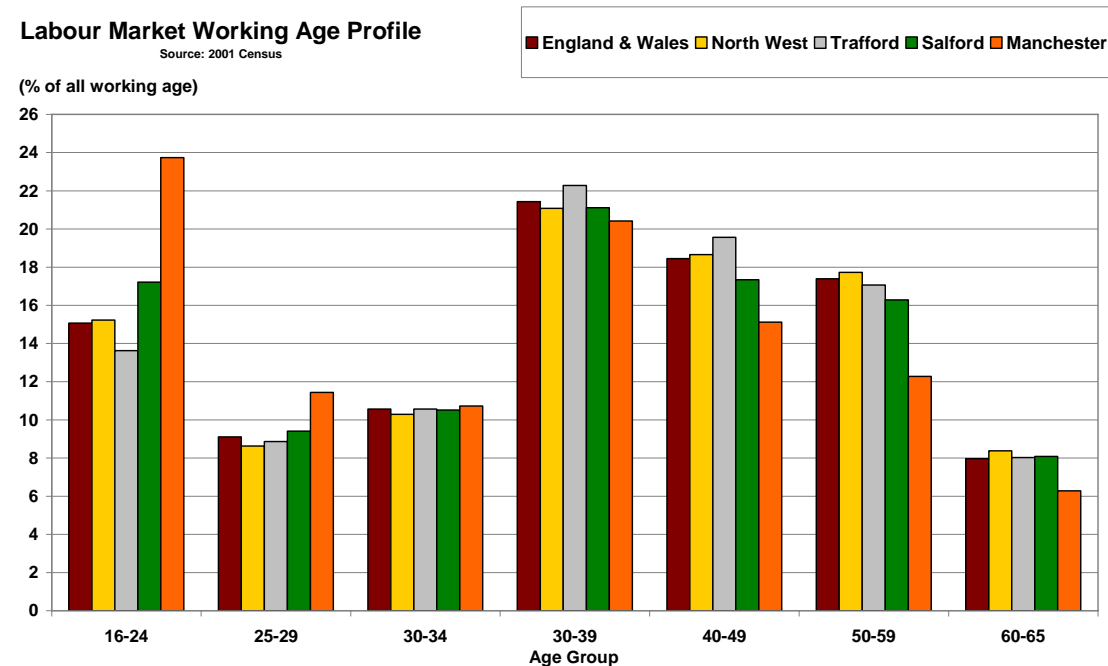
8.11 In comparison, Manchester demonstrates quite a different age structure, only following the pattern of the other areas between the 30-39 year old age groups. A significant factor in the Manchester demographics is the higher proportion of 16-24 year-olds (23.7%), compared to the national average of 15.5%: this can largely be explained by the large student population attracted by the city's Higher Education Institutions (HEIs). This factor is also evident in the Salford profile - which also has a number of HEIs - where the proportion of 16-24 year-olds stands at 17.2%, albeit to a lesser degree than in Manchester.

8.12 As set out above Manchester and, to a lesser extent, Salford have a much higher population falling in the 16-24 year-old age group than the regional and national averages. By comparison Trafford has a smaller proportion of 16-24 year-olds with 13.6%. This pattern of a relatively young population continues into the 25-29 age group, which represents 11.4% of Manchester's working age population, whereas all other areas and regions have a proportion which lies between 8.5% and 9.5%.

8.13 All areas have between 10% and 11% within the 30-34 years old age group and the similarity continues into the 30-39 years old age group where there is less than 2% variation; after this point the age structures deviate from one another. Trafford has the highest proportion of residents aged between 40-49 years old (19.6%), which is above the national average of 18.45%, whereas Manchester has the lowest (15.1%).

8.14 Trafford overall has a high proportion of its workforce in the 30-49 year-old age, although it has access to a younger workforce through its proximity to Manchester.

Figure 8.3



Population Change

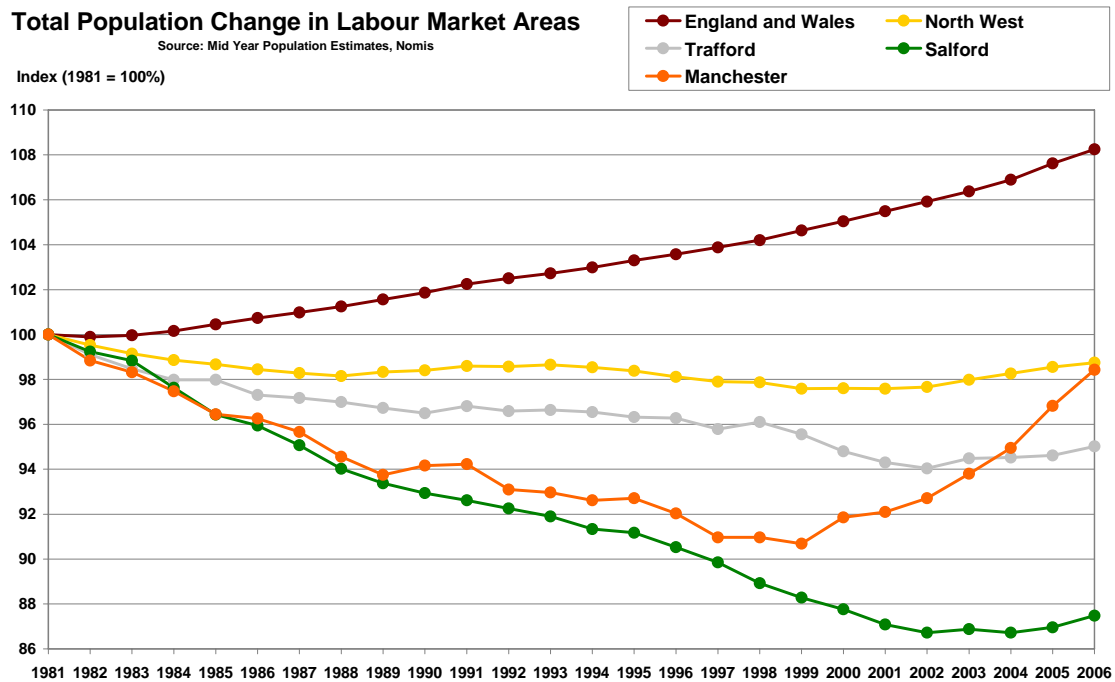
8.15 In 1981 the total population for England & Wales was 49,634,300. Between 1981 and 2006 this figure has risen to 53,728,800 an increase of approximately 8.2%. As the chart below illustrates this increase was both gradual and consistent. Within this time period the north of England has experienced a modest decline, although since 2002 a new upward trend has been established.

8.16 Salford experienced the most dramatic decrease, with the population falling 13.3% between 1981 and 2002. The historic trend of people leaving the urban core continued in Salford until 2002, although the slight population increase of 0.8% by 2006 suggests that the area is only slowly recovering.

8.17 Manchester saw a similar proportional decline in population as Salford up until 1999, although since then the population has increased by 8%, a rapid increase in a short time. In spite of this sharp increase the 2006 population figure is well below the 1981 figure of 459,200, and several hundred thousand short of its historic peak. The surge in population growth since 1999 has been due to the growth in employment and the establishment of an urban living housing market, much of which has been the focus of Manchester's regeneration activities.

8.18 Trafford experienced a decline that was proportionally larger than the North West, and has experienced a population growth since 2002, in line with the region.

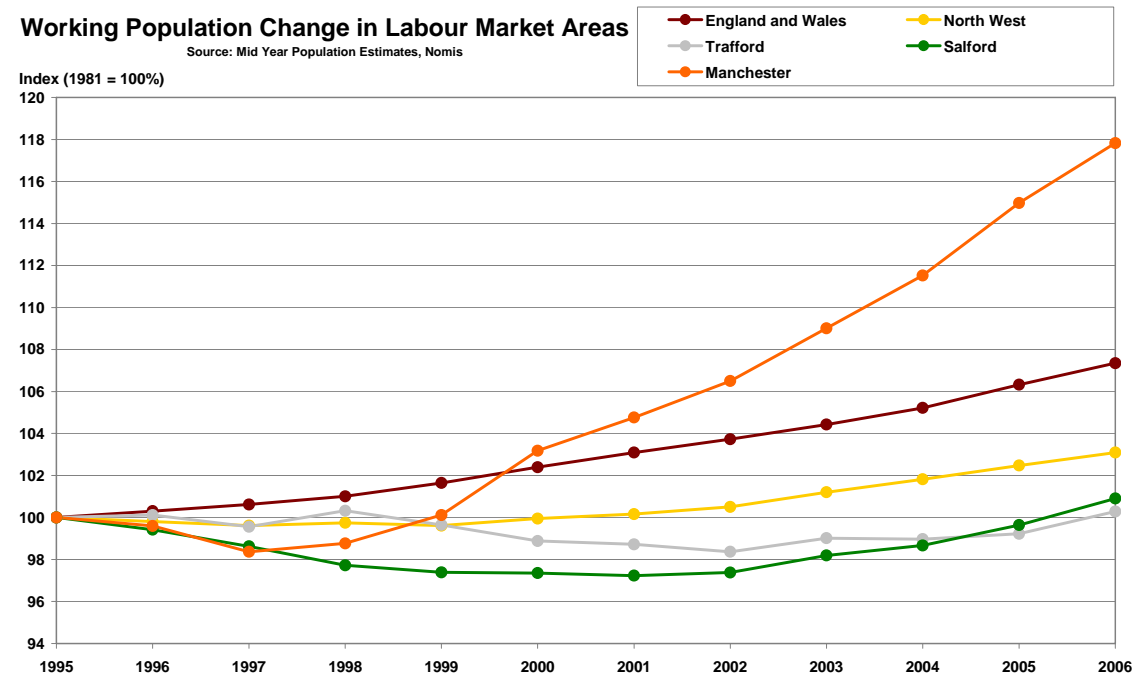
Figure 8.4



Working Age Population Change

8.19 The changes in the working age population of 16-65 years between 1995 and 2006 are illustrated below. The North West, Trafford and Salford all share similar working age population pattern as the total population; initial decrease in the late 1990s followed by gradual but consistent increase. Conversely, Manchester's working age population increased by 18% from its 1995 population of 270,460. This increase in working age population is probably due to the rapid increase in employment in the City over this time period.

Figure 8.5

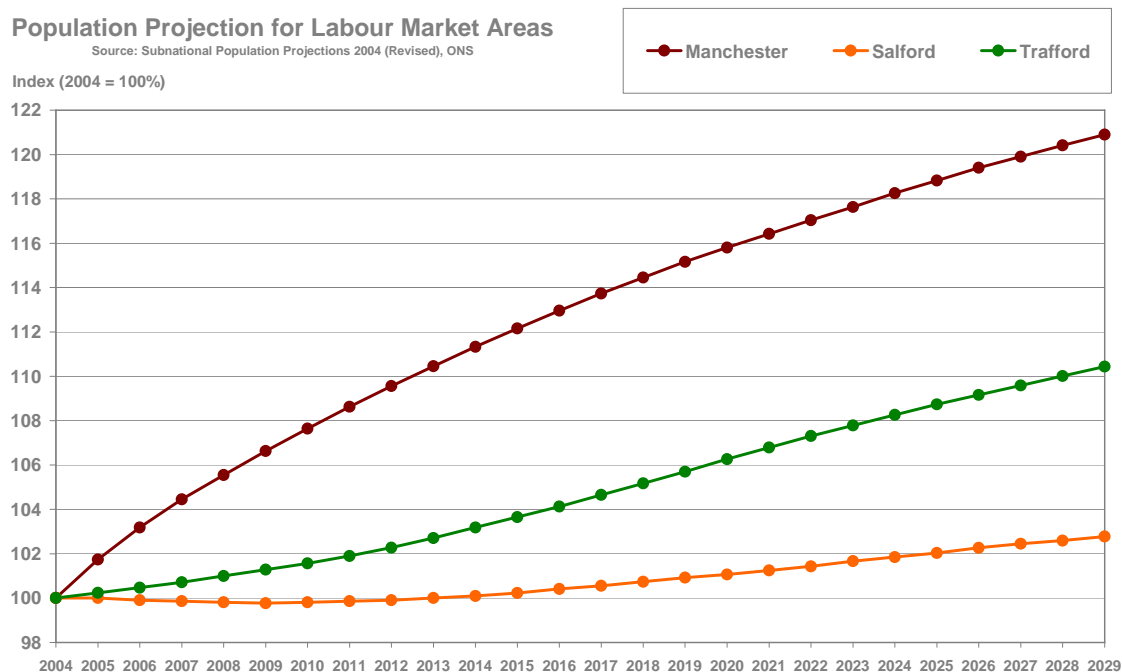


Population Forecasts

8.20 These statistics are trend based projections, which indicates that assumptions for future levels of births, deaths and migration are based on observed levels over the previous five years.

8.21 If current trends continue, Manchester's population is expected to increase by over 20% (an increase to 527,100 residents by 2029) in the next 25 years. This is a very high level of growth and is based on migration, particularly international economic migration. In contrast for Salford at 2.8% (an increase to 222,100 residents by 2029) is modest, although it continues the upward trend after several decades of population decline. The projected forecast for Trafford at 10.4% (an increase to 232,700 residents by 2029), although lower than that of Manchester, is higher than that of Salford and Greater Manchester (8.9%).

Figure 8.6



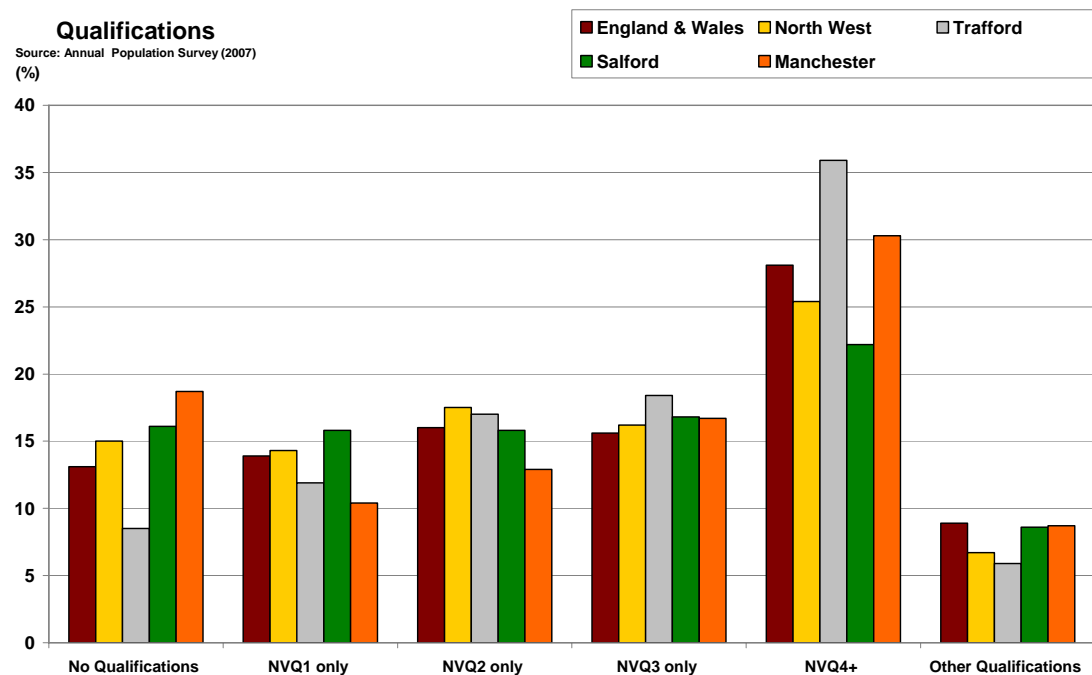
Assessment of Current Skills Levels

Skills of the current workforce

8.22 The chart below emphasises the advanced standard of higher level educational attainment in Trafford than in either Manchester or Salford. Trafford has the lowest level of residents with no qualifications (8.5%), which is also lower than both the regional average (15%) and the national average (13.1%). Manchester and Salford both have higher proportions of working age residents with no qualifications than the regional and national average. Manchester has the lowest number of Level 1 and 2 qualifications at 10.4% and 12.9% respectively.

8.23 Trafford, Salford and Manchester each have Level 3 qualification standards above that of the regional (16.2%) and national (15.6%) averages. At Level 4 Trafford is the highest (at 35.9%), followed by Manchester (30.4%), both of which are above the regional and national averages (25.2% and 28.1% respectively). However at 22.2% Salford has the lowest proportion of working age residents with Level 4 qualifications in the city-region core, and is below both regional and national averages.

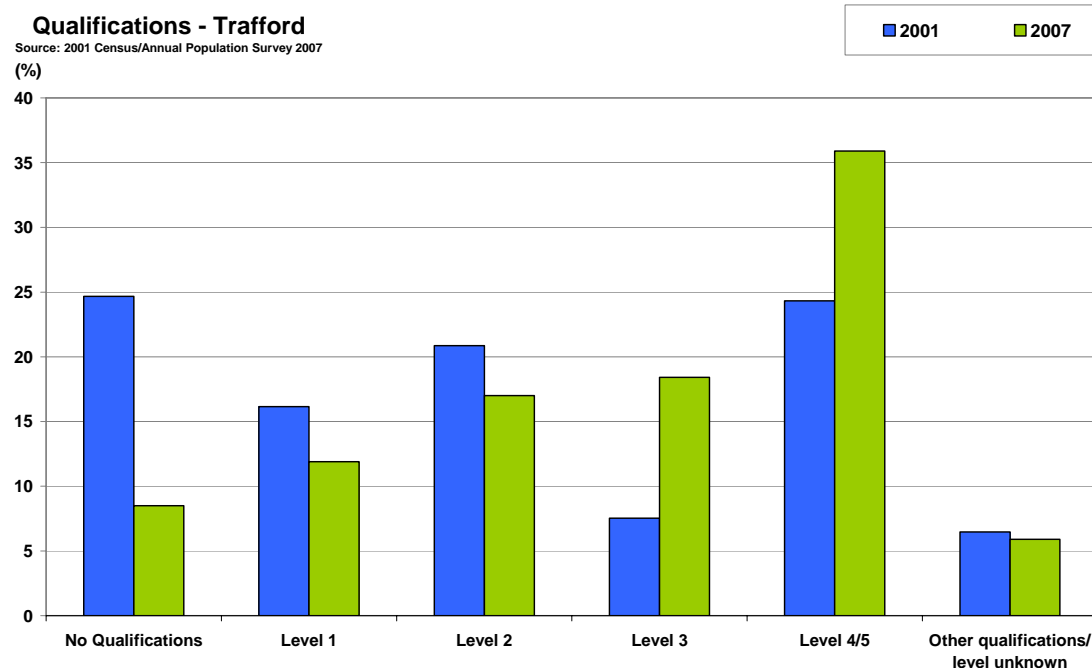
Figure 8.7



8.24 The chart below shows an isolated view of the educational development within Trafford between 2001 and 2007. The proportion of working age residents with no qualifications has fallen from 24.7% to 8.5% which represents a decrease of 16.2% percentage points, a remarkable fall in a relatively short period.

8.25 There has been a major shift within the overall workforce over the past six years with higher skilled workers, at Level 3 and 4, accounting for a much higher proportion of the overall workforce. The increase at Level 3 and 4 have been substantial, and the qualification profile is much closer to that presented by Leitch as critical for a competitive economy.

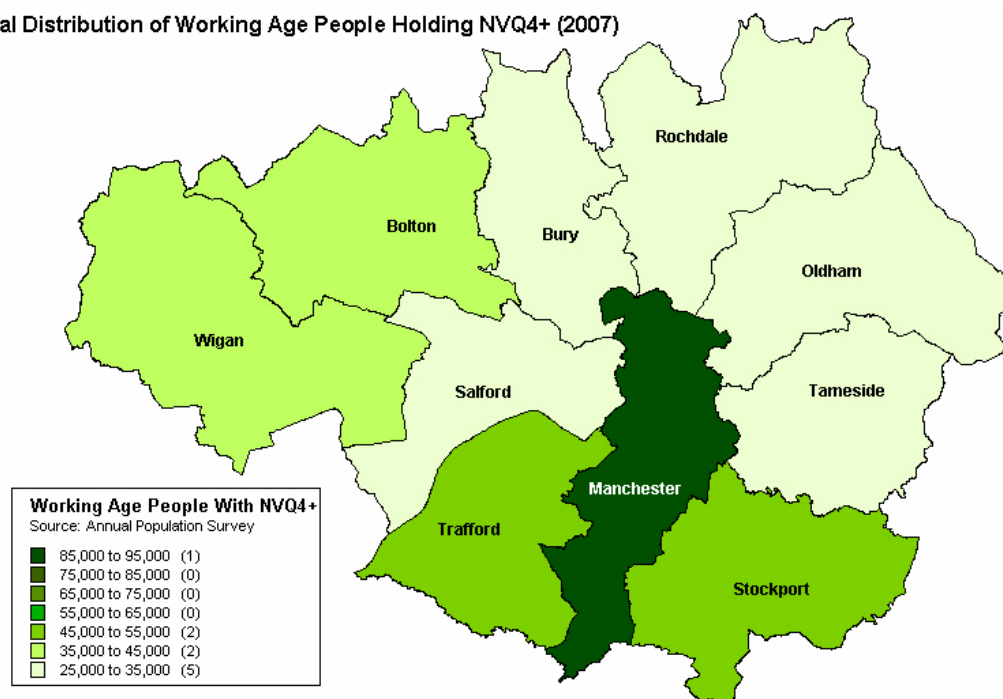
Figure 8.8



8.26 The diagram below is a representation of the spatial distribution of working age residents in Greater Manchester who have reached an educational level of NVQ4 or above. The central conurbation of Manchester, Trafford and Stockport display the highest levels of attainment with Manchester being within the 85,000 to 95,000 bracket and Trafford and Stockport being within the 75,000 to 85,000 bracket.

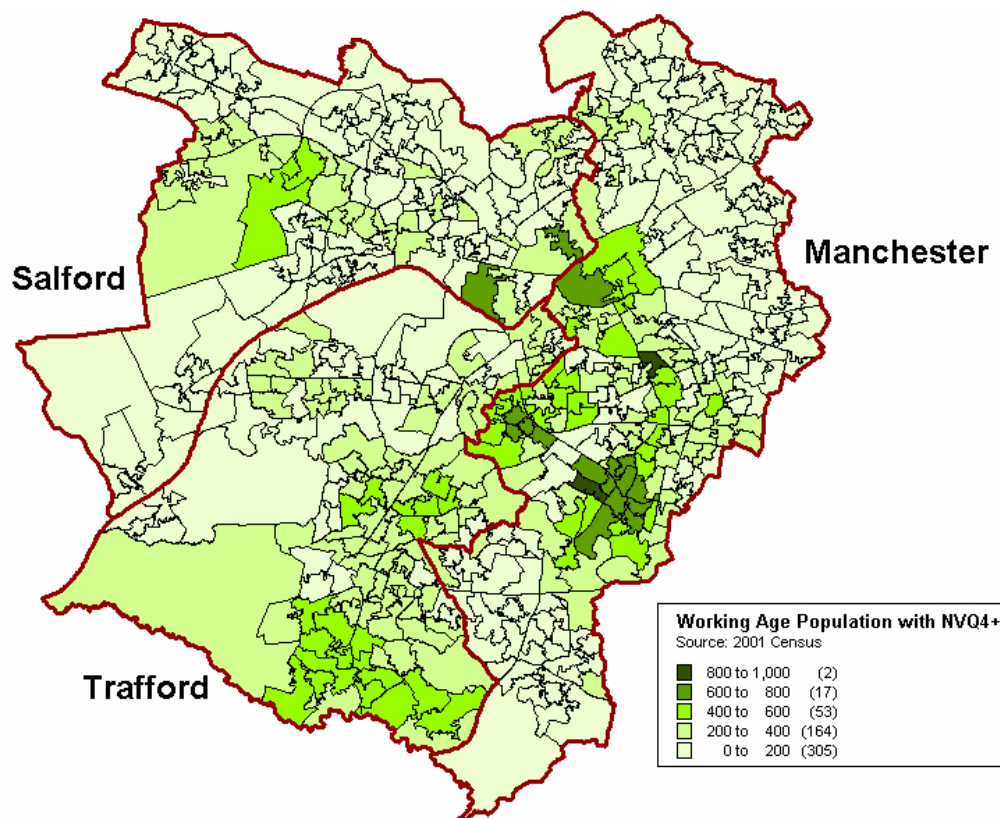
Figure 8.9

Spatial Distribution of Working Age People Holding NVQ4+ (2007)



8.27 The following map is a more detailed model of the NVQ4+ attainment within the Trafford Park Core Labour Market. The Super Output Areas (SOAs) for Trafford, Manchester and Salford are identified to better understand the educational distribution in each district. The darker areas represent the SOAs with the higher NVQ4+ levels; most of these appear to be found within Manchester and Trafford, although the north/north-east of Manchester has lower attainment levels.

Figure 8.10



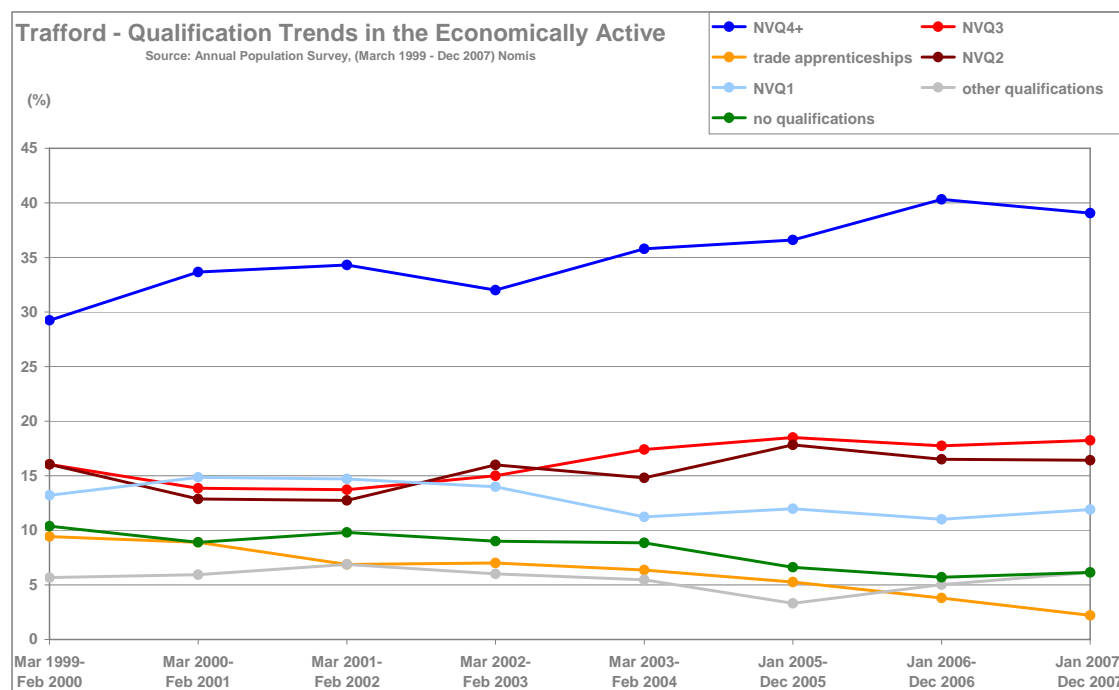
Trends of skills in the workforce

8.28 In December 2007 396% the Trafford working age population had qualification levels at NVQ 4 and above, an increase of 9.8% since March 1999. The NVQ Level 2 and 3 qualifications in March 1999 both comprised 16% of all qualifications, with the NVQ2 remaining fairly static by December 2007 while NVQ3 increased to 18.2%. In turn, the proportion of NVQ1 skills has fallen from 13.2% to 11.9% in just under 7 years, while the number of residents with no qualifications has fallen from 10.4% to 6.1%.

8.29 Although the trends in attainment in Trafford are very positive, there has been a decrease in trade apprenticeships which may in the longer term impact on those young

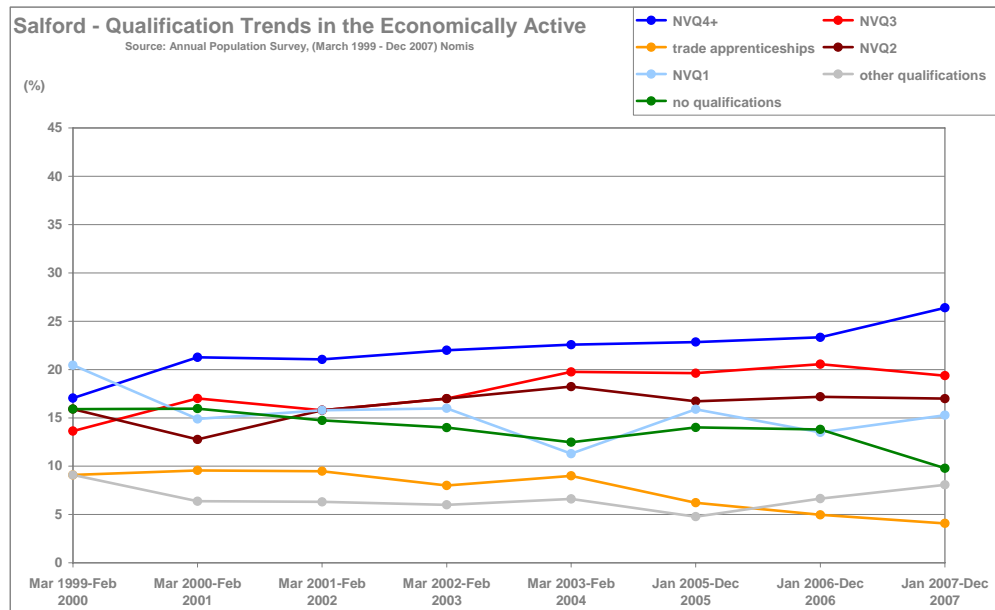
people more suited to vocational education and employment, and in particular may be an issue for many of the types of employment opportunities offered on Trafford Park.

Figure 8.11



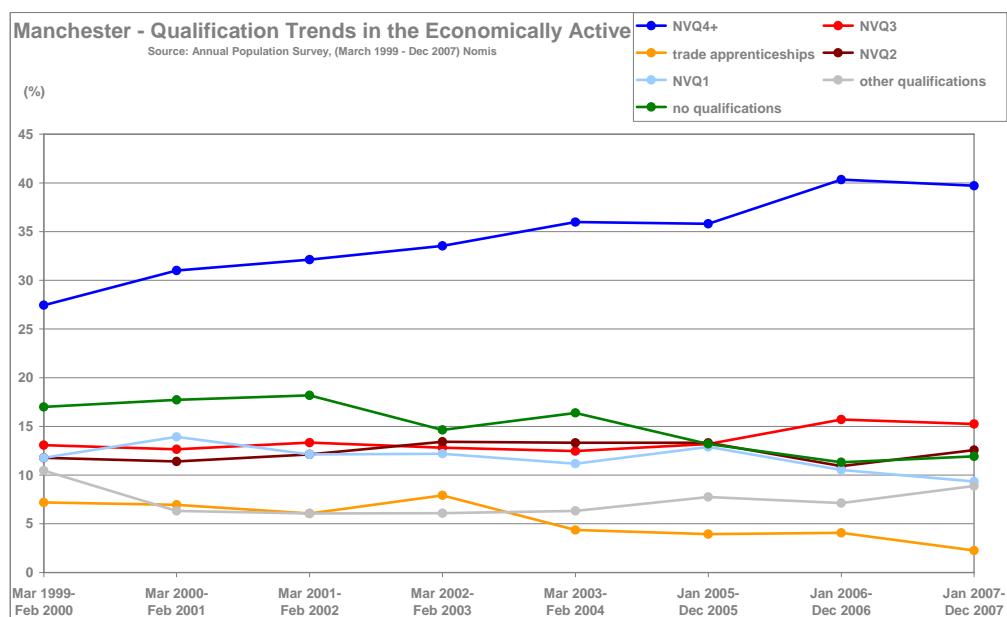
8.30 In comparison to Trafford, Salford has lower levels of attainment in all NVQ qualifications, and a higher percentage of people who have no qualifications (9.8%). The area's highest proportional skill level is still NVQ4+ standard, with 26.4% of residents in possession of this qualification in December 2007; this represents an increase of 9.4 percentage points from March 1999. Level 2 and 3 NVQ levels have increase by 1.1% and 5.7% respectively. The most marked difference between Trafford and Salford in the proportion qualified at Level 4 and above.

Figure 8.12



8.31 Manchester has the highest proportion of residents with NVQ4+ qualifications (39.7%) and also the highest increase in attainment since March 1999 (12.3%). Conversely it also demonstrates the highest percentage of the population with no qualifications as at December 2007 (11.9%), although this figure has fallen 5.1 points since March 1999. The percentage of NVQ3 qualifications has risen from 13.2% to 15.3% since Jan 2005 while in comparison, the number of NVQ2 qualifications has fallen from 13.3% to 12.6% in the same time period. Manchester has the most polarised working age population with high proportions of very well qualified people, and also high proportions with no/level 1 qualifications.

Figure 8.13



8.32 The chart below represents a snapshot of the qualifications of the economically active within Trafford Park's Core Labour Market between January 2007 and December 2007. Salford has the highest proportion of residents who have gained NVQ1, NVQ2 and NVQ3 qualifications, followed by Trafford and then Manchester.

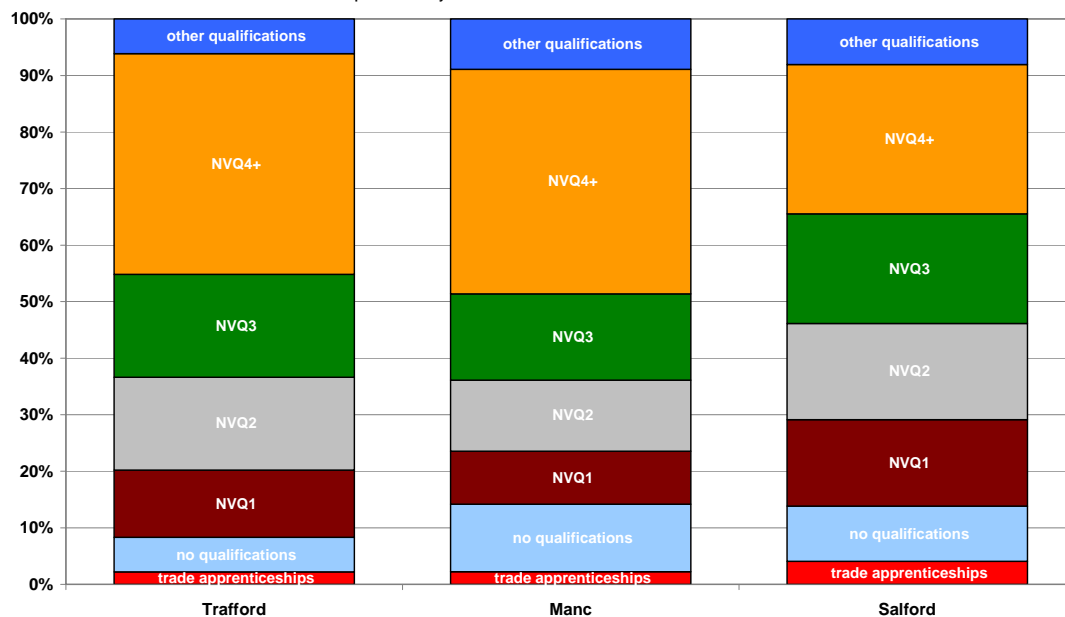
8.33 Manchester demonstrates the highest proportion of residents with NVQ4+ qualifications at 39.7% but this is almost matched by Trafford with 39.1%. Trafford falls behind at this level with only 26.4% of the population holding a qualification at this level.

8.34 Although Manchester has the highest proportion of NVQ4+ qualifications it also has the highest percentage of residents with no qualifications (11.9%). Salford has the next lowest proportion with 9.8% of residents with no qualifications, followed by Trafford with 6.1%

Figure 8.14

Qualifications in the Economically Active Jan 2007 - Dec 2007

Source: Annual Population Survey



Occupations of the workforce

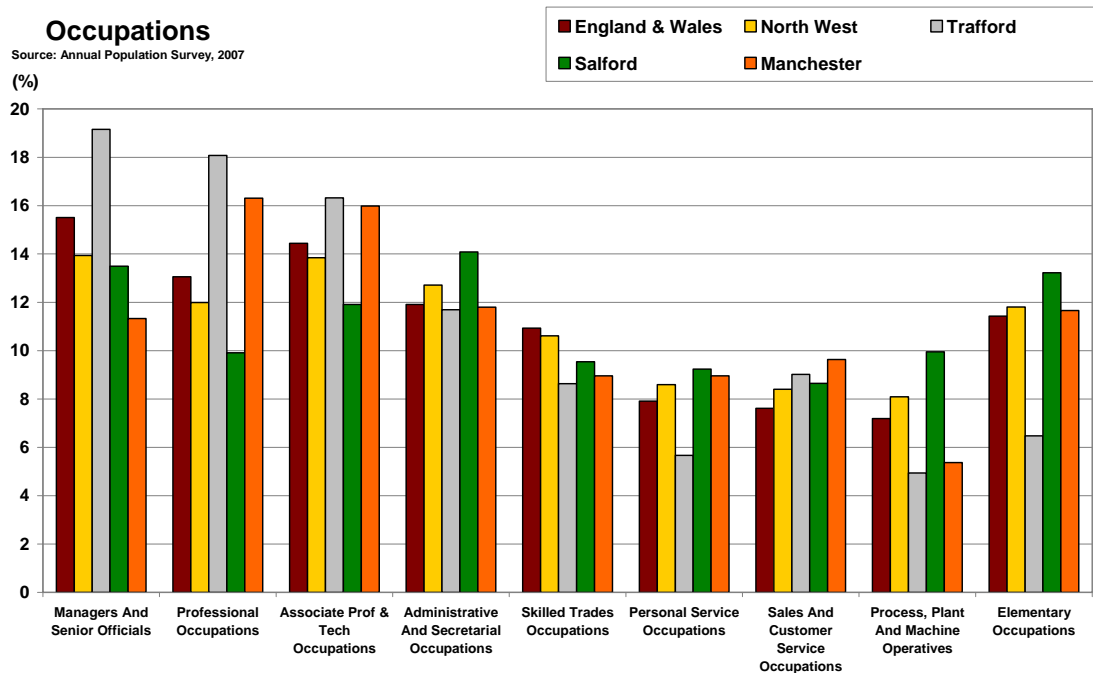
8.35 The varying occupations of the residents of Trafford, Salford and Manchester for 2007 are detailed in the chart below. In Trafford the profession with the highest proportion of workers is that of Managers and Senior Officials (19.2%), closely followed by Professional Occupations (18.1%). Overall, white collar positions are the most prevalent in Trafford.

8.36 Salford has the highest proportion of residents with Elementary Occupations at 13.2%, and the least number of professional workers at 9.9%. Administrative and secretarial occupations are also highly represented in Salford with this profession making up 14.1% of all

roles; blue collar jobs are also more prevalent in Salford than in either Trafford and Manchester. With just under 10% of employed in process, plant and machine operative roles.

8.37 Manchester has high proportions in Professional Occupations and Associated Professional and Technical Occupations, and high proportions in Personal Services and Sales, reflecting the growth of the service economy in the City.

Figure 8.15



Occupation trends

8.38 Out of the three local authorities within the core labour market of Trafford Park, **Trafford** has the highest proportion of managers and senior officials with 19.9% of the region's working population employed in this capacity as of December 2007. It also has the highest percentage of professionals which have risen from 14.4% in March 2001 to 17.5% in December 2007. Residents working in associate professional and technical positions and administrative and secretarial roles are also within the highest in the area and represented 15.4% and 12.3% respectively in December 2007. The professional with the lowest representation are residents who work as process plant and machine operatives who fell from 6.1% in March 2001 to 5.5% in December 2007. Sales and customer services roles peaked from 7.5% in March 2001 to 10.1% by January 2006, but have since fallen to 8.4% in December 2007.

8.39 The highest representation of occupation within **Salford** is for administrative and secretarial roles which were 14.7% in March 2001 and rose slightly to 14.9% by December 2007. Elementary roles have declined from 14.1% to 11.6% and skilled trade occupations

have also fallen from 12.6% to 9.7%. With the exception of these two professions, all other occupations have seen an increase in the percentage of the working population that they represent.

8.40 In March 2001, Manchester had the highest residents in elementary positions (16.3%). This high proportion of workers was fairly static until December 2006 where the percentage fell to 11.7%, it has since remained at this level. The second highest proportion of residents have historically been employed in professional occupations, representing 16.4% of all economically active residents at its highest in March 2003, falling slightly by December 2007 to 15.5%.

8.41 The most dramatic occupational increase has been with those who work in an associate professional & technical capacity; up until December 2005 this profession was represented by approximately 12% of the working population. This percentage has since climbed to 17.6% of the working residents by December 2007 and is now the most common profession for Manchester working residents. For the most part, the least represented profession has been process plant and machine operatives with only 5% of Manchester's employed working in this field in February 2005, rising only slightly to 6% in December 2007.

Figure 8.16

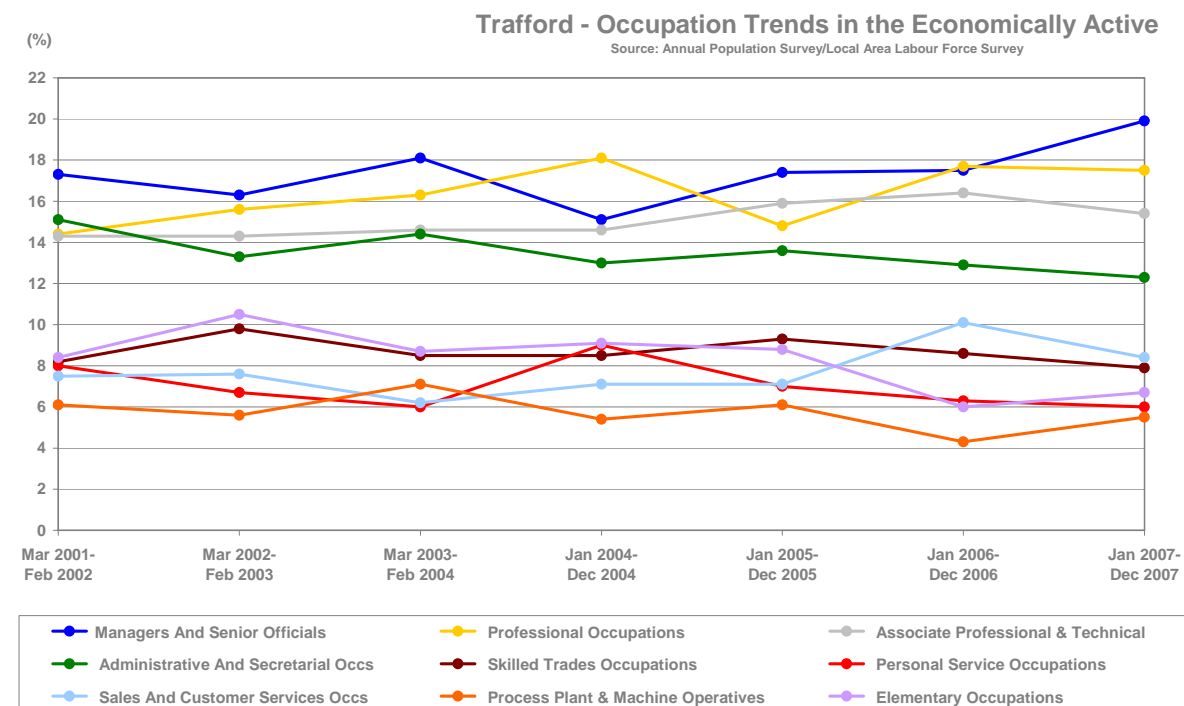


Figure 8.17

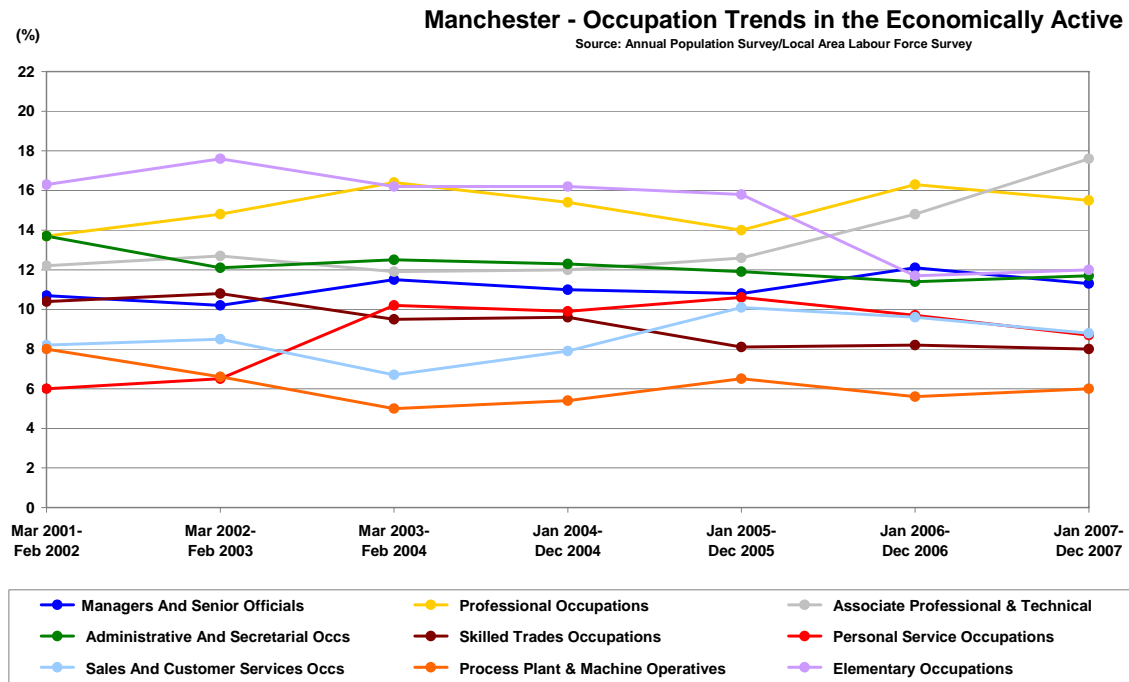
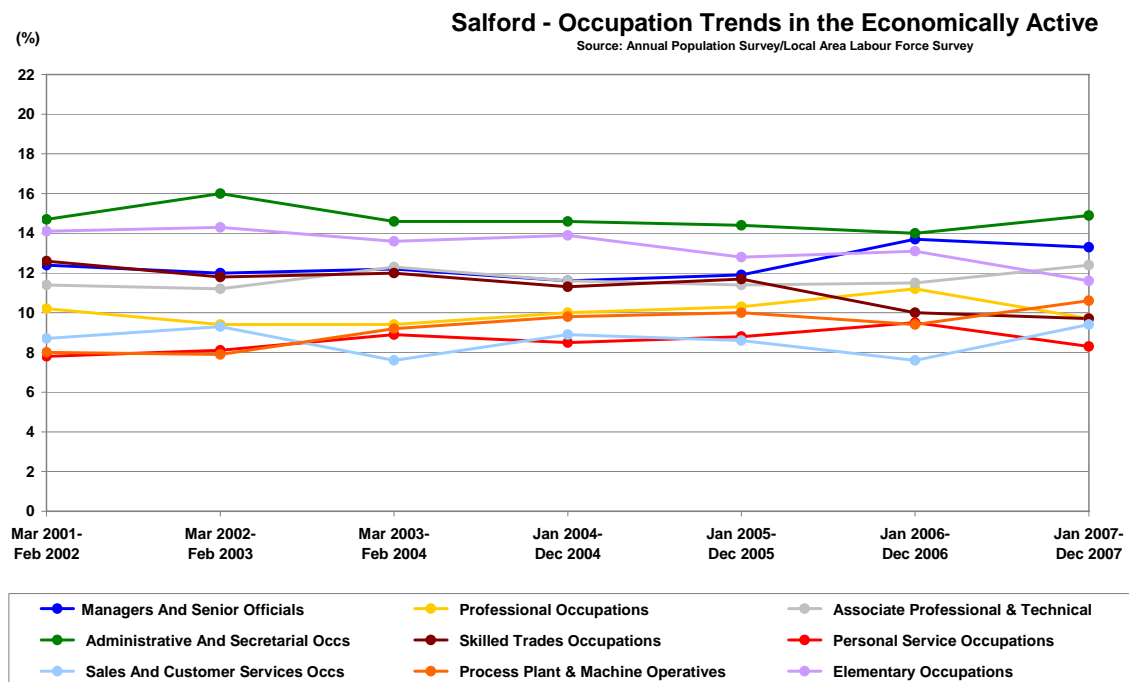


Figure 8.18



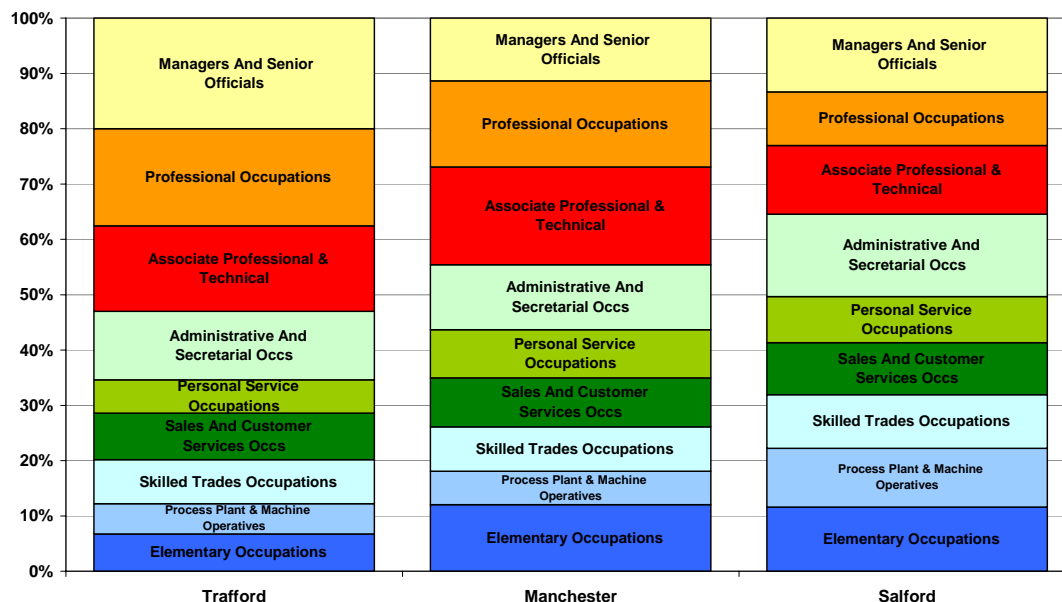
8.42 The below chart represents a snapshot of the occupations of the economically active between January 2007 and December 2007. The occupations shaded in blue represent blue collar positions, the green shaded occupations represent blue/white collar positions and the red shaded occupations represent more white collar positions.

8.43 It illustrates that Trafford has a higher representation of white collar jobs, followed by Manchester and then Trafford. In contrast, Salford has the highest proportion of blue collar jobs, followed by Manchester and then Trafford.

Figure 8.19

Occupations of the Economically Active Jan 2007 - Dec 2007

Source: Annual Population Survey/Local Area Labour Force Survey



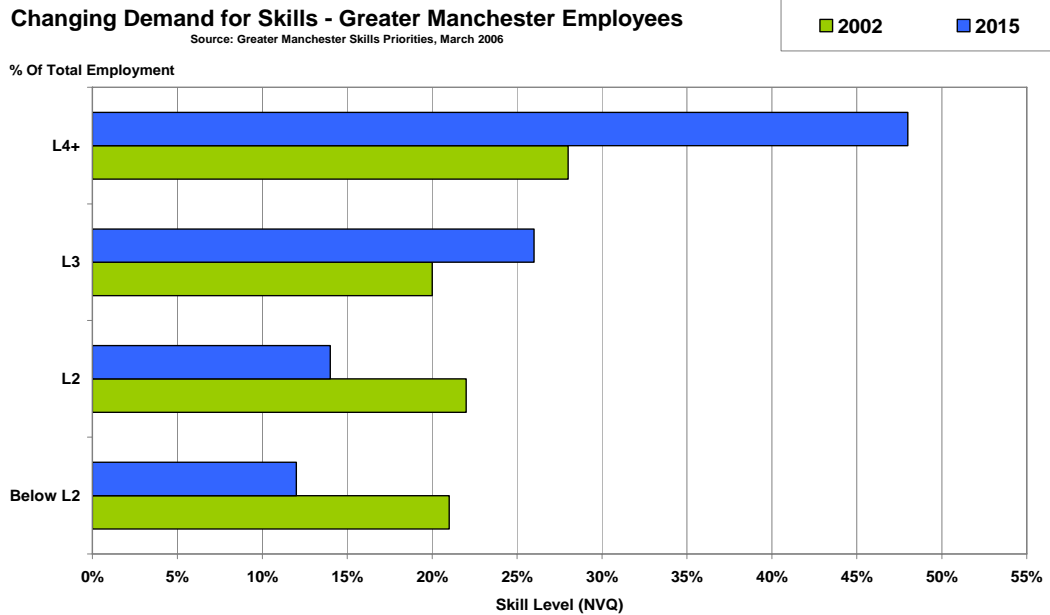
Skills Trends and Demand by Sector

8.44 This section looks at the projected changes in skills requirements which will be expected to occur overall within Greater Manchester, and also by the main four industries that were previously identified in Table 3.1, namely - Manufacturing, Distribution & Retail, Transport & Communications and Financial Intermediation & Business Services. This information is not available at a district level, and so information from the Greater Manchester model has been used for this analysis.

8.45 The chart below details the overall expected shift in skills requirements for Greater Manchester between 2002 and 2015. This diagram illustrates the prediction of the need to upskill the workforce, and as set out earlier, this process is already underway.

8.46 The target figure for 2015 is 47% at level 4, a figure which the three core districts have yet to meet, although Trafford has made substantial progress in the last five years.

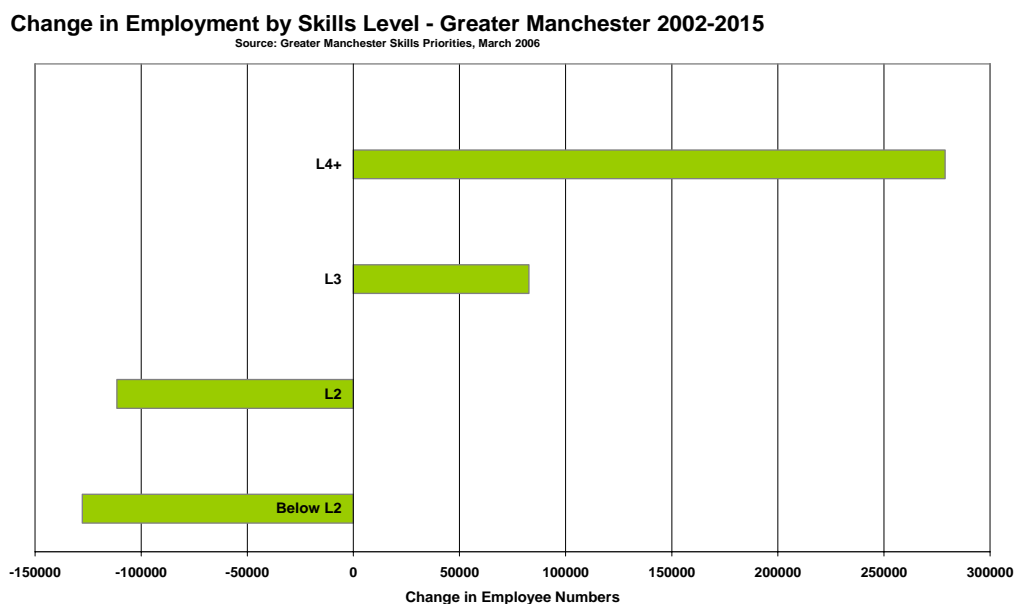
Figure 8.20



8.47 This next chart shows the projected actual change in employee numbers with required skills by 2015. As mentioned, Level 3 and 4+ qualifications are expected to be in higher demand, whereas need for level 2 and below qualifications is expected to fall.

8.48 By 2015 there is expected to be a requirement for 82,708 additional employees with Level 3 qualifications and 278,824 with Level 4+ qualifications within the workforce based on 2002 employment figures. Conversely, there is expected to be a need for 239,200 fewer employees with Level 2 or below qualifications in the workforce.

Figure 8.21

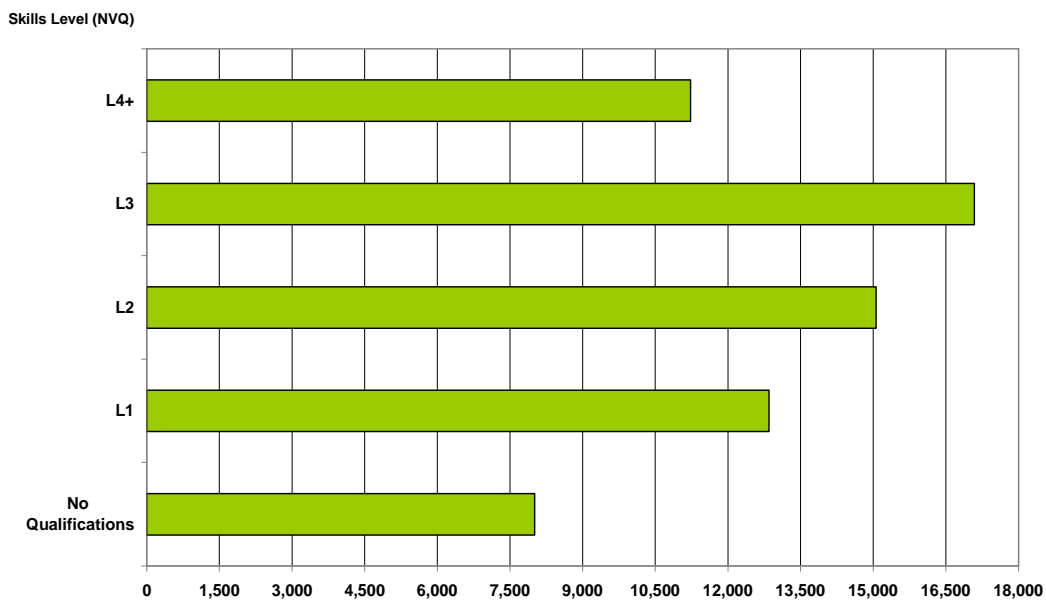


8.49 The following chart detail the expected shift in skill requirements for the Manufacturing industry within Greater Manchester. The fact that each skill level is expected to grow indicates that while the industry as a whole is expected to decline, higher skills level will be required to work within this industry. The largest shift in skill requirements is expected to be for Level 3 qualifications; there is projected a need for 17,090 additional employees at this skill level by 2026 based within the workforce on 2002 employee figures.

Figure 8.22

Change in Manufacturing Skill Level Requirements 2007 - 2026

Source: Greater Manchester Futures Model, 2007

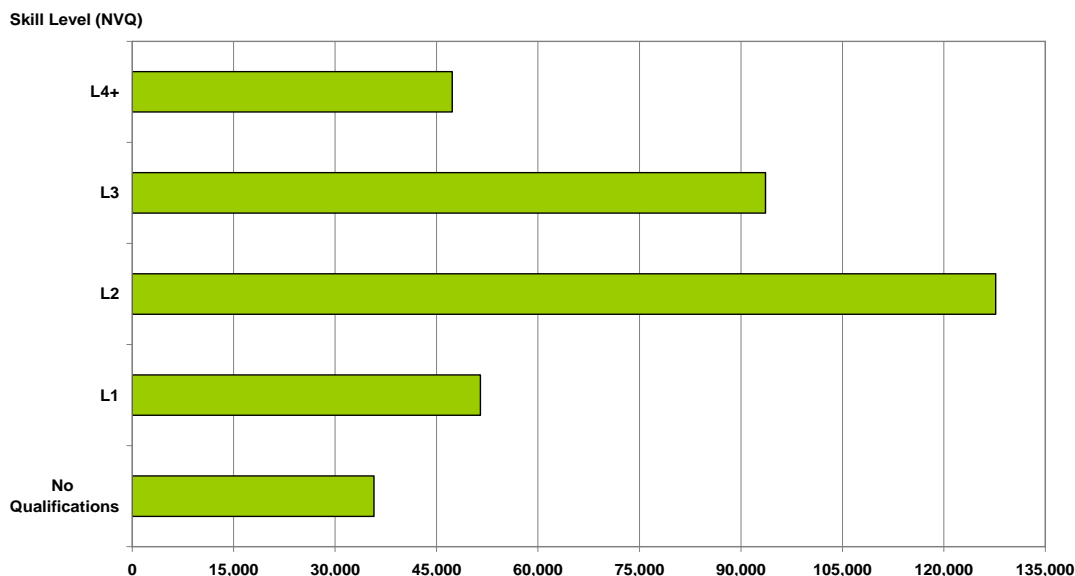


8.50 The distribution and retail industry also demonstrates increases across the workforce, with the largest change at level 2, with an additional 127,680 employees required by 2026. Although it is likely that employees with no qualifications will still be employable within this industry, there will only be an additional 35,750 positions available from 2002.

Figure 8.23

Changes in Distribution & Retail Skill Level Requirements 2007 - 2026

Source: Greater Manchester Futures Model, 2007

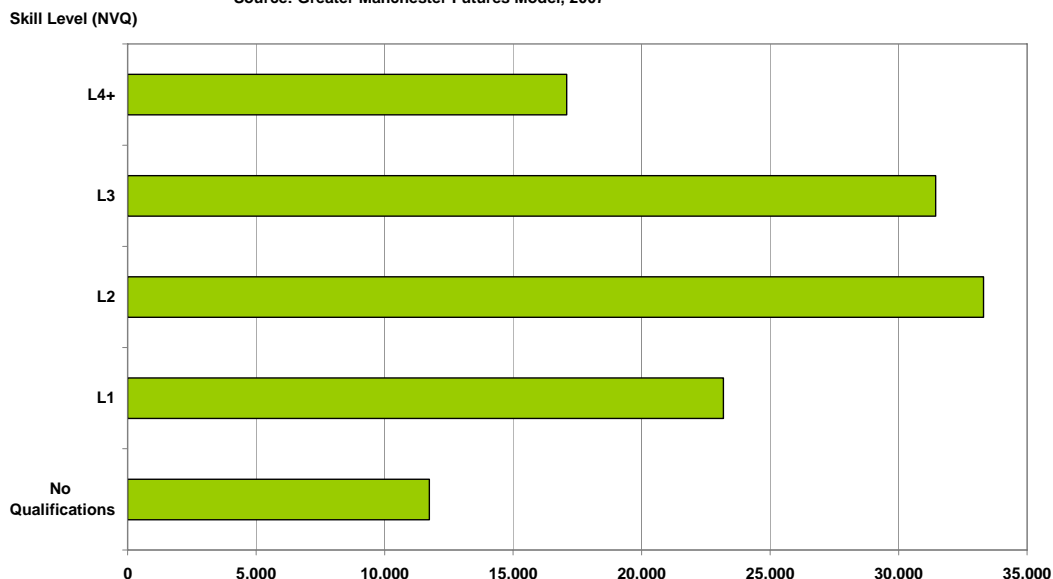


8.51 The Transport and Communications industries show that the skill levels that are projected to be most in demand by 2026 are Level 2 and 3 with an increase on 2002 figures of 33,300 and 31,440 respectively.

Figure 8.24

Changes in Transport & Communications Skill Level Requirements 2007 - 2026

Source: Greater Manchester Futures Model, 2007



8.52 The Financial Intermediation & Business Services industries show the most pronounced increase in expected demand for higher level qualifications. There is projected to be an additional 113,060 employees with Level 4+ qualifications required by 2026 based on 2002 employment figures. An approximate 75,000 additional Level 2 and 3 qualifications are

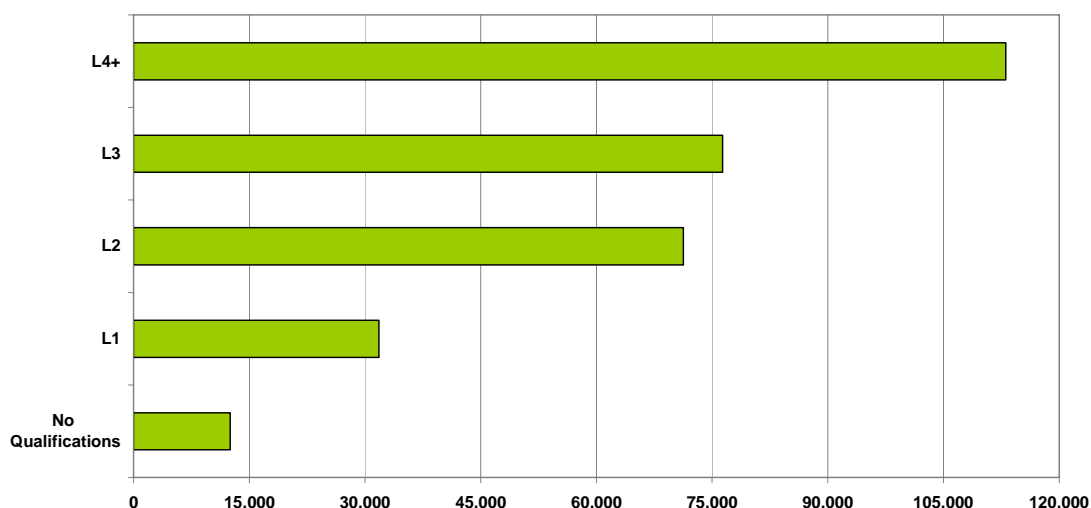
anticipated to be needed by 2026 along side the Level 4+ requirements, but there will be fewer positions available within this industry for employees with no qualifications.

Figure 8.25

Change In Financial Intermediation & Business Services Skill Level Requirements 2007 - 2026

Source: Greater Manchester Futures Model, 2007

Skill Level (NVQ)



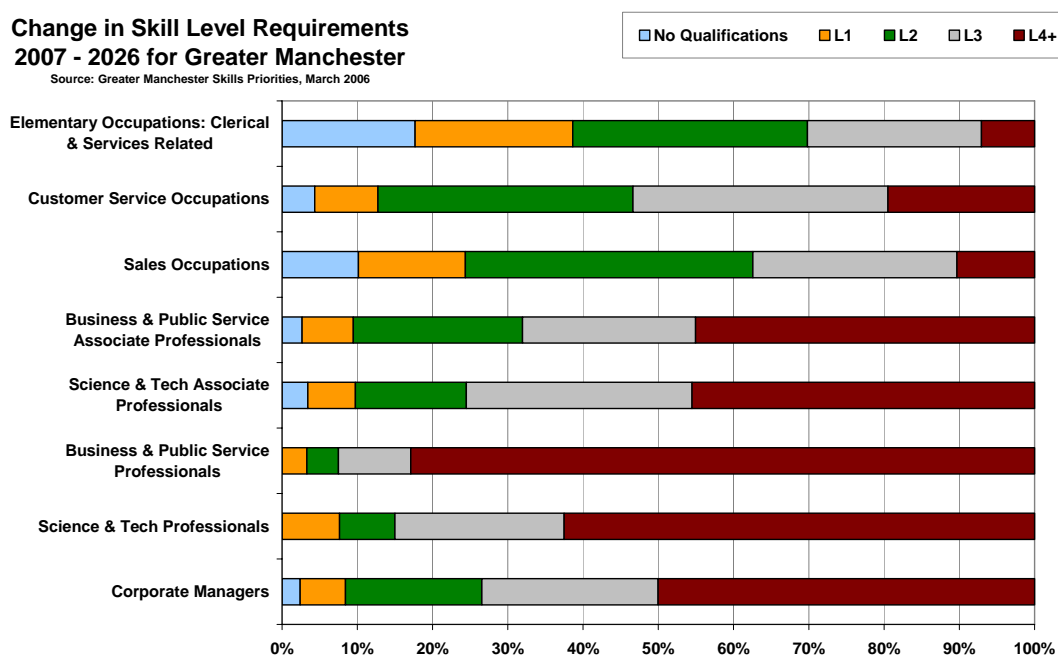
8.53 The following table provides an overall view of the projected shift in skills requirements by occupation between 2007 and 2026. An entry of 0% increased requirement indicates that it is unlikely that this level of qualification will be desirable for a particular occupation by 2026, or that the quota of required employees with this qualification are already employed.

8.54 This chart demonstrates the higher skill levels that will be required as a standard for specialist occupations such as business, public service, science and tech professionals, and an increased need for Level 2 and 3 qualifications in professions such as customer service and sales occupations. The latter two professions are expected to still employ individuals with no qualifications by 2026 but this is likely to be due to the in-house nature of training in these professions. The only occupation which will not be expected to demonstrate majority higher end qualifications are the elementary professions.

Figure 8.26

Change in Skill Level Requirements 2007 - 2026 for Greater Manchester

Source: Greater Manchester Skills Priorities, March 2006

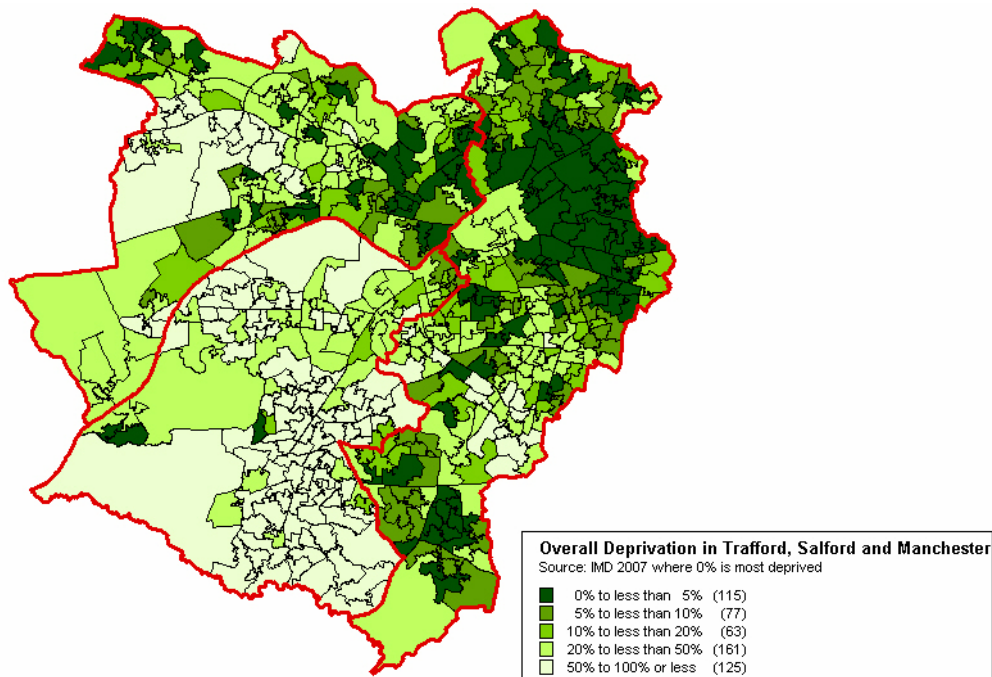


Deprivation and Economic Inactivity

Deprivation

8.55 Trafford, Salford and Manchester have a very different deprivation profiles, but overall Manchester is the most deprived, followed by Salford, with Trafford the least deprived. The following plans map out deprivation levels across the three districts for each super-output areas (SOAs), levels of deprivation increasing from pale through to dark shadings:-

Figure 8.27



8.56 There is a dense area in north and east Manchester which are collectively ranked within the top 5% of most deprived super output areas within England, and is one of the largest concentrations of deprived communities in England. This area was previously highlighted as a part of Manchester which has a low proportion of residents commuting into Trafford Park.

8.57 The remainder of Manchester appears to generally lie within the top 5%-20% of most deprived areas, with pockets of higher deprivation towards Wythenshawe in the south and surrounding the city centre. Some areas to the south of the centre of Manchester demonstrate low levels of deprivation, falling outside of the top 50% of the worst affected areas, including areas such as Didsbury and Chorlton, which are Manchester's affluent neighbourhoods.

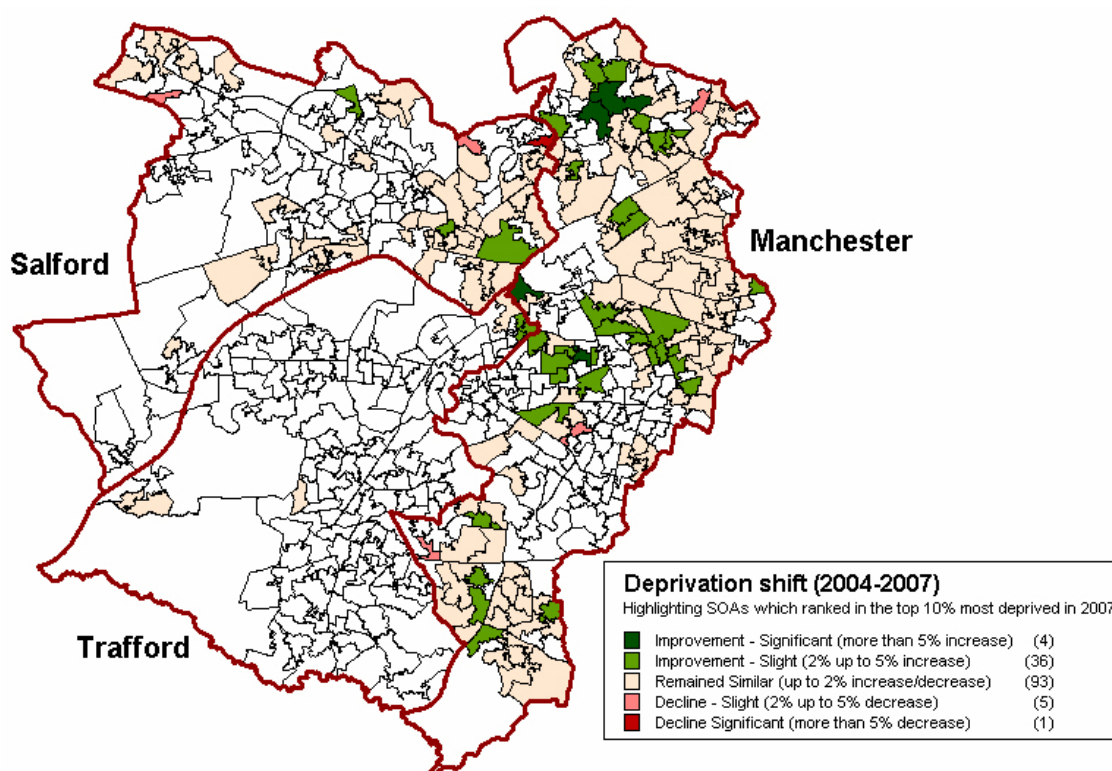
8.58 Salford has fewer super output areas which fall within the top 5% of most deprived in England, and the ones that do are towards the eastern border with Manchester, or towards the north-westerly border. The western part of Salford has a large and more prosperous areas, this area includes the suburbs of Worsley and Boothstown & Ellenbrook. Towards the south of Salford are the Irlam and Cadishead neighbourhoods which while not as affluent as Worsley still fall outside the top 20% of most deprived areas.

8.59 Trafford is the least deprived district within the Trafford Park Core Labour Market area, there are only three super output areas which are within the top 5% of most deprived areas in England, with the overall majority of the district ranking in the top 50% of least deprived national areas. The most deprived areas within Trafford generally fall around Partington, to the east of Salford's Cadishead border, and to the west of Manchester's central

region around Old Trafford. Trafford Park itself has a low level of deprivation, although this is likely to be attributed to its relatively limited residential offer and hence population.

8.60 Deprivation shift (2004/07) for SOA which ranked in the top 10% most deprived in 2007. The coloured parts of the map below indicate the super output areas within Trafford Park's Core Labour Market which were ranked within the top 10% of most deprived areas nationally in 2007. What the map shows is the 'improvement/decline' of these areas between 2004/07:-

Figure 8.28

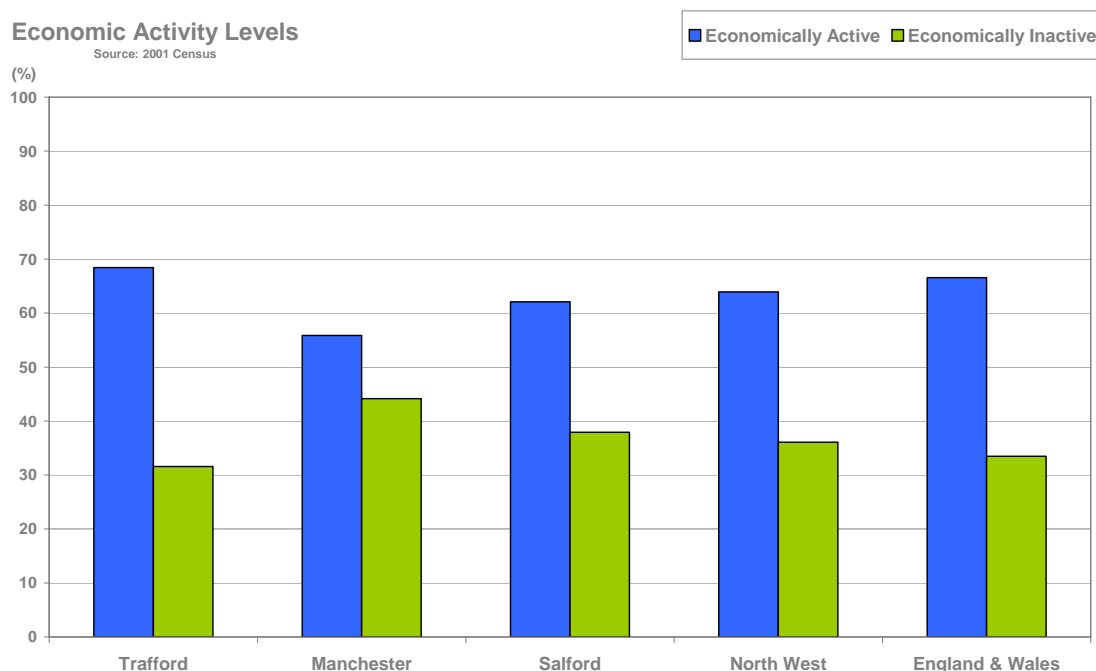


8.61 Trafford is shown to have the least number of areas within the top 10% of most deprived SOAs and for all but two of these areas there has been little change between 2004/07. There are two SOA which lie very close to Manchester city centre and these areas have seen improvement but they are still ranked in the top 10%. Salford has a higher proportion of top 10% deprived SOAs, and again, the majority of these have shown little or no change in the three year period. Manchester holds the highest number of top 10% deprived SOAs, although this is expected as Manchester is one of the most deprived districts nationally. Overall most of the areas have remained at a similar standard, although a significant proportion has seen distinct improvements, whilst still ranking poorly.

Economic Inactivity Rates of Trafford Park Core Labour Market

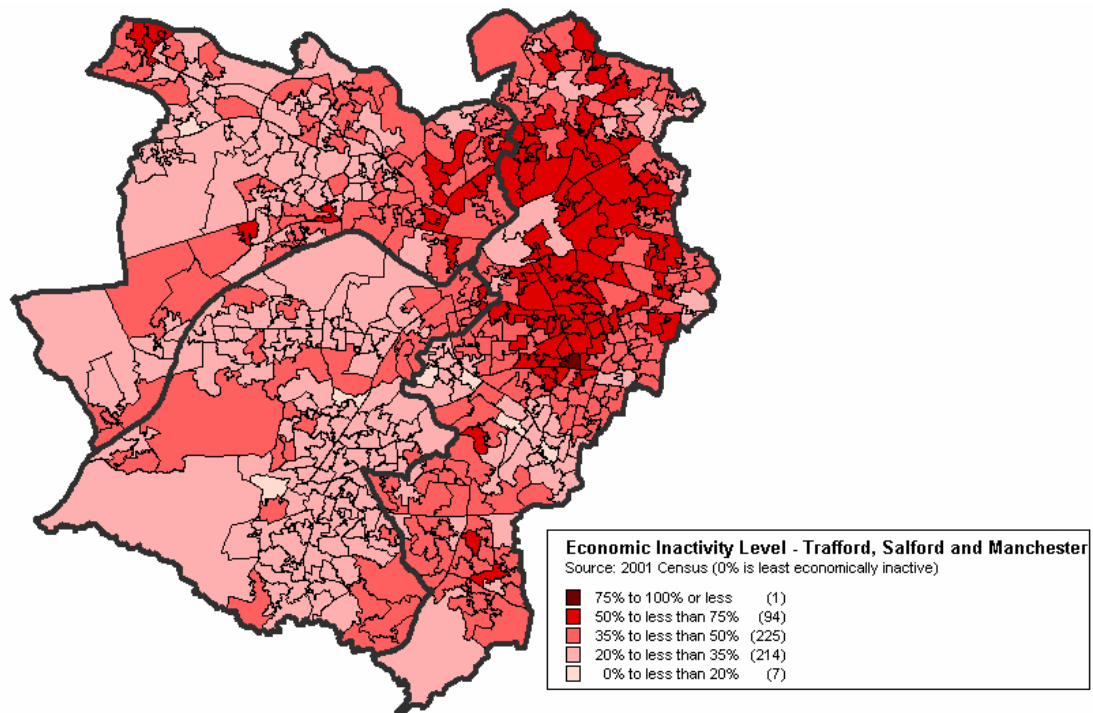
8.62 Economic activity levels show the proportion of the population who are in employment or seeking employment, with the national average being 66.5% as of the 2001 Census. The below chart compares the economic activity levels of the districts which constitute Trafford Park Core Labour Market, and the regional and national averages.

Figure 8.29



8.63 Trafford is the only district which has a higher economic activity level (68.4%) than the regional (63.9%) and national averages although this area is fairly affluent in parts and so this can be expected. Salford demonstrates the second highest economic activity level at 62.1% followed by Manchester with 55.8%.

Figure 8.30



8.64 When represented visually on the above map, the high level of economic inactivity within Manchester becomes quite apparent, with a large majority of the SOAs claiming between 50% - 75% of the residents are economically inactive. Within Trafford and Salford, the areas which were previously defined as less deprived are in turn demonstrating lower levels of economic inactivity.

Summary and Conclusions

8.65 Looking forward the main conclusions to be drawn from this section are around the need for the upskilling of the core labour market population in the core of the Manchester city-region. This is highlighted by the fact that respondents to the Business Survey stated that almost 40% of their employees came from outside the city-region core ie. employees are being 'imported' from other parts of the sub-region. The trend at present in terms of employment opportunities is for higher level qualification (Level 3 and above) being considered either an essential or highly desirable feature of potential employees; conversely employees offering lower level or no qualifications will find it harder to access employment opportunities at Trafford Park and other key employment locations in future, especially those that offer better earnings and prospects. In this sense Trafford is relatively well placed, with a high percentage of working age residents having higher level skills and low proportion with none or very low level qualifications. However this borough-wide picture needs to be balanced with the knowledge that there are parts of Trafford where the skills levels of the

working age population differ greatly from the rest of the borough, notably around existing areas of deprivation in Partington and Old Trafford. Whilst these areas have seen significant improvement in overall deprivation levels over the past 5 years, it is important that there is continued focused efforts on ensuring that the existing and emerging working age population are developing the level of skills and qualifications to enable them to access and participate fully in the likely future labour market, including opportunities which will arise very close by at Trafford Park.

8.66 It is likely that vocational skills which are at a higher level - for example technical skills, often gained by way of structured apprenticeships - will still remain in demand, partly driven by the lack of investment in training opportunities and the highly-specialised nature of some of these kinds of jobs. Again, it is important that there is continued focused efforts on ensuring that the existing and emerging working age population in areas of existing deprivation that are interested in developing higher-level vocational skills are fully supported to ensure that they have full access to potential employment opportunities which will arise very close by at Trafford Park.

8.67 Trafford has the highest proportion of residents which work in white collar position and who are also educated to a higher level than the rest of Trafford Park's core labour market. Salford has the corollary, with a lower proportion of working age residents on white collar positions and a higher percentage of its population working in blue collar roles. Trafford is therefore well-placed in terms of the likely nature of employment opportunities which it is predicted will emerge from Trafford Park, although it will be important to ensure that all communities within Trafford borough are given equal opportunity to develop the skills to enable them to access these opportunities.

9 Case Studies

Introduction

9.1 This chapter examines various regional, national and international case studies strategic employment sites and business parks; focussing initially on Strategic Employment Sites and how Trafford Park might better position itself on a regional level.

9.2 This is followed by national and international case studies, outlining examples of best practice and lessons which can be applied to Trafford Park in order to move it to the next stage of evolution in it's development.

Strategic Employment Sites in the North West

9.3 There are 21 Strategic Regional Sites in the North West Region, comprising large allocated employment sites with specific policies allocated to the sites by the NWDA. Potential occupiers will be directed to locations where their use is best suited to economic policies. Consequently, any attempt to change the use profile of Trafford Park will need to be supported by the NWDA. Potential uses that compete with other Regional Employment sites in the Greater Manchester area, are also likely to be challenged. The following section describes each of regional employment sites in Greater Manchester and then goes on to identify significant Regional Employment sites from other areas in the North West.

9.4 **Ashton Moss, Tameside** – a 58 hectare site located between Ashton-Under-Lyne and Droylsden. The site is directly adjacent to the M60 orbital motorway and is allocated for high quality employment development including B1b research and development, B1c light industry, B2 general industry, B8 storage and distribution as well as employment uses in similar character. The scheme also includes a car showroom and C1 Hotel use.

9.5 Ashton Moss is being promoted as being within East Manchester by Muse Developments and Stayley Developments. To date, the first phase of office development has attracted occupation by the Office Depot (287,000 sq ft), Norbain (51,000 sq ft), Selco (40,000 sq ft) and Car People (22,000 sq ft). Elsewhere within Ashton Moss, a Leisure Scheme has largely been completed which includes a multiplex cinema, bowling alley, pub and De Vere Village Hotel. The scheme has also included a new 78,000 sq ft Sainsbury's supermarket, with a further 37,000 sq ft of non food retail use.

9.6 Whilst not as strategically located as Trafford Park, Ashton Moss is still close to the M60 and has mixed use potential for offices and industrial accommodation. If the Metro Link extension takes place, Ashton Moss will be connected to the Central Manchester network. The scheme is likely to attract industrial occupiers as opposed to office occupiers due its location and the limited retail and leisure facilities within walking distance (office occupiers

prefer to have shops and leisure facilities in close proximity and will prefer established office centres).

9.7 **Barton, Salford** – an 80.9 hectare site, located between Eccles and Irlam on the south side of the A57 close to its junction with the M60 (junction 11). The site is allocated for light and general industry as well as distribution and ancillary offices and other uses. Its focus will be for a multi modal freight interchange incorporating rail and water based freight handling facilities as well as a new rail link to the Manchester / Newton Le Willows/ Liverpool railway. The scheme is in the ownership of Peel Holdings and includes a new 20,000 seat sports stadium, for which construction has just commenced. The proposed use of this site is specialised and will provide inter model freight facilities which occupiers of Trafford Park could benefit from.

9.8 **Carrington, Trafford** – The Carrington site is largely in the control of Shell with some Peel ownerships in places. Proposals are in place to create a major inter model rail served facility within a site of approximately 40 Hectares. Not only will this provide additional infrastructure to the area this site could provide a future location for distribution occupiers within Trafford Park should higher value uses continue to expand.

9.9 **Davenport Green, Trafford** – The site is reserved for a major international headquarters and is very unlikely to be brought forward in the immediate future due to its greenbelt location.

9.10 **Kingsway Business Park, Rochdale** – The site of 170 hectares is allocated as a high quality Business Park to attract modern industry and businesses and provide opportunities for indigenous companies who wish to expand. There is a particular focus on knowledge based and manufacturing industries. The site has been brought forward by the NWDA, Wilson Bowden Developments Limited, Rochdale MBC and Rochdale Development Company. Whilst progress has been made on some of the infrastructure, a number of transactions have not progressed included a De Vere Village Hotel and a sale of a site to Zen International.

9.11 **Central Park, East Manchester** – The site covers an area of 182 hectares of predominantly brownfield land located approximately 3km from the City Centre. Delivery of the site is being coordinated by New East Manchester URC. In March 2005 construction of a 13,900 sq meters business village was completed and pre-let to Fujitsu. Construction of an £18.5m Science and Enterprise Park (a co-operative venture between Greater Manchester's four Universities and ManCat) known as One Central Park has been completed.

9.12 A £36m transport hub has also been constructed and is awaiting the further expansion of the Metrolink to be fully operational. The area is clearly focused on becoming a technology and science park and has the infrastructure in place to secure such occupiers. To

date, however, some occupiers have been put off by the arterial corridor between Central Park and the City Centre, although this will change as the scheme progresses. It is also clear from Regional Economic policies of the NWDA that potential enquiries for science and technology uses will be directed towards East Manchester.

9.13 In Greater Manchester there is a total provision of approximately 5million sq m (54million sq ft) of office accommodation according to information provided by the Valuation Office. In the Central Manchester core alone, there is approximately 2 million sq ft of vacant accommodation available and occupiers are in a strong position to negotiate favourable terms. The effect of the 'credit crunch' has led to greater incentives being offered to occupiers by landlords. Rent free periods for Manchester City Centre offices have reached 2-3 years for a 15 year lease. However, with a worsening economy it is anticipated that these incentives will increase with the positional shift to a very favourable tenants market.

9.14 The appeal of Trafford Park as an industrial distribution location is primarily due to its strategic location. Distribution and Retail companies favour the North West as a Regional Centre as the M6 provides a better distribution corridor than the A1, which in many parts is limited to a dual carriageway. The North East of the Country can be serviced by using the Trans-Pennine routes of the M62 and A66. Consequently, a distribution facility in the North West can service a much wider area than other potential locations.

9.15 As well as other industrial sites in Greater Manchester, there is a need to consider other locations in the Mersey Corridor. Warrington has also developed as a strong distribution location due its position at the interchange of the M6, M62 and M56 motorways. The main distribution facilities are located around the Birchwood and Gemini Areas of the town. Earlier distribution centres around the A49 corridor have moved to the outskirts due congestion within the town. Rental Values are slightly lower than Trafford Park. Other areas such as Skelmersdale, Preston and Runcorn have also established themselves as industrial locations, mainly due to the availability of cheap land. Many of the former New Town areas were planned on the assumption that major employers would include traditional manufacturing companies. When the market sector declined, the areas were left with substantial vacant sites, many of which had ground condition problems which became attractive to the industrial warehousing sector whose location is not dependant upon immediate motorway access, although, each of the New Towns do provide easy access to the motorway network.

9.16 The following Regional Employment Sites are areas whose delivery could potentially impact on Trafford Park. There are four of these sites in the Warrington and Merseyside area and are detailed in the following section.

9.17 **Omega, South Warrington** – The site covers an area of 190 Hectares of which 130 acres are included within the Regional Investment Site location. Historically this was the site of the US Air Force Base but ground condition problems led to it being unsuitable for use by

the US Military, which led to its subsequent closure in the 1950s. Warrington was designated a New Town Area to address the resultant job losses that arose from both the closure of the base and other MOD sites within the town. Since this time, Omega has been held in reserve as a Strategic employment site. In 2003, a joint venture was entered into between Royal Bank of Scotland, English Partnerships and Miller Developments. As part of the scheme, English Partnerships funded the installation of a new Motorway junction on the M62.

9.18 Regional economic policies for the site are focused on it being a regional flagship site for inward investment for the knowledge based industries and provide growth for indigenous companies who wish to expand in a quality environment. To date there has been little progress of development although schemes have taken place at neighbouring sites – office development has taken place at Lingley Mere and English Partnerships have sold a section of North Omega for a distribution facility. In the current economic climate, it is unlikely that Omega will be commercially viable as a Technology Based Centre and potential occupiers will be directed to established locations at East Manchester and Daresbury Park. It is possible that Omega's future use allocation could be amended to include industrial and distribution uses and will compete with Trafford Park

9.19 **Daresbury Park** – The site is located North East of Runcorn, near junction 11 of the M56. It has developed around an atomic laboratory facility and provides 5,575 sq m of office/laboratory accommodation. In addition to which two facilities comprising of a £27m base for over 100 scientists and engineers and a 2230sq m innovation centre have recently been completed. Adjacent to the Employment site is an office scheme being which has developed over the past decade around the De Vere Daresbury Park hotel. The scheme was a joint venture between De Vere Hotels and Maple Grove who have since sold the site to Marshall Developments. The scheme has been very successful and is about 75% complete. Rentals have been around £16.50 per square foot.

9.20 The uses attracted to Daresbury Park are very specialised and are unlikely to compete with Trafford Park as an industrial location. However, if Trafford Park uses were to be diversified it would be competing with Centres like Daresbury Park, which have specialist facilities on site.

9.21 **Ditton, Widnes** – The site comprise an area of 183 hectares on the western side of Widnes. The site's core lies to the south of the Liverpool Branch Line and has Regional Policies to develop the site as an intermodal rail freight centre. The site developed as a container distribution facility and has recently been acquired by Eddie Stobart following their acquisition of the O'Conner Group. The A5300 gives access to the M62 and the M56 via the Runcorn/Widnes Bridge. Access to the site is restricted by traffic congestion and Halton Borough Council have plans to construct a New Mersey crossing which is likely to lead to several years of traffic disruption. CBRE believe that the site is likely to be limited to a

specialist rail freight distribution facility (specialising in frozen produce distribution) and unlikely to compete with Trafford Park.

9.22 **Parkside, St Helens** – This is a former colliery site, to the east of St Helens and north of Warrington. The site covers an area of 107 hectares of which 50% is brownfield. Regional Economic policies for the area are to accommodate strategic distribution development, accommodate businesses that will utilise the railway for transportation and freight and create jobs for local people. CBRE believe the site will not have the appeal of Trafford Park and does not have the strategic links to the motorway to be able to compete with it.

Regional Employment Sites Summary

9.23 The Regional Employment Site case studies provide a useful perspective in helping to develop a vision and direction for Trafford Park. The profile of the sites discussed here need to be considered in the development of Trafford Park Vision and Spatial Framework. This is to primarily for the avoidance of duplication of other employment site offers and unnecessary competition and also to help identify gaps in the current regional offer. Although some of the regional sites are some way off completion, it would be the job of the NWDA to identify emerging issues and conflicts between sites.

9.24 It is felt that the areas with the greatest implications for Trafford Park are One Central Park in East Manchester and to a slightly lesser extent, Ashton Moss in Tameside. The strategic locations, relatively lower rents and strength of the B1 offer in these sites provide some competition to the development of Trafford Park. However, with its industrial core and manufacturing legacy, it's felt that Trafford Park will be able to position itself differently from neighbouring sites and serve a more diverse market than its competitors.

UK Case Studies

9.25 The following section gives a national context for the development of Trafford Park by identifying four other UK Business Park case studies. None of these are exactly comparable with Trafford Park although similarities and lessons learned from these case studies have been drawn out and have been applied in helping to develop the Vision for Trafford Park.

Aztec West, Bristol

Description & Background

9.26 Aztec West is the major out of town Business Park located within the Bristol environs, developed in the 1980's the park now extends to 155 Acres (62.7 Hectares), housing 100 companies and employing 7,000 people. The scheme was developed as a Research and Development location due to its good transport links and the quality of employees in the local market. The parks development was funded by the Electricity Supply Nominees on the half of the Electricity Supply Industry (ESI) pension fund.

Figure 9.1 - Location of Aztec West



9.27 The park is located approximately ten miles to the north of Bristol City Centre. Situated at the M4/M5 interchange, less than half a mile from Junction 16 of the M5 and a mile from Almondsbury Interchange on M4, connecting the site to the M32 leading to Bristol City Centre. The park is extremely well situated and highly accessible.

Current Use

9.28 As mentioned the Park was conceived to provide R&D accommodation based around industrial units, this accommodation along with some existing B8 space is aging and has been replaced with office accommodation, creating a different perception of the park, now much more office focussed.

9.29 The accommodation has traditionally been offered to either owner occupiers on a freehold basis or single occupiers on a leasehold basis taking single standalone buildings; however, there has over recent years, been a diversification with a move to multi let units in order to encouraging smaller occupiers to the area. Major occupiers on site include Orange, Logica CMG, Interroute Communications, WS Atkins, AXA Life, Aardman, Entec and the RAC Headquarters. The park offers a number of amenities including a four star hotel and a central retail area.

Moving Forward

9.30 There are a limited number of undeveloped plots remaining on the park and it is perceived that future development will come from the redevelopment and refurbishment of existing buildings. The park has in the main been developed on the basis of pre-let agreements during the 1990's, there have been a number of speculative developments that have been built over recent years. ROK development is currently developing a 100,000 sq ft office building which is pre-let for a term of 17 years to WS Atkins. This scheme represents the first redevelopment at Aztec West and is due for completion in early 2009.

Comparisons to Trafford Park

9.31 Aztec Park is located considerably further from the City Centre than that of Trafford Park (10 and 2 miles respectively) and like Trafford Park public transport links are generally poor - the 73 bus only operates with the park at peak times and the park has no direct rail links.

9.32 There is a move to redevelopment at both locations to provide modern office accommodation. Such developments in Bristol include ROK development of Aztec West and in Trafford Park, Peel Holdings and Property Alliance are in the process of developing new office accommodation. Like Trafford Park there is fractured ownership with a variety of institutional funds and private investors. Owners of aging industrial units are looking at redevelopment to higher values uses such as offices accommodation.

9.33 Aztec is one twelfth of the size of Trafford park accommodating only 100 businesses and 7,000 employees in comparison to Trafford Park which extends to 1,200 acres (485 hectares) housing 1,400 companies and 44,000 employees. The age and industrial heritage of Trafford Park is considerable in comparison to Aztec and redevelopment can be stifled in part by environmental issues and a requirement to redefine areas of the park.

Park Royal, London

Description and Background

9.34 Park Royal is a major industrial area located 4 miles north-west of central London, originally opened as a showground / exhibition site in 1903 by the Royal Agricultural Society for its annual show. However, this enterprise was short lived and in 1906, the society sold the site. With good road, rail and canal links, Park Royal was developed for industrial use, with considerable expansion mainly during the 1930's; for many years it was a centre of engineering.

9.35 The site extends to 1,729 acres (700 hectares). The industrial and business park falls within four London boroughs with approximately 50% of the estate within Ealing, 40% in Brent, and 10% in Hammersmith and Fulham.

Figure 9.2 - Location of Park Royal



9.36 Park Royal is located on three London underground lines (Bakerloo, Central and Piccadilly). The area has good road links benefiting from close proximity to the A406 North Circular and the A40 Western Avenue, leading to the national motorway network,

Current Use

9.37 In 2007 it was reported that 38% of the land was used for storage and distribution, 14% for Industrial, 5% for business and 8% by the motor trades. The building stock is good quality with more than half built in the last 25 years. Park Royal is home to a large number of medium-sized firms serving the Central London markets, however there are a number of large employers such as Mcvities, Heinz, Hazlewood Sandwiches and Katsouris Freshfoods, along with John Lewis and Macro. The park also houses the Headquarter buildings of Guinness and Carphone Warehouse.

9.38 The Park Royal area comprises a wide range of units and estates under multiple ownerships. Consequently, the Park Royal Partnership was set up in 1992 to coordinate economic regeneration in the area.

Moving Forward

9.39 Park Royal Partnership defines its objectives for the Park moving forward as the following;

- Protect and maintain Park Royal as the largest industrial employment location in London.
- Increase employment opportunities to meet the 11,000 jobs target through business growth.
- Improve transport infrastructure including public transport services and facilities.
- Improve the public realm and connect green spaces and other areas.
- Improve access to Park Royal at the 4 gateways and secure successful redevelopment of major sites.

- Deliver housing including affordable and ensuring a secure social infrastructure to support new and existing residents.

9.40 Plans for redevelopment are underway with the demolition of the old Guinness Brewery and sports ground site at the south-western extremity of the district. There have been suggestions for the development of tall buildings to enable regeneration of the Eastern Gateway.

Comparisons to Trafford Park

9.41 Like Trafford Park, Park Royal is located within close proximity to the major conurbation and central markets, sited approximately four miles to the north-west of London. Trafford Park is approximately two miles south west of Manchester city centre.

9.42 Both Parks tend to favour light industrial occupiers with larger distribution firms favouring alternative locations. The parks are home to a plethora of small, medium and large sized firms. Both industrial estates have a host of well known major occupiers and have the headquarters of prominent firms on site Guinness and Carphone Warehouse at Park Royal and Adidas at Trafford Park. Most importantly there are a wide range of units and estates under multiple ownerships, with the stakeholder Brixton present on both parks.

9.43 Like Trafford Park, Park Royal has sites available for development with the international drinks company Diageo owning the redevelopment site on which the former Guinness Brewery stood. At Trafford Park there are three significant sites available for redevelopment ; Brixton's site at Electric Park, St. Modwen's site to the rear of Adidas and Property Alliances Trafford Central Development on Ashburton Road West.

9.44 There are notable differences between the parks. Park Royal is served by a more comprehensive public transport system than Trafford Park with three underground lines (Bakerloo, Central and Piccadilly) within the immediate vicinity.

9.45 Park Royal Partnership is a single body which has brought together and consolidated the objectives of the four London boroughs that Park Royal falls within. This single structure has been successful in driving forward plans for development, transport systems and regeneration. The establishment of the Park Royal Partnership demonstrated an early appreciation for joined up thinking in order to compile a common marketing strategy that has been used to drive objectives forward.

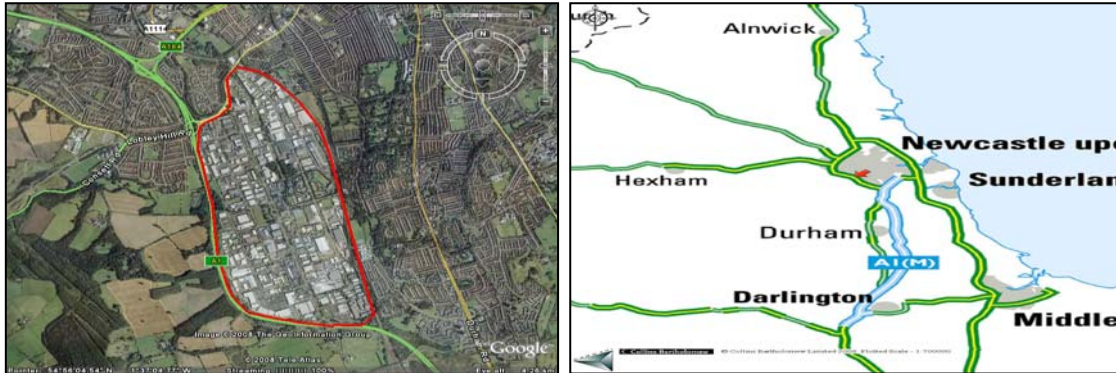
Team Valley Business Park, Gateshead

Description & Background

9.46 Team Valley was developed in the 1930s as a Government led initiative to tackle the problems of high unemployment in Newcastle and Gateshead. Team Valley was established

as a well planned industrial location; developed at the cost of £2m and developed over several years by Wimpy Construction the estate was completed in 1938. Team Valley Trading Estate is the conurbation's largest industrial estate now extending to 700 acres (283 Ha).

Figure 9.3 - Location of Team Valley



9.47 Team Valley Trading Estate is located adjacent to the A1 in Gateshead, Tyne and Wear. The main arterial route for the North East of England.

9.48 Team Valley benefits from good road links being bordered on the western edge of the estate by the A1(M), with access available by two junctions located at both the northern and southern ends of the park. A dual carriageway runs the length of the estate between the two A1 road junctions.

Current Use

9.49 Team Valley was a purpose built industrial estate. The design was a linear estate based upon a spine road known as Kingsway. The estate is regarded to be Newcastle's premier trading estate attracting and accommodating the major industrial occupiers in the North East Market. With 550,000 sq ft of industrial units having been developed since 1998, major occupiers on the estate include; Paradise Food Ltd, Pickfords, IPower Ltd and The Noble Organisation. English Partnerships view this location as a major economic location within the North east and have located their regional Headquarters there.

9.50 A retail area was established at the southern end of the estate in the 1980s, during "out of town" retail boom. The park is occupied by major retailers such as Next, Boots, Halfords, Currys, Comet and TK Maxx. At the southern end of the Estate, Morrisons have also developed a supermarket on the former National Coal Board's Regional Headquarter site following the decline of the Coal mining industry in the North East.

Comparisons to Trafford Park

9.51 Team Valley Estate is located two miles from the City Centre, on the periphery of the major city conurbation in the same way as Trafford Park although Trafford Park does have greater connectivity to the City due to the linear access to it.

9.52 They are both well serviced by the road network and located near good labour markets. However, both are poorly served by Public Transport. Team valley has no nearby rail linkages and an infrequent bus service. The 91 bus operates between Newcastle-Upon-Tyne and Gateshead, however this service only runs at peak hours.

9.53 Both estates are acknowledged as regional centre for industrial, warehousing and distribution services. However, with diversification of the parks there has over years been a move towards incorporating retail. Trafford Park has greater strength in this sector with the Trafford Centre being located on the park as opposed to The Metro Centre(the North East's equivalent to the Trafford Centre) being located 3.5 miles to the north-west of Team Valley Trading estate. The estate only offers a retail park style ('big box') shopping experience.

9.54 The central cores of the estates remain industrial, with the higher and diverse uses located on the extremity. The limited availability of larger sites and increasing property prices on Team Valley have led to industrial and distribution occupiers locating to Washington, within the former New Town employment areas. Trafford Park has seen a similar trend with distribution preferring other locations although 2007 saw a number of high profile distribution lettings occurring.

9.55 Due to planned nature of Team Valley and the evolutionary development of Trafford Park; Team Valley has stronger definition of sectors within the park with office accommodation was developed on the conception of the estate and therefore has a stronger base within the area; where as Trafford park has developed on a piecemeal basis.

International Case Studies

9.56 Within this piece of work one of the aims is to illustrate the opportunities that Trafford Park has to offer. The following two examples demonstrate global aspirations for modern development and the basis of the development success. These contrasting developments are both, in parts, applicable to Trafford Park.

One North, Singapore

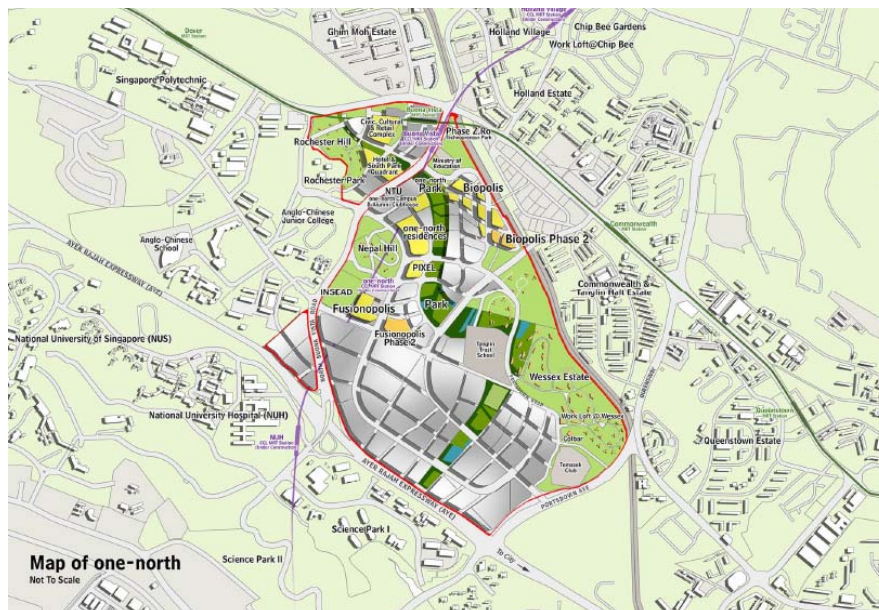
Description & Background

9.57 One-north is a Government led development under the control of the Jurong Town Corporation (JTC) its remit is to develop a planned Research / Development (R&D) and high technology estate to act as a global hub; driving these industries forward through the co-location of the major global leaders.

9.58 The development will take place on a 494 acre (200 Hectare) purpose built site in close proximity of downtown Singapore. The development was first conceptualised and set out in the National Technology Plan 1991 and was officially launched in 2001 by former Deputy Prime Minister Tony Tan Keng Yam.

9.59 The park will be phased over a 20 years period. Within the different areas of One North Phase 1 of the development is nearing an end with certain areas such as Fusionopolis embarking on Phase 2A of development.

Figure 9.4 - Plan of One North



Location

9.60 The site is situated in central Singapore within close proximity to the National University of Singapore (NUS), the National University Hospital (NUH) and Singapore Polytechnic and Holland Village. The site is extremely well served by public transport links with following either built or under construction on the site:

- A transport hub under development in the Vista Xchange area;

- The Buona Vista Mass Rapid Transit (MRT) station,
- A Circle Line (CCL) MRT station under construction that will link to Changi International Airport.
- A future bus interchange to provide access to Singapore's Central Business District,

Current Use

9.61 The Park is split into multiple areas with each accommodating a specific sector

9.62 **Biopolis**; is a purpose built biomedical R&D hub extending to 2m sq ft. Phase I of the Biopolis comprises a cluster of seven buildings which are linked by sky bridges. This area of the site will be home to more than 2,000 scientists, researchers, technicians and administrators.

9.63 **Fusionpolis**; extends across 30 hectares of land, located near Ayer Rajah Avenue. It is an area in which science meets business. Phase I was JTC's flagship development, a 120,000 sq m state of the art building. In addition to the corporate office space, numerous amenities have been developed including serviced apartments, amenity Clubhouse, a rooftop swimming pool and performance theatre with a 400 seats capacity.

9.64 **Vista Exchange**; this development covers 17 hectares offering a true mixed use development. Comprising high-rise office accommodation; a corporate hotel, retail and leisure centres and high quality residential developments. It is also a transport hub for one north.

9.65 **One North Park**; spans 16 hectares in land area and divided into 13 parcels of land. It forms a continuous and linear green spine to the park.

9.66 **Rochester Park**; Is one of the 3 preserved heritage sites in one-north. There are 11 units of bungalows which accommodate a variety of lifestyles such as themed restaurants with al-fresco dining.

9.67 **Wessex Estate**; is a colonial style residential estate comprising 26 walk-up apartment blocks and 58 semi-detached houses which spread across 28 hectares of land and is situated in the south-east corner of one north. Constructed around the 1940's, the Black and White walk-up apartments and semi-detached houses have now become home to a diverse community of artists.

Moving Forward

9.68 One North is aimed at a global market and to continue its growth is dependent on attracting major R&D occupiers as each phase completes. This product competing on a global stage faces considerable challenges, however, due to the offer and the location the Singaporean Government feel that they can offer a unique product to the market. The

development is designed to be a place where exceptional minds congregate to live, work, relax and learn.

LA Live, Los Angeles

Description & Background

9.69 LA Live is a mixed use development, based on the success of the Staples Centre, aimed at creating a downtown Los Angeles sports and entertainment destination.

9.70 Downtown Los Angeles for many years had an insufficient offering of leisure and food retailing amenities to service the CBD of the city. The area was vibrant during the 'working day', however, with few amenities this area became under utilised in the evenings. The turning point for the area was the development of the Staples Centre, which not only brought with it a sporting venue and conference centre but an anchor for leisure and food offering that acted as a catalyst for the surrounding areas; maintaining vibrancy to the locality long after the 'work crowd' had finished for the day.

9.71 AEG (Anschutz Entertainment Group) are in the process of developing 5.6m sq ft of mixed leisure (LA Live) next to the Staples Centre and the Los Angeles Convention Centre in order to capitalise on the burgeoning demand in the area. The development will offer a multi-faceted entertainment destination; including a mix of entertainment venues, restaurants, hotels, retail, commercial, residential along with television / broadcast studios and concert arenas.

Location

9.72 The site is located to the south of Los Angeles Central Business District benefiting from good transport linkage to the 110N and 105E freeways which connect to Los Angeles International Airport. There are additional road links that connect to the San Fernando Valley, San Diego and Thousand Oaks in Simi Valley. The site also benefits from close proximity to the public transport network with both Metro Rail and Metro Bus stops near to the Nokia Theatre.

Figure 9.5 - Plan of LA Live



Current Use

9.73 Phase I of the development opened in October 2007, comprising the Nokia Theatre (venue seating 7,100) and Nokia Plaza. Grand Opening of the Grammy Museum in the first week of December 2008.

Moving Forward

9.74 The scheme has been phased with numerous developments set to take place over the coming years. Phase II is scheduled to commence in late 2008.

9.75 Major Occupiers of Phase II with pre-lets already in place include Starbucks, Lawry's Carvery, Flemings, The Farm, Regal Cinemas, Lucky Strike Lanes (bowling alley), The Conga Room (venue holding 1,100 patrons for Latin-American dancing events). These operators along with ESPN and AEG Broadcasting Studio and corporate office space are all set to open in 2009.

9.76 Phase III will be completed in 2010 with the scheduled opening two major hotels; JW Marriott (878 Guest Rooms) with ballrooms and meeting rooms and the five star Ritz-Carlton (123 rooms). The Ritz-Carlton seeks to attract headline acts and sporting teams as well as executives visiting downtown LA and LA Live on business.

Comparisons of both One North and LA Live to the Trafford Park Area (including Salford Quays)

9.77 Peel Holdings are aiming to create a global location to compete with One North within the ICT market whilst being anchored by Media industry in the same manner as that of LA Live. The development of the 200 acres site which will incorporate the following:

9.78 A global destination location offering a broad diversity of uses including Leisure, Retail, Office, Residential and Studio accommodation.

9.79 Mediacity:UK, within the Salford Quays, will provide 41,806 sq m (450,000 sq ft) of office and studio accommodation for the British Broadcasting Company (BBC). In addition to the BBC it is widely expected that Granada (ITV) will be relocating to Trafford Park linked to Media City by a pedestrian bridge across the canal, although this has not yet been confirmed.

9.80 Like LA Live, Peel are developing two hotels as part of the 200 acre development. These hotels will not only serve Mediacity:UK but also the surrounding area.

9.81 Salford Quays although a mixed use location has never capitalised on the 24/7 offering with residents leaving the area to work during the day returning at night and employees entering the area in the day and leaving at night. The area has never found an anchor or successful offering of leisure and restaurant provision to ensure that the area maintains the interest of the work force and attracts new residents to it. This is very similar to the difficulties that were faced in down town Los Angeles prior to the Staples Centre / LA Live regeneration.

9.82 LA Live was anchored by the development of the Staples centre to act as a major sporting venue, housing two basket ball teams the LA Lakers and the Clippers along with the Kings Ice Hockey Team. Trafford Park already benefits from the worlds most famous football club (Manchester United) and it is in close proximity to Lancashire County Cricket Club another globally recognised sporting venue.

Lessons from International Case Studies

One North

9.83 Is served by an outstanding Public transport network, demonstrating the importance and demand from occupiers to be able to easily access such an integrated system.

9.84 The development is divided into individual elements which serve a specific purpose including Residential, science technology, science and business, retail and leisure; setting a global precedent as to the way in which the integration of uses should be designed.

9.85 Large areas of open space and recreational areas, promoting tailoring living for a variety of lifestyles.

LA Live

9.86 Capitalises on the creation of conferencing and leisure facilities supported by hotels in order to create a high profile location that has developed a critical mass which will result in the sustainability of the area.

9.87 The area also benefits from substantial car parking provision - which is not favoured currently with potential implementation of congestion charging, but having examined the success of the Trafford Centre indicators would suggest that a substantial part of the success is based on ease of access which is car based.

9.88 LA Live has successfully utilised the success of a sporting venue to house three teams and act as a major draw to the area. Unfortunately, British sporting culture is not as flexible and it is unlikely that a stadium could be used in the same manner as this but alternative uses should be sought apart from that of simple conferencing.

Conclusions

9.89 The case studies provide a useful context in which to develop themes and approaches for the Trafford Park vision, including regional, national and international practice.

9.90 The regional case studies highlight the degree of competition, although a number of the Regional Sites are some way from development. With regard to Trafford Park, the key conclusion are:

9.91 A number of locations offer a high quality environment for research and development and knowledge based international inward investors. These are very competitive and offer a more attractive physical environment at this time compared to Trafford Park.

9.92 A number of sites seeking to attract light industrial, storage and distribution; Trafford Park is at least as competitive as these locations, and its proximity to the Regional Centre and motorway network at the heart of the conurbation gives it some advantages.

9.93 Regionally, Trafford Park remains competitive for a number of sectors, although attracting inward investment for certain types of end users will be challenging. The prioritisation given to certain locations by the NWDA for certain types of uses will make it difficult for Trafford Park to compete in parts of the inward investment market.

9.94 The national case studies provide examples of Industrial Estates which have a history not dissimilar to Trafford Park, with many now facing similar challenges of declining industrial employment and a shift to higher value uses such as office and retail. The key features of case studies relevant to Trafford Park are:

- Development of a joined up marketing and regeneration approach (such as the Park Royal Partnership example) will enable the modernising of industrial offering to take place in the medium term and lead to greater innovation within the park as a whole as the industrial core contracts.

- Such actions in multi ownership estates must be supported by quantitative targets such as the setting of employment figures and co-ordinated actions across a number of public sector agencies
- Trafford Park like other UK industrial estates suffer from a lack of good quality public transport (Team Valley / Aztec West)

9.95 To address the points raised above would enable Trafford Park to take the lead and develop further than other estates especially based on the changing face of the surrounding area with the development of Media City, which from Trafford Parks future development must be capitalised on.

9.96 The international case studies are very distinctive and benefit from being more modern and purpose built for the knowledge economy. There are two features which are relevant to Trafford Park:

- Utilisation of the existing sports or cultural venue must be examined in order to create and sustain a destination location such as that LA Live. LA Live has developed very strong branding, with a concentration of knowledge / media based tenants giving it an international focus
- The comprehensively planned approach of One North demonstrates the need for iconic, well branded products with excellent transport infrastructure to be developed in order to develop global appeal.

9.97 These examples provide number of ideas which are very relevant to Trafford Park, including both the modernisation of older locations and increased marketing and development efforts for both traditional and new sectors.

10 BUSINESS SURVEY

Introduction

10.1 This chapter sets out the details of a survey which was circulated to local businesses within Trafford Park, and the responses garnered.

Methodology

10.2 The content of the survey was developed in conjunction with the client to ensure that it would cover all areas needed to inform the development of the Masterplan baseline report. The survey was divided into four sections: an overview of the company's performance; existing and future market demand analysis; skills and business needs analysis; and the company's views on Trafford Park.

10.3 A commercial database procured by Trafford MBC (Hoovers) was used as the basis for circulating the survey: this identified 941 businesses within Trafford Park. A survey was issued to each of these businesses, accompanied by a covering letter from Trafford MBC and an SAE for returning completed surveys. In addition the covering letter gave the URL of a website where the survey could be completed online; this weblink was also advertised on Trafford MBC's website, along with a short editorial about the Masterplan. A 3-week window was given for completion of the survey: a reminder email was sent 10 days prior to the closing deadline to those businesses on the Hoovers database which had email addresses that had not already responded.

10.4 Of the 941 companies that were contacted 120 responses were received, providing a response rate of 12.8%. Of this 12.8% almost all (12.5%) responded via post

Business Details

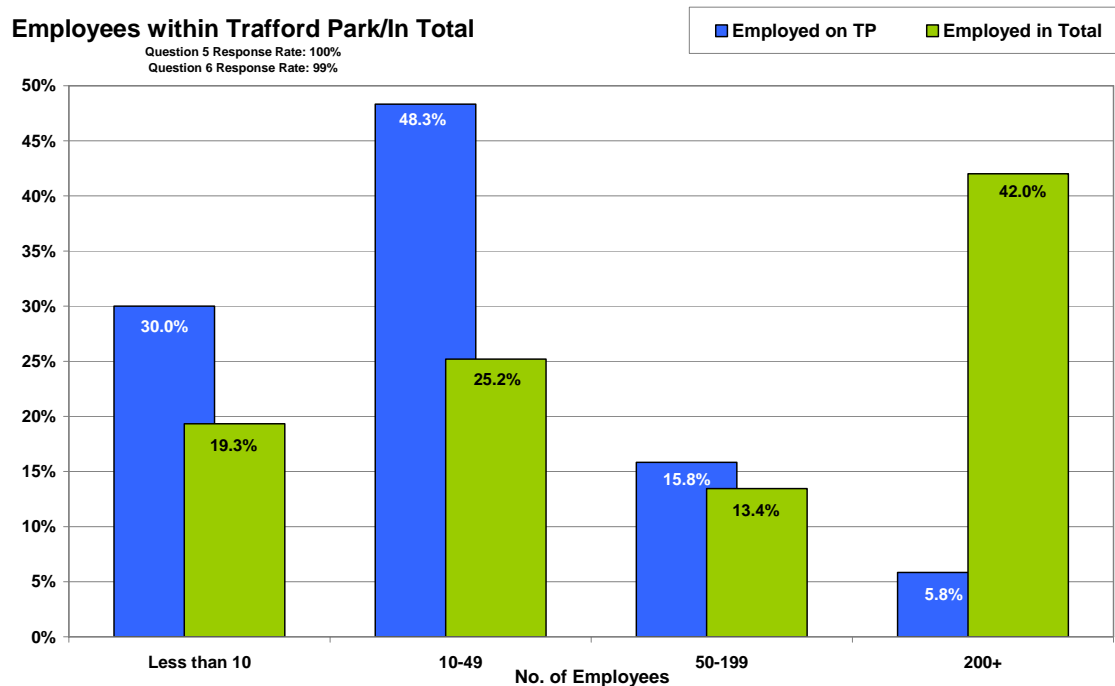
10.5 33.6% of respondents stated that theirs was the sole business premises; and 30% stated that they were part of a wider company with 10 or more additional offices or business units. Of the businesses which were part of a wider company, only 15.8% named their Trafford Park base as the headquarters (HQ). It could be concluded therefore that Trafford Park at present is not seen as an 'HQ' location, possibly due to image, quality of property or location.

10.6 When asked how long their business had been located at Trafford Park 55% stated that they had been present for over 10 years, with the longest-established having been on the Park for 128 years (the average duration of presence on the Park was 27 years). Only 0.8% of businesses had been located at Trafford Park for less than a year; 19.2% had been there

for 1-5 years; and 25% had been located on the Park 5-10 years. These results indicate a large percentage of established businesses within Trafford Park.

10.7 The chart below details the number of employees employed within the businesses in Trafford Park in comparison with the amount employed by the companies overall. The most common response for numbers employed on Trafford Park was 10-49 employees (48.8% of respondents), followed by 1-10 employees (30%); for employees in total the most response was for 200+ employees (42%), which also generally correlated with those businesses who had previously stated they had 10 or more offices. The conclusion drawn is that in general the larger employers tend to be those which have a number of operational sites, of which Trafford Park is one businesses; businesses which have Trafford Park as their HQ or sole business base tend to be smaller, employing less than 50 people.

Figure 10.1

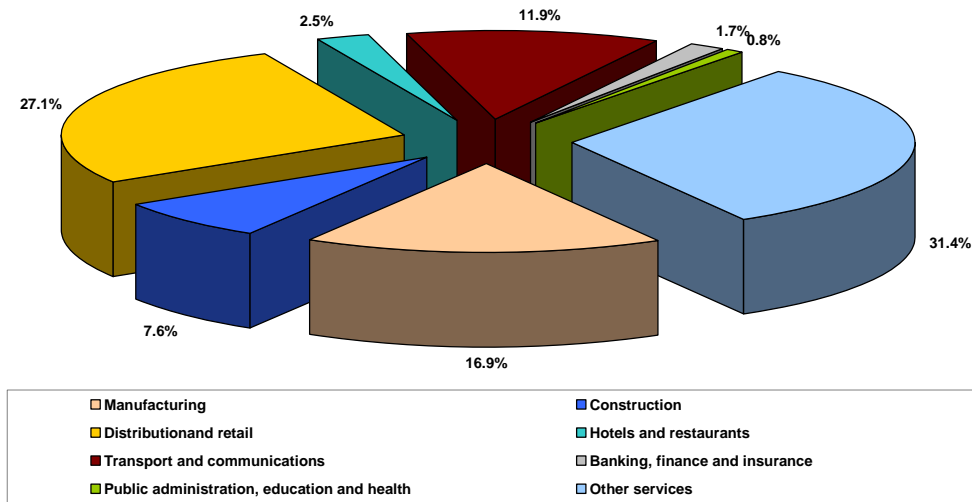


10.8 Aside from 'Other Services', the sectors that garnered the highest proportion of responses were distribution and retail (27.1%), manufacturing (16.9%) and transport and communications (11.9%). This underpins Trafford Park's role as largely still being that of a traditional industrial estate.

Figure 10.2

Which of the following best describes the sector of your business?

Question 7 Response Rate: 98.3%



10.9 Although the largest proportion response of 'Other Services' this is most likely due to respondents feeling that the options presented were not specific enough to describe their business, as when describing their business activity in the freetext box provided many responded with a description that could have been covered by the options given.

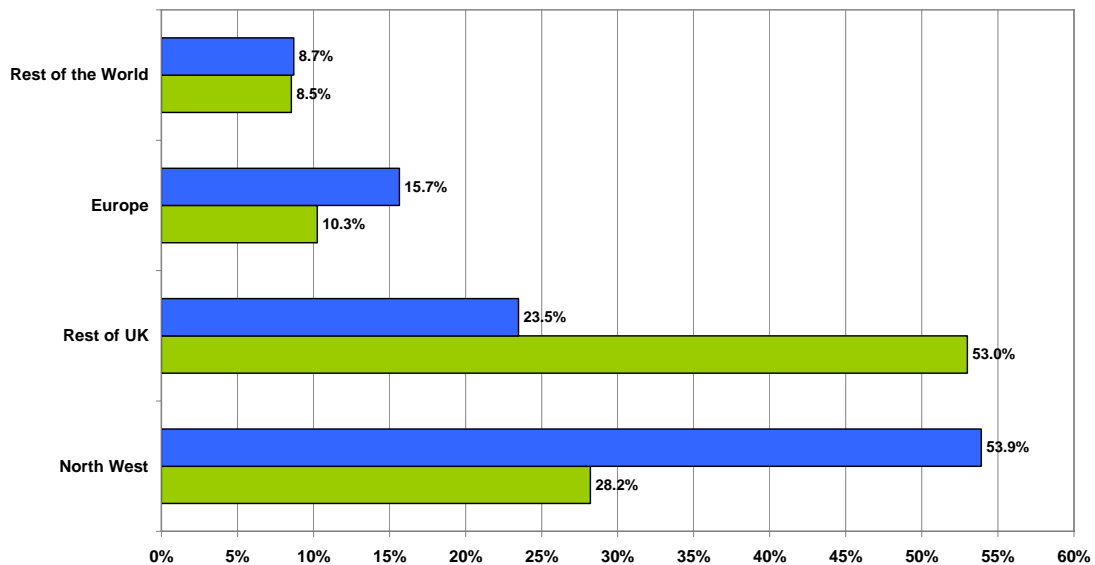
10.10 The chart below sets out the responses when the businesses were asked about the location of their parent company and their company's end product:-

Figure 10.3

Company and End Product Location

Question 1 Response Rate: 95.8%
Question 11 Response Rate: 97.5%

Location of Parent Company
Location of Company's End Product



10.11 Of the companies surveyed, 53.9% claimed that their parent company was based in the North West; 24.4% of the companies described themselves as non UK owned. There are a high percentage of businesses whose end product is aimed at the rest of the UK (53%), 10.3% who focus their end product on Europe and 8.5% who ship to the rest of the world. This indicates that the companies based on Trafford Park are a varied mixture of nationally, internationally and globally focussed businesses.

10.12 In line with the previous response, 61.2% of companies said that their main competitor was located elsewhere in the UK, and 31.9% said elsewhere in the North West. Elsewhere in Greater Manchester accounted for 26.7% of responses and 24.1% stated Trafford Park as the location of their main competitors. The lower proportions were for Europe (12.9%) and the rest of the world (15.5%).

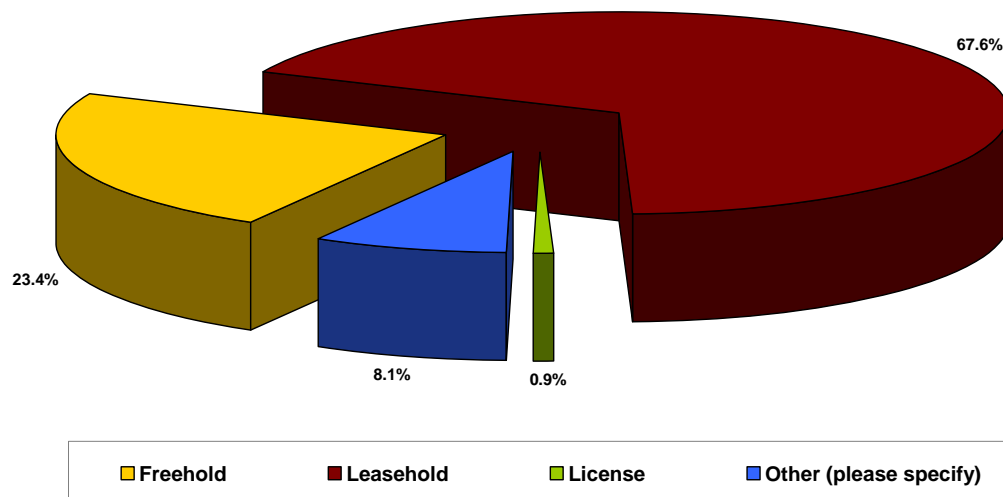
Property

10.13 The type of tenure businesses have is set out below.

Figure 10.4

Current Property Tenure

Question 14 Response Rate: 92.5%



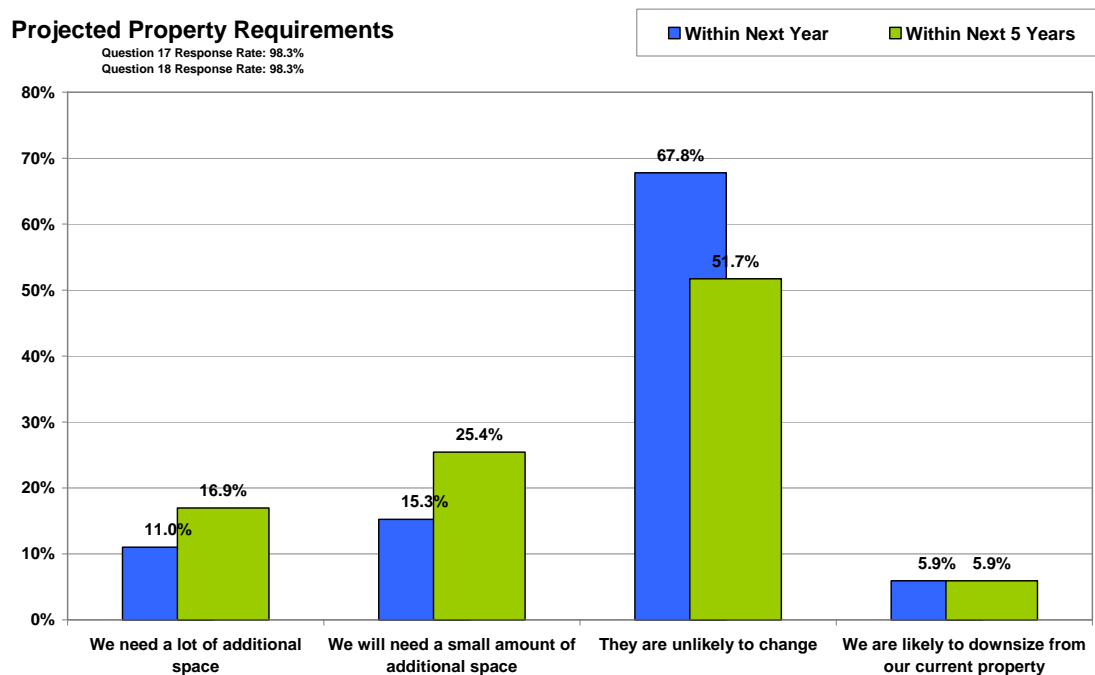
10.14 As can be seen 67.6% of respondents described their current property tenure as leasehold: this is significant and underpins the need to ensure that not just parties who have land and property ownership interests in the Park are involved in the development of the Masterplan and other potential future activities on the Park.

10.15 When asked of their current levels of satisfaction with their business premises on Trafford Park 90.6% said they were satisfied (of which 37.6% were very satisfied). 9.4% stated that they were dissatisfied, with 2.6% expressing high levels of dissatisfaction.

10.16 Companies were asked whether they had any particular issues with their current business premises, generic responses which occurred most frequently related to the proposed congestion charging, parking issues and security within the Park in descending order. Responses which were company-specific related to premises size (too small).

10.17 Over 67% of the companies surveyed stated that they believed that they would not need different premises within the next 12 months, dropping to 51.7% over the next 5 years. The majority of responses indicate that additional space will be required over the next 1 to 5 years; only 5.9% of respondents said that they were likely to downsize from their current property. These results are illustrated in the chart below:-

Figure 10.5



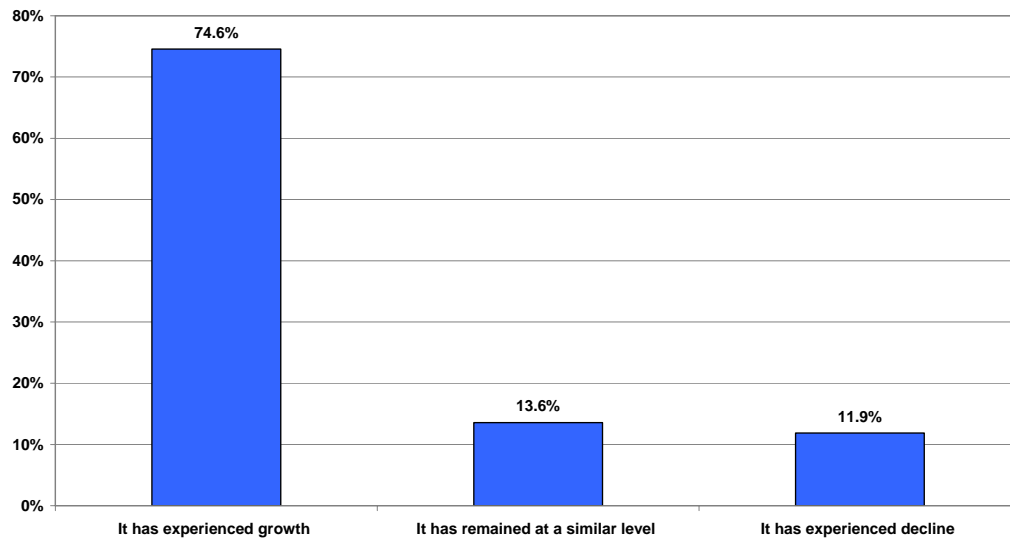
Business Performance on the Park

10.18 Almost 75% of businesses that replied to the survey stated that their company had experienced growth over the past 5 years, 13.6% had remained at a similar level and 11.9% stated that they had experienced a decline:-

Figure 10.6

Company Growth Over the Past 5 Years

Question 9 Response Rate: 98.3%



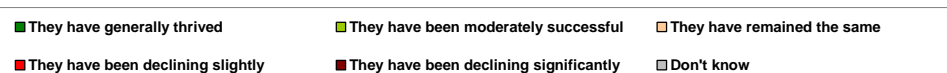
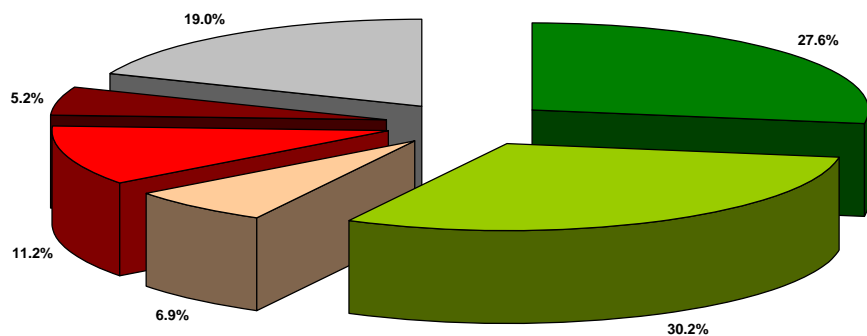
10.19 61.9% of all businesses felt that their businesses would continue to grow, with 17.8% of these anticipating 'significant' growth. 5.9% felt that their business would decline, with 2.5% believing that this decline would be significant. Just over one-fifth (22%) of respondents expected their businesses would remain at a similar level over the next 5 years.

10.20 The chart below sets out the responses when asked for views on the performance of businesses in general on Trafford Park. Over half the respondents replied that they believe that they have seen moderate to high levels of success. 16.4% stated that they believe that there has been slight to significant decline.

Figure 10.7

Performance of Businesses on Trafford Park

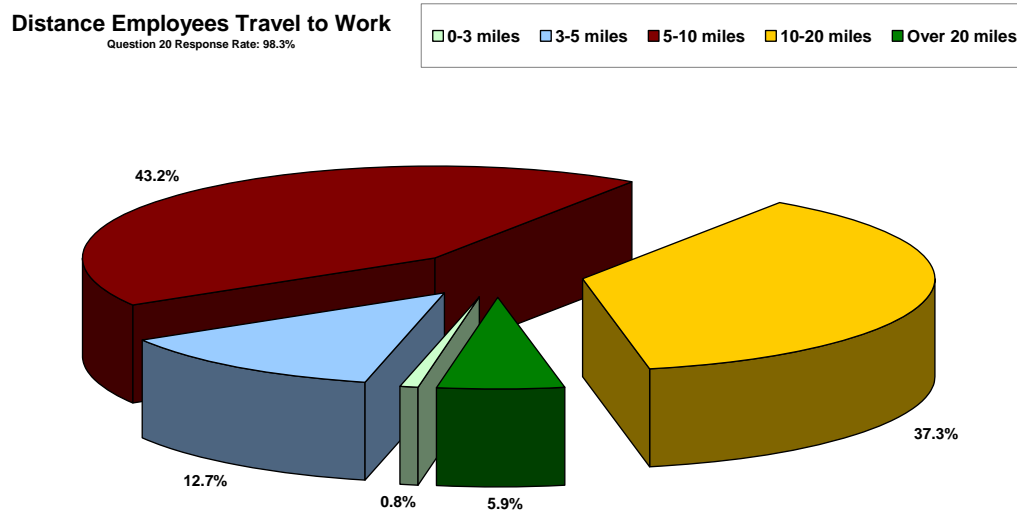
Question 42 Response Rate: 96.7%



Transport and Access

10.21 The companies were asked how far, on average, their employees travelled to work. The chart below illustrates that the majority of the responses fell between distances of 5-20 miles, although 5.9% of respondents said that employees travelled over 20 miles to work.

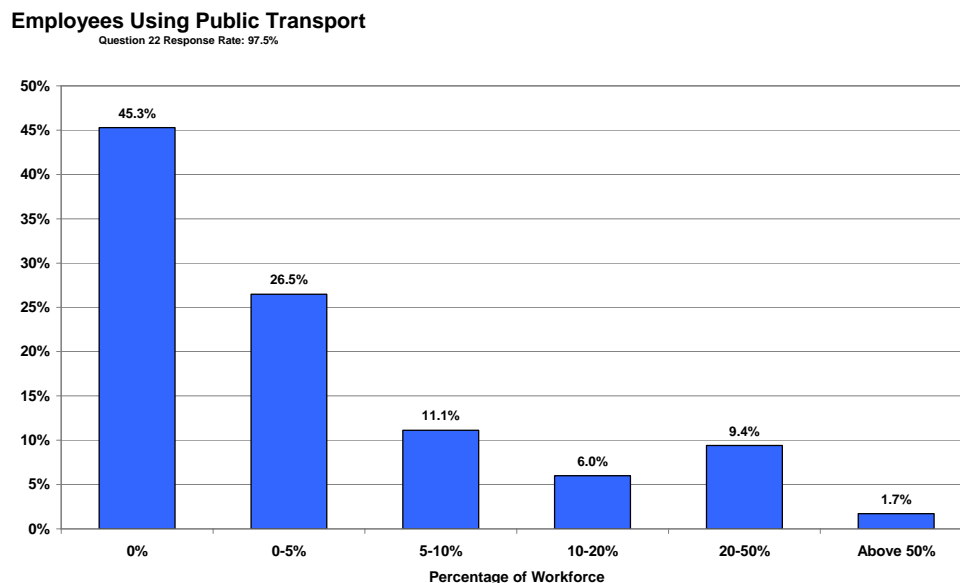
Figure 10.8



10.22 An overwhelming majority of the businesses (94.1%) stated that the most common mode of transport to work amongst their employees was by car. A very small proportion used public transport (less than 6% combined).

10.23 When asked specifically what percentage of their workforce uses public transport, 45.3% of respondents said that none of their workforce make use of public transport:-

Figure 10.9



10.24 When asked what percentage of their workforce cycled or walked to work almost half (48.3%) said none, 33.6% said 0-5% of their workforce, 10.3% said 5-10% of their employees and only 7.8% said that over 10% of their workforce.

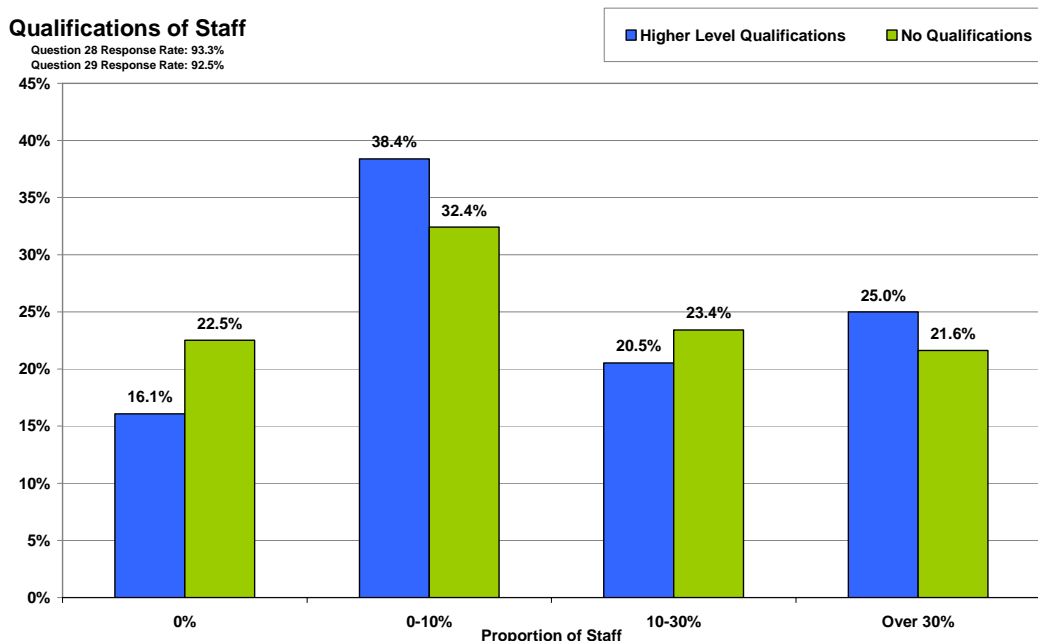
Skills and Business Needs

10.25 Both availability of staff with skills (46.1%) and skills and training of staff (45.1%) came the highest in a list of needs which were deemed to be most important to the companies surveyed. Availability of staff was the third most important need with 25.5%, followed by facilities and amenities for employees (18.6% and financial, access to finance and cash flow (17.6%). Property was ranked as the least pressing need with 13.7%.

10.26 91.3% of respondents stated that they were pleased with the size and skills of their current workforce, with 37.9% of these said they were very pleased. Only 8.6% said that they were dissatisfied. 50.4% of the respondents saw that the current availability of the right quality and quantity of staff as a problem to their business, with 17.4% saying this was a major issue; however, 32.2% felt it was not an issue. 11% stated that they currently had major skills issues amongst their staff, with problems such as “poor basic school literacy and communication”, “not enough trained technicians” and “communication and personal skills of younger people” being cited.

10.27 The chart below sets out levels of qualifications within respondent businesses. A quarter stated that over 30% of their employees had higher level qualifications (25%), yet almost as many businesses (21.6%) said that over 30% of employees had no qualifications (21.6%) - illustrating the wide disparity that currently exists in skills levels on the Park.

Figure 10.10

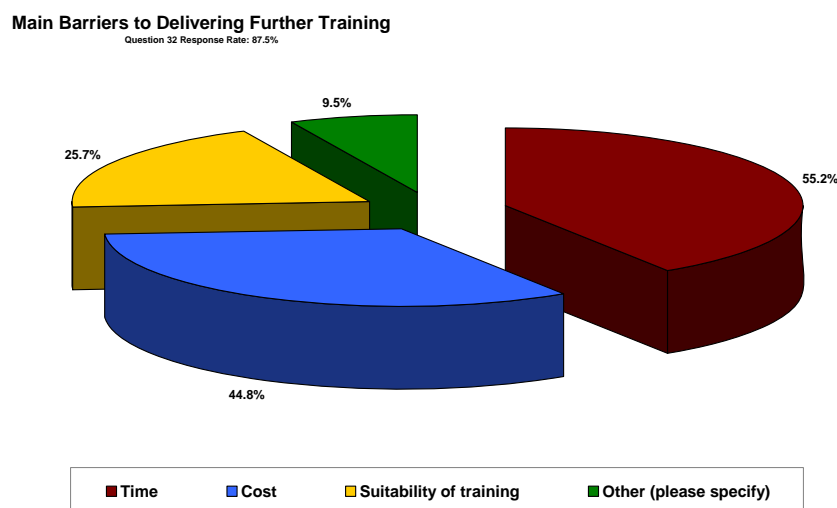


10.28 Training levels for employees in Trafford Park generally appear to be quite high, with 36.4% of all businesses stating that they provided recognised internal & external training. Internal training was more popular where it was provided for all staff, rather than just some staff. Only 4.2% of respondents said they provided no training for their staff.

10.29 When asked if they would like to deliver further training to their staff, half stated that they were happy with the current level of training provided; of those who would like to provide more training 19.5% said that they would like to provide more for all staff, 30.5% said that they would but only for some staff.

10.30 Respondents felt that the main barriers to delivering further training were time (55.2%) and cost (44.8%):-

Figure 10.11



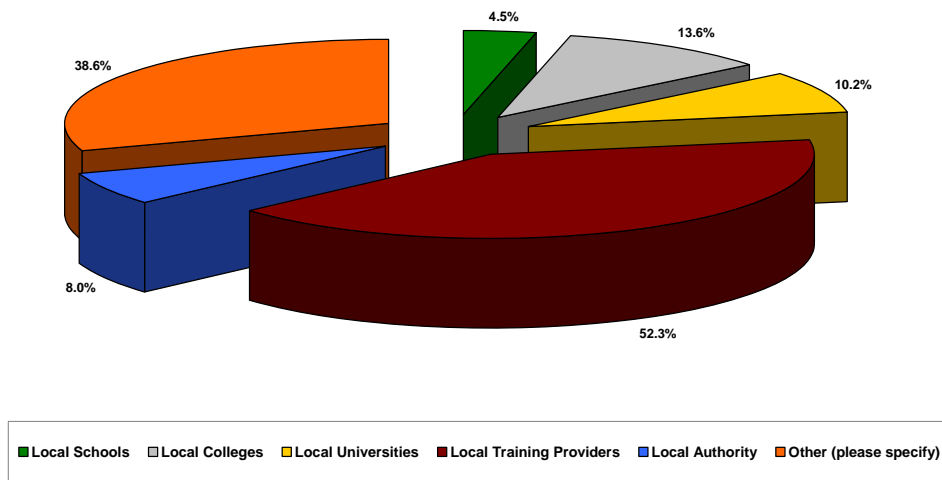
10.31 Looking forward, we asked whether the businesses felt that their skill requirements were likely to change in the future. Over half felt that their requirements would remain the same; 44% thought that they would need more skilled staff and 2.6% predicted that they would require less skilled staff.

10.32 Considering the possible need for assistance with skills issues, we asked who the companies worked with in regard to any skills issues that they may have. Over 50% said that local training providers helped them with skills issues, and 38.6% marked 'other'. In response to this many companies listed that they mostly used their internal company training programmes and in-house training:-

Figure 10.12

Training Provision with Regards to Skills Issues

Question 34 Response Rate: 73.3%



Business Engagement

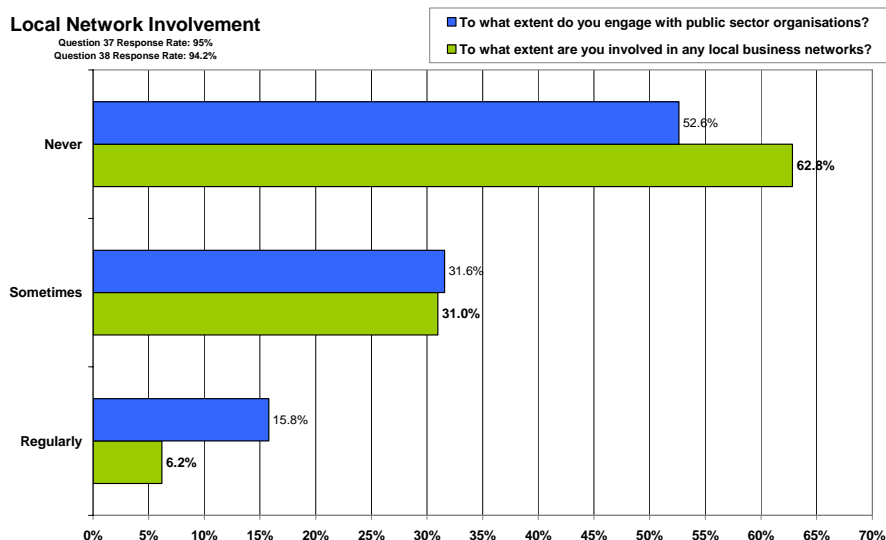
10.33 56.8% of respondents stated that they did a small amount collaborative working with other Trafford Park businesses, with 11.9% stating that they did a significant amount. However, over 30% said that they did not work with any other Trafford Park business.

10.34 When asked about their level of involvement with public sector organisations and local business networks over half stated they didn't work with either; a third said that they sometimes worked with either. 15.8% of respondents said that they worked with public sector organisations on a regular basis, and 6.2% with local business networks:-

Figure 10.13

Local Network Involvement

Question 37 Response Rate: 95%
Question 38 Response Rate: 94.2%

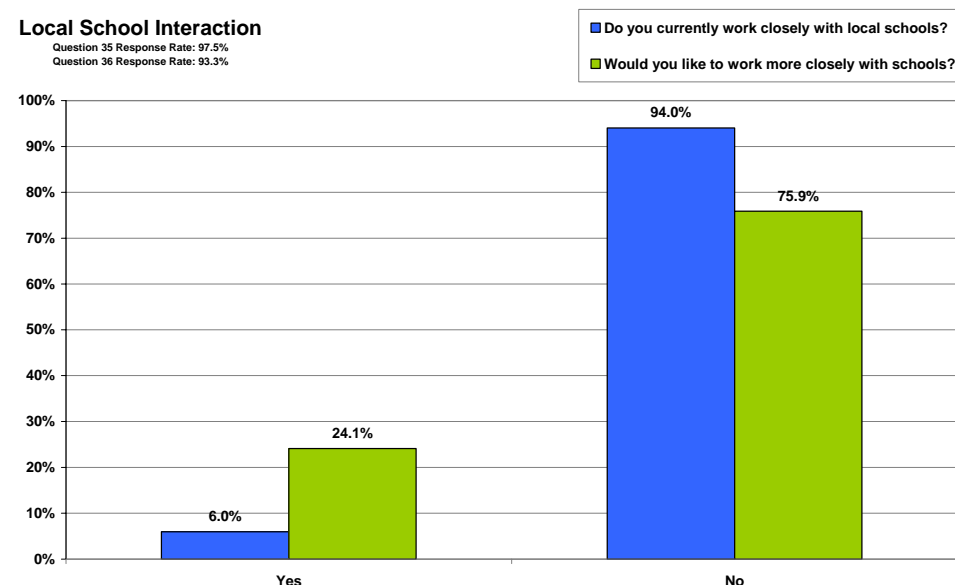


10.35 Potential for increasing the involvement of Trafford Park businesses with other businesses and partners on the Park exists as 59.1% said they were 'maybe' interested and 24.3% said 'yes'. 16.5% of respondents said that they would not be interested.

10.36 To better understand the current business links between companies based on Trafford Park and the development of the future workforce, we asked whether the companies currently worked with local schools in the area. A small proportion stated that they did (6%) through work experience and placements, although the majority (94%) said that they did not.

10.37 Over three-quarters of respondents who did not currently work with local schools are happy to continue this way; however, almost a quarter of companies have said that they would be interested in respect for work experience, placements, sponsorships and career days.

Figure 10.14



10.38 When asked how the companies felt that the public sector could work more closely and effectively with the Trafford Park business community, some suggestions were:

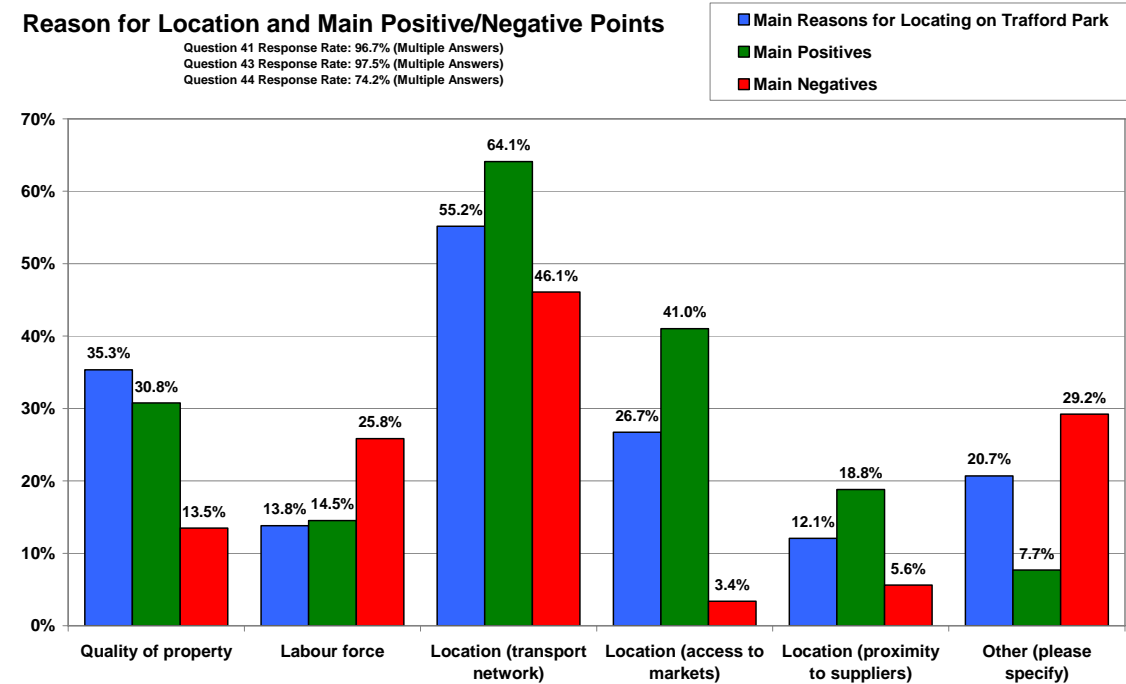
- “More advertising/awareness (newsletter?)”
- “Give a clear understanding of what is available and from whom”
- “Re-establishment of the Trafford Park Business Forum – or similar”
- “Improve security and introduce public transport”

Views on Trafford Park

10.39 When asked for their main reason for locating on Trafford Park, the most popular response at 55.2% was transport network. This was also highlighted as the main positive

aspect of being located at Trafford Park (64.1%) and the main negative aspect (46.1%). The next two most popular incentives for locating on Trafford Park were the quality of property (35.3%) and the access to markets (26.7%):-

Figure 10.15



10.40 Other reasons which ranked highly as positive points about locating in Trafford Park were the access to markets (41%) and the quality of property (30.8%). The next two highest negative points were listed as 'other' (29.2%) and labour force (25.8%). When further detailing their 'other' negative choice, businesses have mainly given their reason as both the proposed congestion charge and poor public transport.

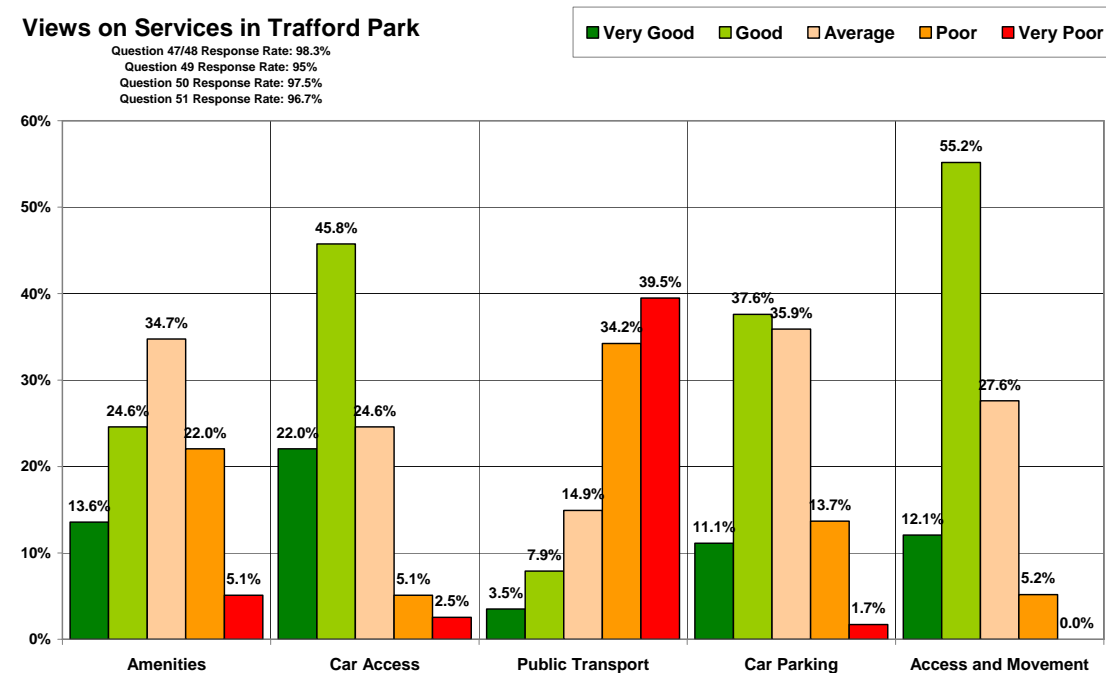
10.41 Other locations that were considered as an alternative location to Trafford Park are listed in the following table:

Table 10.1 - Alternate Locations to Trafford Park

| Southampton | Bredbury | Salford | Warrington | Irlam | Stockport |
|--------------|------------|------------|------------|-----------|------------|
| Liverpool | London | Germany | Chadderton | Ireland | Sale |
| Metro Centre | Meadowhall | Altrincham | Irlam | Stretford | White Rose |

10.42 The chart below illustrates the general opinion of amenities, car access, public transport, car parking and access and movement within Trafford Park by the companies who are based there. Overall, access and movement are considered 'good' with 55.2%, as was car access with 45.8%. 37.6% felt car parking was 'good', and 35.9% felt it was 'average'. 39.5% thought public transport was 'very poor', with a further 34.2% feeling it to be 'poor':-

Figure 10.16



10.43 When asked to what extent the quality/lack of quality of transport and public transport connections to Trafford Park impacted upon respondents' ability to retain or attract staff, 57.1% of businesses said that it had a negative impact, with 24.1% stating it had a major negative impact. Just over 38% said that they felt it had no impact overall. These findings should be caveated with the fact the survey was issued to businesses in both the industrial areas of the Park and the Trafford Centre, the latter of which has regular bus services for shoppers and employees, whilst the former has far fewer.

10.44 Over half (55.5%) of the companies surveyed said that they had recently taken steps to improve energy efficiency and/or introduce renewable energy. When asked, the majority claimed to have never experienced any issues relating to utilities infrastructure on the Park, although a few respondents did mention problems that they have had with cost of utilities and broadband function.

10.45 The companies were asked what lessons they felt could be learnt for Trafford Park from other business parks. Some suggestions were:

- "Don't mix industrial with large retail (Trafford Centre)"

- “Increase public transport provision”
- “Reduce rates and offer incentives and support”
- “Vital to have good access to the M60 and motorway system in general”
- “Security cameras and a business park ‘caretaker’ who patrols”

10.46 In conclusion we asked whether the businesses had any other views/issues that they would like to raise in relation to Trafford Park; 37.7% of all responses voiced concerns over the congestion charging which is proposed for Trafford Park. Additional concerns were the current service level of public transport and the loss of the post office in the village.

10.47 Of the 120 companies who responded to our survey, 52 (54.2%) responded stating that they would be happy for us to contact them again regarding the Trafford Park Masterplan.

Business Survey - Key Conclusions and Implications

10.48 This business survey reflects the views of 120 business on the Park which is approximately just less than 10% of all businesses on the Park. The key issues raised through this process can be summarised as follows:

- There is a large proportion of non UK owned businesses on Trafford Park (24.4%)
- There are lots of established business in the Park; 55% have been based there for over 10 years
- There have been relatively positive views with regards to performance and growth of businesses from the surveyed companies
- There is little or no collaborative working between the companies but there is some desire to do more
- Staff skills issues are important to the businesses
- Public transport links are seen as lacking within the Park and are considered important
- There has been a decent level of involvement from the businesses in Trafford Park who have given permission to contact them again

10.49 The Trafford Park Business Survey has been useful in understanding the views over 100 businesses with regards to their views on Trafford Park and key business needs/requirements. Over half of these businesses would like to be contacted again regarding the Masterplan, showing willingness to assist with developing future plans for the Park. It will be important to continue to engage with businesses on the Park throughout the development of the Masterplan.

11 Consultation with Key Stakeholders

Introduction

11.1 As part of the baseline study the Study Team have undertaken a number of key stakeholder consultations. It is intended that this consultation process will be continued through the Visioning stages of the commission, but for the purposes of the baseline stage the Study Team have targeted major landowners including institutional investors; property companies; and owner-occupiers (local businesses).

11.2 The aspiration from the consultation process was to:-

- Assess current perceptions of Trafford Park;
- Gain a greater understanding of the strengths and weaknesses faced by the Park's various owners and occupiers and what steps could be made to improve the built environment; and
- Assess their vision of how the Park will change over the next 10-20 years.

11.3 Consultations are ongoing, but those consulted so far include:-

- Manchester Enterprises
- Learning Skills Council
- Job Centre Plus
- Peel Holdings
- Brixton
- Manchester United Football Club Plc
- Cargills
- Howard Holdings
- Prudential Property Investment Management
- Morley Funding Management
- Legal and General Investment Management
- CBRE Investors
- Royal London
- Threadneedle
- ING
- Property Alliance Group
- MIDAS
- GMPTE
- Highways Agency

11.4 This section of the report sets out a summary of the key findings from these consultations.

Physical and Functional Aspects of Trafford Park

11.5 Although recognising the political nature of the issue, there was a strong view that the debate over the implications of the congestion charge on Trafford Park has important implications for the Park and should be discussed in the Masterplan. Views on the issue varied. The introduction of the congestion charge and investment in public transport could potentially increase the current Trafford Park labour market by a huge extent. It could also mean that companies start recruiting a more localised labour market. However the extent of concern caused regarding the principle of congestion charging on Trafford Park is clearly illustrated in the responses to the business survey.

11.6 Road congestion is not currently an issue around the industrial areas of Trafford Park, but staggered hours were traditionally used to alleviate congestion at peak times although some companies still operate with their original time slots allocated by the local authority. Congestion does occur around the Trafford Centre and MUFC stadium, particularly on match days. Consultees have indicated that support would be given to any public transport or access improvements in the area which would help to alleviate these issues.

11.7 The Park's proximity to Manchester Airport has been a key driver in the development of the Park. Many companies generate a lot of traffic between Manchester and Europe for this reason.

11.8 There is a view that there has been little capitalisation on Trafford Park's proximity to Media City. It is felt that the area close to the MUFC stadium and the Quays in the eastern edge of Trafford Park are likely areas for an increased leisure and tourism focus in the future. Public realm improvements around MUFC stadium as well as the proposed pedestrianisation of Sir Matt Busby Way will help to encourage visitor numbers.

Congestion Charging

11.9 Investors, developers and occupiers alike have serious concerns as to the impact that congestion charging will have upon the economic development and prosperity of Trafford Park, within its current guise, moving forward. The general opinion is that such a scheme has the potential to significantly stifle the development of Trafford Park rather than benefiting it - especially based upon the issues surrounding Public Transport (as set out below).

11.10 Some of the focal points identified by the stakeholders with regard to the congestion charge on the development of Trafford Park are as follows:-

- **Marketability** - Investors have concerns as to the impact such a charge will have upon their ability to attract tenants to their properties. Occupiers will need to re-assess all the variables including location, staffing levels and most importantly operational costs. Distribution operations could well become the most disadvantaged by such a proposal, as they are likely to have the greatest number of commercial vehicles entering and leaving the congestion charge zone on a daily basis.
- **Retention** - the same variables outlined above are pertinent to retaining occupiers. It could be argued that with the continued escalation of fuel costs, inflation and raw materials already making occupation more expensive the potential of a further cost in relation to congestion charging may be one step too far. Staff retention as a result may become more challenging if as expected the workforce is expected to pay the charge particularly given the current poor public transport provision to and from the Park making private transport a necessity.
- **Competition** - the key stakeholders perceive the congestion charge will only benefit the numerous other industrial hubs located within the North West outside of the congestion charging zone.

Public Transport

11.11 Congestion charging and public transport are two topics which are not mutually exclusive. The key stakeholders accept that there is a requirement for greater public transport provisions to be made available to those working or visiting the Park. However, as highlighted above they have serious reservations over the introduction of a congestion charge as a means of achieving this.

11.12 Simply, it is clear to stakeholders the obvious benefits to Manchester City Centre of the congestion charge but there is a general feeling that there will be negligible benefits to Trafford Park - at least until the Metrolink extension to the Trafford Centre finally becomes a reality. However, at present the priority extensions (with funding) are to East Manchester and Manchester Airport with the proposed extension through Trafford Park unlikely to come forward until 2016 at the earliest and there remains significant scepticism that this extension will only come about through private funding – which seems extremely unlikely.

11.13 The perception is that although the Park does suffer from some congestion, it is no worse than other industrial estates and that currently it does not detrimentally impact upon the Park's ability to operate.

Skills and Employment

11.14 An analysis of local economic trends as well as the business survey and responses from consultees suggested that despite national trends, employers on the Park are still recruiting, the export of manufactured goods is still buoyant and employment figures generally are looking strong.

11.15 The consultation process revealed some issues relating to skills shortages and skilled manual labour. Also, the lack of public transport appears to be affecting the ability of young people and those from priority regeneration areas in particular to access employment opportunities on the Park.

11.16 Companies tend to look beyond the local labour market for their workforce for a number of reasons. These include employers prejudice against deprived neighbouring areas; skills gaps in neighbouring areas and accessibility of the Park mean that their labour market extends beyond its immediate environs.

11.17 The consultation process suggested that some companies are experiencing a shortage of engineering skills, particularly electrical engineering. However, it also conversely revealed that a number of electrical engineers on the Park have recently been made redundant. This suggests that there is an opportunity to link those subject to job cuts with companies who have a stated need for these skills.

11.18 There is a prejudice with some companies in employing young people, this combined with the lack of public transport, acts as a major barrier to the employment of young people on the Park. In addition, the jobs that tend to arise on Trafford Park for young people are generally admin, IT and some technical positions. The move away from manual jobs on the Park means the employers have greater skills needs and expectations.

11.19 There is a lack of take-up of formal and informal mentoring and work experience schemes among employers through schools, colleges and skills services providers. This is despite efforts on behalf of providers such as Job Centre Plus who are involved in the Local Employer Partnerships (LEPS) as part of the skills pledge/jobs pledge from central government. There has been very little take-up of LEPS in Trafford Park.

11.20 A new Skills Centre is due to open in September on Ashburton Road and will offer 'off-the-job' training in construction, engineering and motor vehicle repairs. The reason for this is that training with other service providers has met capacity and a new facility was required. The Masterplan needs to acknowledge the potential of this facility.

11.21 Despite recent closures elsewhere in the borough, a job centre has been opened in the Trafford Centre, reflecting the strategic importance of this employment hub. Job Centre Plus report that there are currently far more vacancies than people in Trafford Park.

11.22 Conversely, in nearby Old Trafford, there are high levels of worklessness despite its proximity to one of the city region's largest employment cores. The bulk of the Park's employees come from outside the area.

11.23 There is a current mismatch between skills and available workforce. Despite reports to the contrary, there are a lot of high-level jobs available. People who are employed at lower level jobs rarely progress through the ranks despite Train to Gain attempting to fill these employment gaps using existing employees. Flexible New Deal 2009 will ensure that all customers have a skills check. Future skills shortages are predicted in higher skilled professions, particularly Financial & Professional Services which is a growing sector, without the workforce to support it. It is felt that unless there is more intervention and/or more take up of schemes such as Train to Gain, a lower skilled workforce will be prevalent in the future in Trafford Park.

11.24 It is predicted that future employment growth will be in the hospitality, retail, call-centre, construction sectors. The F&P sector will also continue to develop but the skills needed for these types of jobs are too high level and so are unlikely to affect Trafford employment figures (see point above). People from outside the area are attracted to the high level jobs, to the detriment of local residents.

11.25 There seems to be a lack of flexible working on the Park with a prevalence of shift working which also acts to deter people from working in this area.

Business Needs

11.26 Key issues raised by key business consultees include:-

- Transport and congestion charge affecting journey times to and from the airport;
- Manchester culture for entertaining clients eg. the location of Manchester United FC and the city's industrial heritage;
- The Manchester Ship Canal; and
- Facilities in and around Manchester eg. leisure and tourism.

11.27 It is generally felt that the services / leisure facilities in Trafford Park are satisfactory. The Trafford Centre and the several budget hotels in the vicinity offer a basic level of facility and the Park's proximity to Salford Quays and the city centre mean the area is well provided for in terms of higher end accommodation and entertainment. On a smaller scale, it was suggested that more could be made of Trafford Park Village which has the potential to provide smaller companies with resources and facilities for their staff and business needs. It was felt that signage and parking around the Village would increase its use as well as looking at its branding and marketing.

11.28 It is felt that there is a severe lack of facilities to support the distribution industry with drivers' basic needs such as sleeping, washing and eating arrangements needing to be addressed. Competition for distribution is high and the Park would benefit from becoming more competitive in this area.

11.29 There is a current lack of both formal business networks. More could be made of local supply chains and collaborative working for the greater good and economies of scale. There is a lack of awareness of the activities of neighbouring businesses and it would be beneficial to have a means to communicate with both major landowners and major occupiers on a collective basis. Although there are some informal networks operating within the Park there is a lack of cohesiveness with these groups which has a tendency to cause duplication and inefficiency.

Planning Framework

11.30 Some of the views expressed regarding the status and purpose of the final Masterplan include the need for it to help facilitate future development rather than stifling it by being too prescriptive and the necessity for its incorporation into the LDF process. This would enable the Masterplan to become an influential document which is supportive of the issues outlined in the core strategy and aid in dispelling the notion that Trafford Park was to be considered as a predominantly industrial area with a few peripheral uses. However they concerns were raised over the term 'masterplan'. It was felt that it referred to detailed guidance rather than an overview which could potentially be restrictive to development rather than conducive.

11.31 The majority of the skills and business organisations and service providers would like to see the Masterplan acknowledge and support existing skills, training and other support programmes for the good of the Park, Train to Gain and LEPs. It was suggested that the Masterplan should be considered to be a 'vision' with a 'strategy for delivery' rather than simply a spatial masterplan, which identified ways and incentives for private sector to help TMBC deliver the vision.

11.32 There appears to be a common goal in seeking to achieve a transformational redevelopment of the Eastern Gateway to the Park; the question asked during numerous consultations was how will the planning process support such a move? What influences can/will the Local Authority bring to bear to ensure that the aspirations of all are achieved? There is a need to ensure that the concerns of developers and investors are satisfied as it is likely that it will principally be private sector investment that will define and create the areas identified as transformational rather than by direct investment from the local government.

11.33 If the aspirations to take this area to the next stage of its evolution are genuine, then the consultees' views are that there must be a positive planning policy that encourages, rather

than fights, against development and that is development of all sectors if they are viable options, including residential and commercial.

Section 106 and other Planning agreements

11.34 The principal issue highlighted by the consultation to date included whether or not Section 106 payments likely to increase in order to support private sector funding of the Trafford Park Metrolink extension. Planning stipulations for the replacement of trees and green areas within the Park as part of conditions for development is understood by the property community given the need for environmental sustainability, however, the underlying issue for developers is how this approach affects the ability for Trafford Park to function effectively as an industrial estate. As we comment further on in this section – visibility is key to owners and occupiers alike.

11.35 Developers have concerns as to how and when the levels of section 106 payments are determined. In general section 106 costs are only ascertained at the planning stage which is a little late from a developers point of view. Given the difficult property market conditions it is essential for developers to understand all costs at an early stage in order to analyse the viability of a scheme. For transparency and in order to positively influence the development of key areas within the Park, suggestions from some stakeholders included fixed rate payments which would be structured, for example, on a rate per sq ft basis setting out a tariff for each sector (retail /office/industrial/residential).

11.36 Stakeholders also expressed a need for greater transparency as to what section 106 monies are used for. It is not suggested that this money is being miss-appropriated, but that a better understanding of how it is being spent could be used to promote the development from which the monies have been acquired. For example, if the intention is to provide a bus stop close to the subject development based on the funding provided by the developer it would be a positive marketing tool for prospective tenants/investors. Greater communication and partnership with the local authority is required.

Sustainability

11.37 The issue of sustainability is very much integral to the redevelopment of the area. There is an appreciation from developers/stakeholders that to achieve regeneration of the area the quality and sustainability of the product must improve. The concern that has been expressed is to the level of sustainability to be imposed on developers to receive planning. If the standards set are too exacting then development may become cost prohibitive.

Amenities

11.38 Amenities within Trafford Park are currently limited with a small number of offerings located within The Village. The Trafford Centre obviously offers a huge number of amenities,

however, its location and dependence on the car to travel to it still leaves a void in the middle of Trafford Park. This needs to be filled in order to effectively serve employees and visitors to the Park and to encourage further occupiers to locate to the Park.

Incentives

11.39 In an increasingly competitive market there is now a greater need to be able to offer more financially attractive deals than others. It was questioned whether such incentives could be brought forward by the local authority offering not only training and educational support but also direct financial incentives. Such investment could enable the strategic targeting of major employers whose relocation to the Park would create a large number of jobs.

Branding and Marketing of the Park

11.40 Due to the fragmented ownership of the Park there is no comprehensive, 'joined-up' marketing strategy for the area. The Park benefits from a strong identity due to its age, diversity of product and reputation, however, there are a number of other industrial locations within the North West developing strong identities. Trafford Park needs to maintain its prestigious reputation and as such must consider how a cohesive marketing campaign could be run in order to move the image of the Park forward. The feeling is that such a venture would not only benefit the Park and its owners but the wider Borough and communities within it.

11.41 It was felt that the Masterplan should examine the historical and current branding of the Park and make recommendations for re-branding and more effective marketing. Its industrial heritage is obviously key as well as its sporting history which goes beyond the presence of MUFC and Lancashire County Cricket Club.

Security

11.42 Security on the Park has been a problem for many years, although improvements have been made in recent times with the trend being moving towards individual gated estates. There does not seem to be a solution to a Park-wide security strategy and, based on that, individual landlords have invested in securing estates to include security huts with access barriers, full perimeter fencing and CCTV. With the movement towards gated industrial communities the question was raised of what impact will this have on the estate overall. It was queried whether further fragmentation of the estate could occur and what the benefits of a more open industrial estate with an emphasis on a 'Park-wide' security service could be. These questions will answer themselves over the coming years but there is a clear intention from the major stakeholders to take security into their own hands. Gated schemes do seem to have been successful for a number of reasons:-

- There has been a reduction in crime for tenants located on the estate.

- Secure schemes are more desirable from the occupiers point of view
- The implementation of security has enabled rental growth.

11.43 Security and business crime is seen as an issue on the Park with both consultees and business survey respondents commenting on and raising concerns regarding this subject.

Visibility

11.44 The Park is detrimentally affected by extensive vegetation which impacts on many of the areas that are referred to within this text. We have highlighted the following issues in order to demonstrate the scale of the issue:-

- Security – extensive vegetation around sites and buildings offers thieves the opportunity to target businesses unnoticed thereby reducing the effectiveness of increased security measures.
- Planning – it remains a pre-requisite to either plant or pay for the planting of any trees removed from the redevelopment of sites on the Park. There is a common acceptance that there is merit in maintaining an aesthetic appeal of the area although the cost that the Local Authority wishes to place on this needs to be addressed.
- Transport – navigation around Trafford Park is difficult for a number of reasons including poor signage, a lack of clear delineation between areas, extensive vegetation and the number of one way streets and limited access routes. The lack of a comprehensive public transport system also causes problems.
- Marketability – properties that are less visible do not have the same level of appeal to occupiers and therefore suffer in terms of rents and occupier demand. This is an issue that could potentially be resolved with strategic remodelling of vegetated areas.

The Future Development of Trafford Park

11.45 From the research we have undertaken, including the work we are involved with in addition to the masterplan and the discussions we have had with the major stakeholders, it seems clear that the Park is developing around three main core areas, each with its own identity, market and physical factors influencing its development:-

- Peel Rectangle encompassing the Trafford Centre;
- The Core, historic industrial heart of the Park
- The Wharfside Gateway

11.46 Discussion took place regarding the transformational aspirations of various parts of the Park. For instance tourism, leisure and redevelopment proposals for Wharfside, with a possible spill-out of Trafford Centre rectangle-type uses to there and Pomona. The issue of

consistency with the Regional Spatial Strategy of various developments was raised and views were expressed regarding the north-west area of Trafford Park needing major work and upgrading.

11.47 The Peel Rectangle offers extensive retail and leisure accommodation by way of the Trafford Centre and supporting facilities such as a five-a-side football facility, golf driving range and indoor ski slope. The Trafford Centre receives more than 30 million visitors per annum and with the recently opened Barton Square it has increased its offering to include bulky home and furniture products.

11.48 Peel has aspirations to develop additional office accommodation in the area to complement its existing Venus office development. The company has also recently obtained planning permission for a further 100,000 sq ft development on the former Kratos site close to Parkway and intends to further develop Trafford Quays to include residential development.

11.49 The Core is and will continue to be the industrial heartland of the Park. It is felt that there will be a contraction of the Core as peripheral areas are redeveloped for higher value uses. This contraction should lead to a reduction in the supply of industrial accommodation and available land which in turn could aid in the redevelopment of outdated accommodation beyond their economic lives, increase occupier demand, rental values and fundamentally the quality of the industrial environment. At present redevelopment of existing holdings is hindered by difficult economic conditions and the cost of development. This has led to a preference for refurbishment of older stock rather than redevelopment and inhibits rental growth.

11.50 The Wharfside Gateway offers the greatest opportunity for transformation within Trafford Park. As an area it benefits from being home to one of the most famous football stadiums in the world – Manchester United's Old Trafford. In addition, the profile of this part of the Park has been aided by the commencement of Peel's Media City development on the opposite bank of the Manchester Ship Canal and the confirmation that the BBC will become its anchor tenant in 2010. This has led to a desire to promote this area as a mixed business/leisure and residential location. This can be illustrated by the aspirational mixed use scheme proposed by Howard Holdings for their Gateway development which will include in the region of 70,000 sq ft of office accommodation, a 190-bed hotel and 750 apartments.

Summary and Conclusions

11.51 Many of the views and opinions expressed by the key stakeholders consulted to date echo the majority opinions being expressed in the wider business survey. For example there were shared concerns on the following:

- Public transport provision and its impact upon access to employment; notably for some deprived neighbourhoods that are relatively close to the Park geographically such as Old Trafford. All interviewees were generally supportive of improvements to public transport;
- Amenities for the workforce;
- The Park benefits from its proximity to the airport and the city centre but has yet to capitalise on its proximity to media city;
- Skills gaps and employer prejudices are the main barrier to local people being employed in the Park;
- There is little cohesive working or networking between companies;
- The branding and profile of the Park needs to be improved;
- Employment levels could be increased with more flexibility, better facilities for some sectors such as distribution, more on the job training, more take up by employers of schemes such as Train to Gain and improved public transport;
- The benefit of allocating functions to different areas of the Park needs to be assessed and developed accordingly - for example the option for allocated areas for the development of leisure and tourism, manufacturing & distribution, business services, digital & new media etc; and
- The masterplan needs to have statutory influence and support existing programmes and schemes for the development of both employers and their workforce

11.52 This would seem to both validate the findings of the survey, and also underpin that there are some common themes emerging from consultation with a range of businesses and stakeholders with an interest in the Park. The Masterplan will need to explore these issues and further and develop appropriate and deliverable solutions where appropriate.

12 Workshops

Introduction to Options Workshops

12.1 In order to allow key stakeholders from both the public and private sector to input into the development of the vision, the study team organised a series of workshops to help prompt discussion and develop ideas about a vision for Trafford Park.

12.2 The main stakeholders can be broken into three distinct groups defined as employers located on the Park, key landholders and developers (of which a core group control a large proportion of the Park) and public sector agencies and authorities with activity in and around the Park. Four three-hour workshops were held with each of the stakeholder groups invited to one and the public sector representatives having the choice of two workshops due to volume of numbers anticipated in this group.

12.3 The format for the workshops included a presentation of the main findings from the baseline report with emphasis on the issues and challenges that have been identified through this report. This helped to act as a prompt for later discussions. Following the presentation, discussion groups were formed which each had a chair to guide discussions. The following headings were used to help steer discussion topics:

- Vision for Future of Trafford Park
- Preferred Mix of Uses
- Emerging Spatial Strategy
- Transport Infrastructure
- Environmental Enhancements and Branding
- Management, Co-ordination and Workforce Development
- Utility Infrastructure, Energy Efficiency and Sustainability Opportunities

Summary of Workshop Discussions

12.4 A summary of discussions from each of the workshops is summarised below under the above topic headings.

Business Workshop

12.5 **Vision for Future of Trafford Park** - Businesses were less inclined to discuss an overall vision for Trafford Park and instead were keen to highlight opportunities and challenges being experienced operating in the area. Despite not being able to draw out a cohesive conclusion on a vision from this particular session, it was useful to have this kind of insight when putting together the vision for the Park at a later stage.

12.6 **Preferred Mix of Uses** It was felt that despite the recent decline in Manufacturing that there is still a place for this type of use on the Park. Several attendees from the manufacturing sector outlined their future aspirations which suggested that employers are keen to remain in the area if it remains economically viable to do so.

12.7 Some of the manufacturing companies felt that it might be a challenge to attract B1 users to the Park. However it was suggested that there may be some merit in targeting call-centre and service development type users. R&D was also identified as a potential development sector.

12.8 Distribution was highlighted as an area for potential development but it was felt that Trafford Park needs to become more competitive for this to happen. For example it was suggested that facilities for lorries and drivers need to be developed as well as improved signage and communication for foreign drivers.

12.9 **Existing Spatial Strategy** - Businesses recognised that the area around the Trafford Centre was the most obvious retail cluster with Wharfside as the most defined B1 cluster. Businesses were generally unable to comment on ideas for a spatial strategy but it was felt that there was still definitely a place for heavy industry and manufacturing within the core of the Park.

12.10 **Transport Infrastructure** - The proposed congestion charge dominated discussions on transport infrastructure which in itself was the most emotive discussion topic during the business workshops. Businesses were generally anti-TIF for the main reason that it would penalise employees and make it less competitive as an area in terms of recruiting staff and also attracting future business locations. A couple of companies suggested they would look at changing shift patterns to avoid charging and others had even discussed relocating if charging was introduced.

12.11 Public transport was also discussed at length. Most companies felt that the introduction of an improved bus network would be challenging to implement. However, people felt generally positive about the potential for cycling as a sustainable mode of transport. It was pointed out that cycling was currently dangerous but that further investment in the network could pay off in terms of increased usage.

12.12 Congestion tends to be a problem around the Trafford Rectangle which at certain times of the year can conflict with business traffic. However, it was recognised that congestion within the Park was not a huge problem.

12.13 Businesses were generally positive about the potential increased use of the waterways and rail links although it was recognised that these modes would need considerable investment.

12.14 Environmental Enhancements and Branding - Environmental enhancements to improve safety and security for both employees and businesses were discussed as well as open space and public realm improvements. However it was felt that safety and crime reduction measures took priority over the more aesthetic improvements to the Park.

12.15 Businesses were keen to see Trafford Park's sporting heritage play a key role in the development of a brand. Branding was seen as very important by businesses as an inward investment tool.

12.16 Businesses with a distribution arm to their operation felt that although they'd been significant improvements to signage around the Park that orientation could be better due to the lack of obvious landmarks.

12.17 Management, Co-ordination and Workforce Development - The issue of recruitment was a key challenge for employers on the Park. Recruitment is made difficult because of the lack of appeal of shift working and blue-collar technical positions. Increased car ownership has also resulted in a decline in the reliance of a local labour force which may be an issue that needs to be addressed.

12.18 Utility Infrastructure, Energy Efficiency and Sustainability Opportunities - There were several specific issues related to utilities which were identified such as the poor wireless BT connection and the lack of gas supply in the North East area of the Park. Issues relating to the sewerage works and the impact of the potential for development in this area was also discussed.

Developer / Landowner Workshop

12.19 General Comments - The landowner and developer workshops offered a useful commercial perspective on the vision for Trafford Park. They brought a practical dimension to the discussions in terms of what is workable in the current climate and valuable expertise of the property market on a localised level.

12.20 Vision for Future of Trafford Park - The developers emphasised the significance of input by neighbouring authorities if Trafford MBC make moves to strengthen the position of Trafford Park. In other words, the future intentions of other areas in terms of their respective employment land offers need to be considered to avoid conflict of interest and unwanted competition.

12.21 Preferred Mix of Uses - It was felt that a sustainable mix of uses, tenures and flexible leases was needed to encourage new enterprise and establish a better climate for innovation and creativity in terms of new enterprise.

12.22 Like the businesses, the developers and landowners recognised that there was a place for manufacturing in the Park as long as it was viable. It was suggested that the scope for introducing advanced manufacturing should be thoroughly explored as part of the Masterplanning exercise.

12.23 **Emerging Spatial Strategy** - It was generally felt by developers that the industrial heart of the Park is here to at least in the medium term and the relocation of some of the industrial and heavier manufacturing occupiers is not feasible. For example, sites which now accommodate scrap yards and fuel depots are not easily vacated nor are they easily re-inhabited.

12.24 It was suggested that the Masterplan should not rely entirely on the use of CPO powers to enable the implementation of a spatial strategy. It was felt that the Masterplan itself should influence planning policy and developers are keen to see it incorporated into the LDF process. They were particularly supportive of the issues outlined in the core strategy and the notion that Trafford Park was no longer to be considered as a predominantly industrial area with a few peripheral uses.

12.25 The size of the Park was emphasised and it was suggested that the Study Team should try and limit their focus to a few core areas of the Park. Developers in principle supported the idea of relocating businesses to allow for sector clusters to develop but were sceptical of the practicalities of this.

12.26 **Transport Infrastructure** - Congestion charging generated a mixed response from the landowners but most felt that the TIF bid did not consider the needs of Trafford Park. They felt that because of this, the Masterplan needed to suggest a public transport strategy specifically for the Park.

12.27 In terms of current transport issues it was felt that orientation and traffic flow around the Park was generally good. Like the businesses, they also recognised that at times there was congestion around the Trafford Centres but also that the M602 junction was also a particular problem.

12.28 In principle, developers and landowners were in favour of the development of tram infrastructure in Trafford Park. Issues relating to funding the system were discussed, in particular the imperative for public funding for the development of the tram. It was recognised that neighbouring local authorities would have strong opinions on any recommendations for the development of the tram system in the Park and that this needed to be considered.

12.29 **Environmental Enhancements and Branding** - In terms of employee amenities, it was generally felt that there was no need to back-fill the provision but that existing amenities could be improved such as facilities at the Village.

Public Sector Workshops

12.30 **General Comments** - A variety of different public sector agencies attended these two workshop sessions who brought with them a wealth of masterplanning and visioning experience. Whilst the business and developer workshops were in a better position to discuss the detailed needs of users of the Park, these groups were more able to discuss policy context and possible delivery strategies.

12.31 **Vision for Future of Trafford Park** - It was felt that Trafford Park needs to go beyond a Masterplan to get a proposition which will attract the investment. The feasibility of a URC or special purpose vehicle to help implement the vision was discussed at length. It was also felt that any vision and objectives really need to be deliverable otherwise it is unlikely to be considered seriously in planning terms.

12.32 Stakeholders were also well aware of the role of neighbouring authorities in determining the influence the Trafford Park Masterplan may have in terms assisting the development of the regional retail centre (Trafford Centre) and the proposed urban extension at Wharfside. They were keen to see buy-in from neighbouring authorities from the outset which would encourage the connectivity to Mediacity:uk and Manchester City Centre.

12.33 Agencies recognised the opportunity to deliver and support one of the largest brownfield sites in Europe into a high functioning site with existing strong infrastructure through the masterplanning exercise.

12.34 **Preferred Mix of Uses** - The public sector groups felt that there may possibly be a future for manufacturing in the core of the Park but that it would generally be a less significant offer to what has been seen previously.

12.35 Agencies were not adverse to seeing the development of possible residential sites in the area, possibly around the Pomona / Quay area. The nearest residential amenities are in Old Trafford but it was felt that there may be scope for these types of developments in the Park if residential was pursued in some areas.

12.36 The question over the general acceptance of the Park by local authorities was also discussed at length. For example, is there scope for a public sector presence in the Park?

12.37 **Emerging Spatial Strategy** - There was consensus over the identification of different functioning zones with a more concentrated industrial core. The nature and profile of this industrial core was discussed with general feeling that there was still a place for heavier industry and manufacturing in Trafford Park as well as trying to encourage advanced manufacturing and further B1 use.

12.38 **Transport Infrastructure** - It is difficult to navigate around the Park without prior knowledge of the area. There was a perception that people are not keen to work in Trafford Park as they cannot get there easily or find their way around and pedestrians and cyclists have difficulties with permeability (this was not echoed by the employers group).

12.39 The M60 is a third of the size of the M25 yet still has the same number of junctions, this makes it one of the busiest in the world, although there are long term improvements in the pipe line

12.40 A Metro extension through Trafford Park is currently financially dependant on the TIF bid, although it is difficult to position the Metro stops due to low density. Shift working patterns within Trafford Park can cause problems for public transport. There are a few short/medium term solutions in place to rework transport issues

12.41 **Environmental Enhancements and Branding** - There is a general opinion of the Park only containing dangerous/heavy industries. There is a need to reduce offensive side of industries.

12.42 There is beautiful green space within the Park but it is closed off for security reasons, while businesses currently turn their back on the Bridgewater greenery which is neither safe nor taking advantage.

12.43 Better signage is needed and would make a difference, although it is difficult to sell Trafford Park as an office location due to its reputation.

12.44 **Utility Infrastructure, Energy Efficiency and Sustainability Opportunities** - If were to recycle expelled heat from industries there would be concern over water neutrality. There are treatment works within Daveyhulme and Salford which currently use anaerobic digestion but it is not currently at the level where it satisfies its own requirements. Order of reusable waste between companies needs to be assessed to see what order it can be recycled in.

Summary of Findings

12.45 There was consensus on a number of issues with the various workshops mentioning many of the same points. Both groups had a high level of awareness regarding policy alignment. The key points are set out below.

12.46 **Vision for Future of Trafford Park:** at three of the four workshop sessions extensive discussion highlighted the concern over the influence of a masterplan for Trafford Park both in terms of it's status and also it's reception by neighbouring authorities. They were keen to see the development of a robust and all encompassing vision to help drive forward the objectives.

12.47 Preferred Mix of Uses: strong commitment to maintaining the Parks historic role as a centre for industrial employment, while accepting that there would be some reduction in employment. Agreement of the need for diversification including residential and office, at the appropriate locations in the Park.

12.48 Emerging Spatial Strategy: both the public sector and developed workshops acknowledged the need for neighbouring Local Authorities to be supportive of, of neutral to, the spatial strategy. There are major development planned at Salford Quay, and sensitivities with regard to retail.

12.49 Transport Infrastructure: the congestion charge dominated the discussion at the business workshop, although it was thought that shift patterns of many large employers and flexible hours and working would reduce the impact. There was agreement across the workshops on the need to improve public transport and to improve congestion/delays at key junctions

12.50 Environmental Enhancements and Branding: there was more interest from the public sector, than the private sector in environmental enhancement, although efforts to reduce crime were raised as important by all parties. The need to improve branding was recognised, although this was less of a priority for businesses currently dominated on the Park.

12.51 Management, Co-ordination and Workforce Development – Groups were generally keen to see the development of an effective management strategy to help drive forward the various objectives put in place to deliver the vision.

12.52 Utility Infrastructure, Energy Efficiency and Sustainability Opportunities – Utility infrastructure is in places poor and it was agreed that this should be addressed as a matter of urgency if the Park is to truly become a 21 Century employment site.

13 Summary and Implications

Summary of Key Findings

13.1 A summary of the key findings from the Masterplan is set out below.

Planning and Regeneration Context

13.2 The key findings from a review of relevant planning and regeneration policy/strategy and major development planned or underway in and adjacent to the Park has revealed the following key issues for the Masterplan:

- The Trafford Park Masterplan should set out a co-ordinated approach to its future development given the scale of recent change seen on the edges of the Park and the lack of a clear recent plan for the area;
- There is significant development either planned or underway around the edges of the Park which is impacting upon the area's dynamics;
- Proposals for the Park should seek to meet the objectives of a range of local, sub-regional and regional planning and regeneration policy as well as making links with major developments in the area to maximise the impact of the Park on the local area and regional economy;
- The findings from the Masterplan work should influence planning policy in the area and will determine the nature of the final Masterplan document itself;
- The Park's profile as a premier business location and major economic asset for the regional economy needs to be raised;
- There is a need for the Masterplan to set out clear objectives for the Park in relation to design standards, environmental objectives and the use of developer contributions; and
- Transport policy, in particular the Metrolink expansion and proposed congestion charging, is likely to have a major impact on the Park, in particular with regards to environmental impact / increasing public transport usage and the ability for people in priority regeneration areas to access economic opportunities.

Economic Activity

13.3 An analysis of economic activity on the Park has revealed the following major issues for consideration within the Masterplan::

- Trafford Park is the main driver for economic activity in Trafford.

- Greater Manchester Urban Core is a major employment centre within the North of England and within this Trafford follows Manchester City Centre as the most dynamic employment area.
- Manufacturing currently employs the most number of people in the Park but has seen gradual decline over recent years.
- Business Services, Retail, Wholesale and Distribution current rank as the next highest employers in Trafford Park after manufacturing.
- Business services, retail and wholesale have seen steady growth between 1991 and 2006 with distribution employment remaining at a similar level over the past 14 years.
- The Park is dominated by medium to large sized businesses.
- Businesses remain dynamic in Trafford Park with VAT registrations continually outnumbering de-registrations over the past 12 years. The most dynamic sector in terms of VAT registrations is Real Estate.
- From 2006 and 2026, high growth is predicted in retail, wholesale and distribution; steady growth is predicted in business services and transportation and communication; slow growth is predicted in construction and steep decline predicted in manufacturing.

Land Ownerships/Property Market

13.4 An analysis of land ownerships and the property market has revealed the following key issues for the Masterplan:

- Trafford Park is set for considerable change over the next decade with the continued regeneration surrounding the Trafford Centre, the redevelopment of industrial accommodation within the core and a considerable shift from industrial to higher value mix of uses within the Wharfside area of the Park expected.
- Trafford Park in its core is still regarded by investors as an area of opportunity in which the development of new high quality industrial accommodation will succeed.
- The Wharfside Gateway offers considerable mixed use regeneration potential due to its location to key drivers; Media City and Manchester United Football Club are huge opportunities that TMBC have yet to capitalise on. The benefits of such attractions and opportunities need to be embraced by TMBC in order to drive the area forward.
- The Parks suffers in part from fragmented ownership, however, the belief is that this has not and will not hinder development but may well mean that on-going development is undertaken on a smaller, more piecemeal basis rather than had it been within a singular ownership.

- There are a number of key issues highlighted by owners in the Park in particular congestion charging, section 106 payments, Metrolink extension, security and visibility which require serious debate and resolution.

Urban Design

13.5 A summary of the key findings from the initial urban design analysis is set out below:

Public Realm

- There are very large blocks of wholly private space within the Park, with a relatively small amount of clearly-defined public space
- In some areas of the Park there is a lack of a clear definition as to what is private space and what is public space
- There is a considerable proportion of semi-private space within the Park, with potential to use some of this much more effectively than at present - notably on frontages of key routes and in areas where a change to higher-value land uses is being sought. This will not only lift the overall appearance and environment within the Park, but encourage greater non-vehicular movement and could improve the Park's investment potential
- The Park's most significant public space - Trafford Ecological Park - is not readily recognisable and has restricted access.

Land Use

- The Park has no single predominant land-use using the finer-grain land use classifications, with 'clean shed' uses are the most prevalent of all land uses;
- Seven loose character areas can be identified;
- Northern belt of non-clean, hazardous and distribution uses;
- Large-scale hub of retail and leisure uses to the south-west of the Park; and
- The Village and several other examples of small sheds/ offices clusters represent fine-grained concentrations of workers and people.

Townscape Areas, Features, Views and Vistas

- views tend to be are coincidental and not 'true' vistas;
- The Park has very few vantage points - only bridges;
- There are several interesting features/engineering structures in and around the area, notably relating to the Ship Canal and railway lines; and
- The Park has very few landmark buildings to orientate or understand areas..

Street Quality

- Centenary Way and Tenax Road are un-necessarily confused by roundabouts;

- Ashburton Road West is disorientating because of its sharp bends;
- The M60, Trafford Boulevard and Barton Dock Road are very busy, noisy and polluted roads;
- There are several roads such as Westinghouse Road that need to be more useable in relation to the wider network- they have potential but are 'punching below their weight';
- There are roads such as Trafford Wharf Road and Village Way that perform well in most areas, but still have scope for improvement.

Landscape and Natural Features

- There are 'Unexpected joys' such as Trafford Ecological Park and church garden;
- There are pockets of well-established green infrastructure/ ecological buffer in places;
- There are large quantities of underexploited landscape- particularly in most westerly corner;
- There are underexploited/ ignored features such as Thirlmere Viaduct, Bridgewater Canal and Ship Canal;
- There is a lack of landscape and natural features in the east of Trafford Park.

Transport and Movement Summary

13.6 The baseline assessment of transportation in the study area reveals an industrial area with many positive attributes for mixed use development, in particular:

- The Trafford Park area benefits from its proximity to the strategic transport network, the Manchester Ship Canal, the rail network and Manchester Airport.
- The potential for significantly improved public transport accessibility with the proposed extension of Metrolink and a new interchange at White City;
- Generally there are relatively low levels of traffic congestion within Trafford Park, except on match or event days at the football ground and peak and seasonal retail travel periods;
- The Trafford Park environment is in some places favourable for walking. In particular, traffic levels are relatively low, walking paths are wider than average, and the historic buildings within Trafford Village create a pleasant environment for the pedestrian;
- High quality and quantity of some of the cycle paths within and surrounding the Trafford Park area; and
- There is a desire from the public and private sector to improve and encourage access to the Trafford Park area by sustainable modes of travel, through an initiative in place to develop an area wide and company travel plans.

13.7 However, a number of specific areas for improvement are identified, most particularly:

- Severance. Transport infrastructure (major roads, rail lines and waterways) and large plots of land form a barrier to access both within and to/from the area;
- The size of Trafford Park area. This inhibits the encouragement of alternative sustainable modes of travel such as walking or cycling, in addition to the general uninviting industrial environment of parts of the study area;
- Traffic speed and type of traffic. Current speeds of passing traffic and the volume of HGVs create an unsafe cycle and walking environment within the area and further increase pedestrian severance.
- A High Car Mode Share. Approximately 80% of people travel by car to the Trafford Park area, for work. However, it is noted that approximately 85% of people travelling to Trafford Park for work live in the Greater Manchester area and therefore with improved transport provision and conditions could use alternatives to the private car;
- Public Transport Accessibility. Improved public transport provision is required to the masterplan area, in particular the centre of Trafford Park, to improve accessibility and derive mode shift from car travel.
- The rail station. Current rail service levels are too infrequent to provide a reliable travel option to access the masterplan area.
- The Waterways. Despite Trafford Park being surrounded by canals and being afforded substantial waterfront coverage access to water frontages is restricted by private ownership of adjacent land. Where pathways are present they are often unmarked and not clearly accessible. The potential for mixed used development along the canals is great.

EKOS Skills Assessment

13.8 The following main points can be drawn from the Skills Assessment chapter:

- The core areas of Trafford Park's labour market benefit from a youthful population;
- Trafford Park's current core labour market is higher qualified and skilled and this trend has increased in the past four years;
- Proportion of residents with no qualifications has decreased but this still presents a challenge;
- Trafford has the highest level of higher-educated residents, with the majority based in white collar occupations
- Residents who work within the manufacturing industry will need to be upskilled/reskilled;
- The labour forces within Trafford, Manchester and Salford are becoming increasingly well qualified at a level 4 standard;

- The proportion of residents with no qualifications is declining;
- There has been a notable demise in apprenticeships as qualifications take precedence;
- There is long term deprivation in Salford & Manchester which needs long term solutions, but Trafford has more manageable deprivation levels; and
- Trafford Park can still play a role in contributing to the borough's worklessness problem.

EKOS - Business Survey

13.9 The business survey captured the views of approx. 10% (120) businesses. The key points emerging raised are:-

- There is a large proportion of non UK owned businesses on Trafford Park (24.4%)
- There are lots of established business in the Park; 55% have been based there for over 10 years
- There have been relatively positive views with regards to performance and growth of businesses from the surveyed companies
- There is little or no collaborative working between the companies but there is some desire to do more
- Staff skills issues are important to the businesses
- Public transport links are seen as lacking within the Park and are considered important
- There has been a decent level of involvement from the businesses in Trafford Park who have given permission to contact them again

13.10 Over half of the businesses who took part in the survey would like to be contacted again regarding the Masterplan, showing willingness to assist with developing future plans for the Park. It will be important to continue to engage with businesses on the Park throughout the development of the Masterplan.

Next Steps - Development of the Vision for Trafford Park

13.11 The next stage of the commission will take the findings from the baseline assessment stage to develop thinking and begin working towards an outline Framework for the Trafford Park. It will be a collaborative process involving key strategic partners in using the findings from the baseline assessment to develop a vision and priorities for the Trafford Park area.

13.12 It is suggested that an options workshop is held with the Steering Group in order to develop a series of options for the future of Trafford Park. Following this workshop, the study team will develop a series of options for consideration in a series of visioning workshops with key partners. These options would include:

- The economic drivers that will foster economic growth across the area
- The spatial vision for the area, based on economic drivers
- A strategic transport and infrastructure plan required to support the vision
- The policy required to support the economic vision and any tensions that may require resolution

13.13 Recognising the differing interests of the variety of partners with a stake, we have allowed for 4 visioning workshops which will consider the range of potential options for the future direction of the Park. The exact make up of these workshops would be agreed with the Steering Group, although we would envisage inviting a range of key business/landowner interests together with the major public sector stakeholders. These 'visioning workshops' would involve a presentation and discussion of the options developed and their implications for a vision for Trafford Park, exploring the key objectives around which the Masterplan should be based across a variety of themes, including property, design and sustainability, transport and access, business support and skills requirements. The workshops will debate and test an overarching framework and potential vision for the Park, as well as exploring a potential set of strategic interventions/projects.

13.14 In addition the Study Team will identify six case studies from around the UK, Europe and beyond where major transformational change is already underway on a scale which is relevant to Trafford. These case studies will be useful in providing the Steering Group with an assessment of the potential for and scale of change required to compete nationally and internationally.

13.15 The outputs from this stage would be presented in a short paper to the Steering Group which would summarise the preferred vision and outline framework for Trafford Park for review by the Steering Group.

ANNEXE 1 - Business Survey Questionnaire

Trafford Park Business Survey

(Please tick one box unless otherwise indicated)

PART 1- COMPANY OVERVIEW

What is the location of your parent company?

| | | | | | | | |
|-------------------|--|-------------------|--|---------------|--|--------------------------|--|
| North West | | Rest of UK | | Europe | | Rest of the World | |
|-------------------|--|-------------------|--|---------------|--|--------------------------|--|

How many other offices / business units does your company have?

| | | | | | | | |
|----------|--|------------|--|-------------|--|----------------|--|
| 0 | | 1-5 | | 5-10 | | 10 plus | |
|----------|--|------------|--|-------------|--|----------------|--|

Which of these best describes your organisation's presence at Trafford Park?

| | | | | | |
|-------------------------------|--|------------------------------------------|--|-----------------------------------------------|--|
| Sole business premises | | HQ of company with other premises | | One of company's other non HQ premises | |
|-------------------------------|--|------------------------------------------|--|-----------------------------------------------|--|

How long have you been located at Trafford Park?

| | | | | | | | |
|-------------------------|--|------------------|--|-------------------|--|-----------------------------------------------------|--|
| Less than 1 year | | 2-5 years | | 5-10 years | | Over 10 years (Please indicate how long) | |
|-------------------------|--|------------------|--|-------------------|--|-----------------------------------------------------|--|

How many people does your company employ on Trafford Park?

| | | | | | | | |
|-------------------|--|--------------|--|---------------|--|-----------------|--|
| 10 or less | | 11-49 | | 50-199 | | 200 plus | |
|-------------------|--|--------------|--|---------------|--|-----------------|--|

How many employees does your company employ in total?

| | | | | | | | |
|-------------------|--|--------------|--|---------------|--|-----------------|--|
| 10 or less | | 11-49 | | 50-199 | | 200 plus | |
|-------------------|--|--------------|--|---------------|--|-----------------|--|

Which of the following best describes the sector of your business?

| | |
|--------------------------------|--|
| Agriculture and Fishing | |
| Manufacturing | |
| Construction | |
| Distribution and retail | |
| Hotels and Restaurants | |
| Transport and communications | |

| | |
|---------------------------------------------|--|
| Agriculture and Fishing | |
| Banking, finance and insurance | |
| Public administration, education and health | |
| Other services | |

Please could you describe your main business activities and its core products

PART 2 - EXISTING AND FUTURE MARKET DEMAND

Which of the following best describes your company?

| | | | | | |
|--------------------------------------------------------|--|-----------------------------------------------------------------|--|---------------------------------------------------------|--|
| It has experienced growth over the past 5 years | | It has remained at a similar level over the past 5 years | | It has experienced decline over the past 5 years | |
|--------------------------------------------------------|--|-----------------------------------------------------------------|--|---------------------------------------------------------|--|

Which of the following best describes your future aspirations regarding your company's presence on Trafford Park?

| | | | | | |
|----------------------------------------------|--|-----------------------------------------|--|-------------------------------------------------|--|
| We are likely to expand significantly | | We are likely to expand a little | | We are likely to remain the same | |
| We are likely to decline a little | | We are likely to decline significantly | | We are unsure about our future growth prospects | |

What is the main location of your company's end product?

| | | | | | | | |
|-------------------|--|-------------------|--|---------------|--|--------------------------|--|
| North West | | Rest of UK | | Europe | | Rest of the World | |
|-------------------|--|-------------------|--|---------------|--|--------------------------|--|

Describe your relationship with other Trafford Park businesses

| | | | | | |
|--------------------------------------------------------------|--|--------------------------------------------------------|--|-----------------------------------------------------------|--|
| We have a significant amount of collaborative working | | We have a small amount of collaborative working | | We do not work with other Trafford Park businesses | |
|--------------------------------------------------------------|--|--------------------------------------------------------|--|-----------------------------------------------------------|--|

What is the location of your main competitors? (Please tick more than one box if appropriate)

| | | | | | |
|----------------------|--|----------------------------------------|--|------------------------------------|--|
| Trafford Park | | Elsewhere in Greater Manchester | | Elsewhere in the North West | |
| Elsewhere in the UK | | Europe | | The rest of the World | |

What is your current property tenure?

| | | | |
|-----------------|--|------------------------|--|
| Freehold | | Leasehold | |
| License | | Other (please specify) | |

How happy are you with your current business premises on the Park?

| | | | | | | | |
|-----------------------|--|-------------------------|--|---------------------|--|--------------------------|--|
| Very Satisfied | | Fairly Satisfied | | Dissatisfied | | Very dissatisfied | |
|-----------------------|--|-------------------------|--|---------------------|--|--------------------------|--|

Do you have any particular issues with your current business premises?

What are your likely future property requirements within the next year?

| | | | | | | | |
|------------------------------------------|--|--------------------------------------------------------|--|------------------------------------|--|------------------------------------------------------------|--|
| We need a lot of additional space | | We will need a small amount of additional space | | They are unlikely to change | | We are likely to downsize from our current property | |
|------------------------------------------|--|--------------------------------------------------------|--|------------------------------------|--|------------------------------------------------------------|--|

What are your likely property requirements within the next 5 years?

| | | | | | | | |
|------------------------------------------|--|--------------------------------------------------------|--|------------------------------------|--|------------------------------------------------------------|--|
| We need a lot of additional space | | We will need a small amount of additional space | | They are unlikely to change | | We are likely to downsize from our current property | |
|------------------------------------------|--|--------------------------------------------------------|--|------------------------------------|--|------------------------------------------------------------|--|

PART 3 - SKILLS AND BUSINESS NEEDS ASSESSMENT

Which of the following represent your company's most important needs? (Please tick more than one box if appropriate)

| | |
|-----------------------------------------|--|
| Skills / Training of staff | |
| Availability of Staff – numbers | |
| Availability of staff – skills | |
| Financial, access to finance, cash flow | |
| Facilities and amenities for employees | |

| | |
|-----------------------------------|--|
| Skills / Training of staff | |
| Property | |
| Other (Please specify) | |

How far, on average, do your employees travel to work?

| | | | | | | | | | |
|------------------|--|------------------|--|-------------------|--|--------------------|--|-----------------------|--|
| 0-3 miles | | 3-5 miles | | 5-10 miles | | 10-20 miles | | Over 20- miles | |
|------------------|--|------------------|--|-------------------|--|--------------------|--|-----------------------|--|

What is the most common mode of transport used to get work amongst your employees?

| | | | | | | | |
|------------|--|------------|--|--------------|--|---------------------|--|
| Car | | Bus | | Train | | Cycle / Walk | |
|------------|--|------------|--|--------------|--|---------------------|--|

Approximately what percentage of your workforce uses public transport to work?

| | | | | | |
|-----------|--|-------------|--|--------------|--|
| 0% | | 0-5% | | 5-10% | |
| 10-20% | | 20-50% | | Above 50% | |

Approximately what percentage of your workforce cycles or walks to work?

| | | | | | | | |
|-----------|--|-------------|--|--------------|--|-----------------|--|
| 0% | | 0-5% | | 5-10% | | Over 10% | |
|-----------|--|-------------|--|--------------|--|-----------------|--|

24. Has your company taken steps to improve energy efficiency/introduce renewable energy recently?

| | | | |
|------------|--|-----------|--|
| Yes | | No | |
|------------|--|-----------|--|

Which of the following best describes your current workforce?

| | | | |
|------------------------------------------------------------------------------|--|----------------------------------------------------------------------------|--|
| We are very pleased with the size and skills of the current workforce | | We are pleased with the size and skills of the current workforce | |
| We are dissatisfied with the size and skills of the current workforce | | We are very dissatisfied with the size and skills of the current workforce | |

To what extent is the availability of the right quality and quantity of staff a problem to your business?

| | | | | | |
|------------------------------|--|------------------------------|--|----------------------------|--|
| It is a major problem | | It is a minor problem | | It is not a problem | |
|------------------------------|--|------------------------------|--|----------------------------|--|

Do you have any major skills issues amongst your staff?

| | | | |
|------------|--|-----------|--|
| Yes | | No | |
|------------|--|-----------|--|

If yes, please provide further details

Approximately what proportion of your staff have higher level qualifications (Level 4 plus – eg Degree, HND etc)

| | | | |
|-----------|--|--------------|--|
| 0% | | 0-10% | |
| 10-30% | | Over 30%% | |

Approximately what proportion of your staff have no qualifications?

| | | | |
|-----------|--|--------------|--|
| 0% | | 0-10% | |
| 10-30% | | Over 30%% | |

To what extent do you currently train your staff?

| | | | |
|--------------------------------------------------------------------|--|-------------------------------------------------|--|
| All staff receive recognised internal and external training | | All staff receive internal training only | |
| Some staff receive recognised internal and external training | | Some staff receive some internal training | |
| We do not provide training for staff members | | | |

Would you like to deliver further training to your staff?

| | | | |
|--------------------------------------------------------------------|--|---------------------------------------------------------------------|--|
| We would like to deliver more training to all staff members | | We would like to deliver more training to some staff members | |
| We are happy with the current level of training provided | | | |

What are the main barriers to delivering further training?

| Time | | Cost | |
|-------------------------|--|------------------------|--|
| Suitability of Training | | Other (please specify) | |

To what extent are the skill requirements of your business likely to change in the future?

| We are likely to require more skilled staff | | We are likely to require less skilled staff | | Our skill requirements are likely to remain the same | |
|---------------------------------------------|--|---------------------------------------------|--|------------------------------------------------------|--|
|---------------------------------------------|--|---------------------------------------------|--|------------------------------------------------------|--|

Who do you work with regarding skills issues? (Please tick more than one box if appropriate)

| Local Schools | | Local Colleges | |
|--------------------|--|--------------------------|--|
| Local Universities | | Local Training Providers | |
| Local Authority | | Other (please specify) | |

35a. Do you currently work with local schools in the Trafford area regarding the development of the future workforce?

| Yes | | No | |
|-----|--|----|--|
|-----|--|----|--|

If yes please specify details

35b. Would you like to work more closely with schools?

| Yes | | No | |
|-----|--|----|--|
|-----|--|----|--|

If yes please specify in what capacity

To what extent do you engage with public sector organisations?

| | | | | | |
|--------------------------------------|--|--------------------------------------|--|--------------|--|
| Regularly (please specify) | | Sometimes (please specify) | | Never | |
| | | | | | |

To what extent are you involved in any local business networks?

| | | | | | |
|--------------------------------------|--|--------------------------------------|--|--------------|--|
| Regularly (please specify) | | Sometimes (please specify) | | Never | |
| | | | | | |

Would you like to engage more closely with other businesses and partners on Trafford Park?

| | | | | | |
|------------|--|-----------|--|--------------|--|
| Yes | | No | | Maybe | |
|------------|--|-----------|--|--------------|--|

In what way do you feel the public sector could work more closely and more effectively with the business community on Trafford Park?

PART 4 - VIEWS ON TRAFFORD PARK

What was / were the main reason(s) for locating on Trafford Park? (Please tick more than one box if appropriate)

| | | | |
|-----------------------------------|--|------------------------------|--|
| Quality of Property | | Labour Force | |
| Location (Transport Network) | | Location (Access to Markets) | |
| Location (proximity to suppliers) | | Other (please specify) | |

What are your views on the performance of businesses on Trafford Park since you have been located there?

| | | | |
|------------------------------------|--|---------------------------------------------|--|
| They have generally thrived | | They have been moderately successful | |
| They have remained the same | | They have been declining slightly | |

Trafford Park Masterplan

| | | | |
|----------------------------------------|--|---------------------------------------------|--|
| They have generally thrived | | They have been moderately successful | |
| They have been declining significantly | | Don't know | |

What are the main positives of Trafford Park as a business location? (Please tick more than one box if appropriate)

| | | | |
|-----------------------------------|--|---------------------------------------------|--|
| Quality of Property | | Quantity and quality of Labour Force | |
| Location (Transport Network) | | Location (Access to Markets) | |
| Location (proximity to suppliers) | | Other (please specify) | |

What are the main negatives of Trafford Park as a business location? (Please tick more than one box if appropriate)

| | | | |
|-----------------------------------|--|------------------------------|--|
| Quality of Property | | Labour Force | |
| Location (Transport Network) | | Location (Access to Markets) | |
| Location (proximity to suppliers) | | Other (please specify) | |

Did you consider any alternative business locations before locating at Trafford Park? If so which?

Are you aware of any lessons which could be learnt for Trafford Park from any other business parks?

What are your views on the amenities (catering, retail and leisure facilities for staff) offered on Trafford Park?

| | | | |
|------------------|--|-------------|--|
| Very Good | | Good | |
| Average | | Poor | |
| Very Poor | | | |

What are your views on car access to Trafford Park?

Trafford Park Masterplan

| | | | |
|------------------|--|-------------|--|
| Very Good | | Good | |
| Average | | Poor | |
| Very Poor | | | |

What are your views of Public Transport access to Trafford Park?

| | | | |
|------------------|--|-------------|--|
| Very Good | | Good | |
| Average | | Poor | |
| Very Poor | | | |

What are your views on Car Parking in Trafford Park?

| | | | |
|------------------|--|-------------|--|
| Very Good | | Good | |
| Average | | Poor | |
| Very Poor | | | |

What are your views on access and movement within the Park?

| | | | |
|------------------|--|-------------|--|
| Very Good | | Good | |
| Average | | Poor | |
| Very Poor | | | |

To what extent does the quality / lack of quality of transport and public transport connections to the Park impact on your ability to retain or attract staff?

| | | | |
|-------------------------------|--|-------------------------|--|
| It is a major positive | | It is a positive | |
| It has no impact | | It is a negative | |
| It is a major negative | | | |

Have you experienced any issues relating to utilities infrastructure (gas, water, electricity or telecoms) on the park previously? If so what?

Do you have any other views / issues which you would like to raise in relation to Trafford Park?

END.

Thank you for completing this survey. We would be grateful if you could complete your contact details as follows:

Trafford Park Masterplan

| | |
|----------------------|--|
| Name and Role | |
| Company | |
| Address1 | |
| Address2 | |
| Address3 | |
| Postcode | |
| Telephone | |
| Email | |

We intend to follow up the survey with a number of more in depth conversations with a selection of businesses on the Park. In addition we will host a one day open event on Trafford Park later in the year.

Please tick one of the boxes below

| | |
|----------------------------------------------------------------------------------|--|
| I would like to be contacted again regarding the Trafford Park Masterplan | |
| I do not want to be contacted again regarding the Trafford Park Masterplan | |

ANNEXE 2 - List of Workshop Attendees

Monday 15th September - 8.30am Workshop

- John Hogg Tech Solutions
- L'Oreal
- Proctor & Gamble
- Burntree
- Cargill
- Kelloggs
- Pyramid
- Telegraph

Monday 15th September - 12.30pm Workshop

- The Peel Group
- Bserv (Brixton Plc)
- Manchester United
- Bruntwood Estates Ltd

Monday 15th September - 3.30pm Workshop

- English Partnerships
- TMBC
- Salford City Council
- Business Link NW
- Central Salford URC
- MIDAS

Friday 19th September - 8.30am Workshop

- Environment Agency
- Highways Agency
- United Utilities
- GM Chamber
- TMBC
- Manchester Enterprises