Employment Land Review 2012

Warrington
Borough Council

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1 Introduction

1.1 Warrington is a well established business location and as a strong and resilient economy making it a significant centre of employment in the North West.

1.2 Hundreds of national and international businesses are present in Warrington and over 6,000 companies are currently represented in the town, which is situated close to the region's principal cities and Europe's highest concentration of higher education and research and development facilities. The town has a regional workforce of more than 4 million people.

1.3 The National Planning Policy Framework (NFFF) published in March 2012, proposes to largely continue the approach to economic development policy advocated within the existing Planning Policy Statement 4.

1.4 The Framework outlines that the Government is committed to securing sustainable economic growth. The NPPF advises that local planning authorities planning policies should recognise and seek to address potential barriers to investment, including poor environment or any lack of infrastructure, services or housing. The Framework is clear that Investment in business should not be over-burdened by the combined requirements of planning policy expectations. Planning policies should recognise and seek to address potential barriers to investment, including a poor environment or any lack of infrastructure, services or housing.

1.5 In December 2004, the Government also issued a Guidance Note on Employment Land Reviews which provided advice on how to assess the demand for and supply of land for employment. This guide is now somewhat outdated but it aimed to provide specific advice to help planning authorities to identify an up to date and balanced portfolio of employment sites in Local Development Frameworks. The Guidance reinforced that employment land reviews are an integral part of the preparation of Local Plans

1.6 The Warrington Employment Land Review forms part of the evidence base of the Council's Local Development Framework. Warrington has previously monitored its employment land position through its annual Employment Land Availability Statement which is published in annually.

1.7 The employment land review is now a standard requirement in the preparation of development plans and enables the employment land to be balanced against alternative needs.

1.8 As part of the study, the Council has completed a review of the quality of employment sites in the borough over 0.25 ha. For the purposes of this study, the term employment relates to Business (Use Class B1), General industry (Use Class B2), Storage & Distribution (Use Class B8 plus "Sui-Generis" commercial uses) that have similar characteristics to industry or storage. The review was carried out with assistance from Economic Development colleagues.

The review aims to provide the following information:

- Detail the existing employment land situation in Warrington
- Provide a summary of previous studies and trajectory showing the requirement and past take up situation in Warrington.
- Identify key employment locations in the borough and their characteristics
- Provide a clear assessment of the current availability of employment land and premises.
- Identify the most suitable way to bring forward land supply through the core strategy

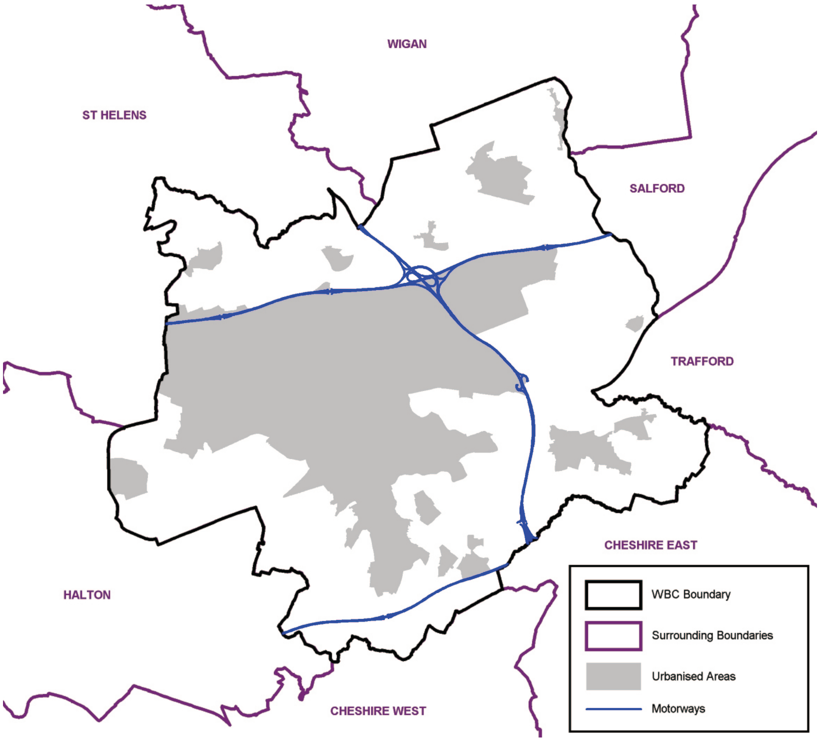
1.9 More detailed information on annual take up of employment land can be found in the Employment Land Availability Statement 2011.

1 Introduction

2 Background Characteristics

Warrington is the most northerly of eight local authorities in Cheshire. It shares boundaries with Halton, St. Helens, Wigan, Salford and Trafford and Cheshire East and Cheshire West. The borough of Warrington covers 176 square kilometres and, at mid year 2009, was estimated to have a population of 197,800 of which 97,900 are males and 99,900 are females, living in 84,877 households.

The town of Warrington is by far the largest settlement in the borough. This, in part, reflects over 20 years of planned growth following its designation as a New Town in 1968. The Warrington New Town Outline Plan, approved in 1973, set out a strategy to expand the town's population from about 120,000 to 200,000 by the year 2000. While the planned rate of growth has not been achieved and some of the supporting transport infrastructure is not in place, the growth that has taken place has markedly changed the status, profile and character of the town.



Picture 2.1 Warrington Location Map

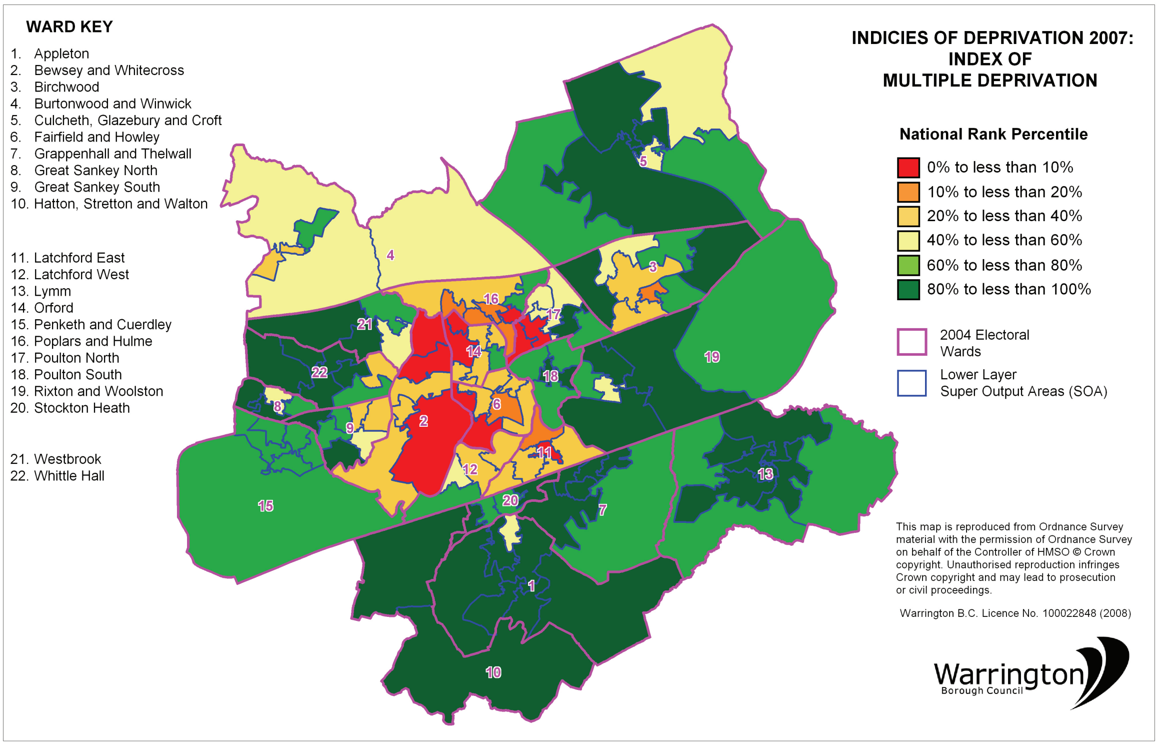
Indices of Multiple Deprivation (IMD) 2010

The Indices of Deprivation 2010 provide a relative measure of deprivation in small areas across England. The IMD is the collective name for a group of 10 indices which all measure different aspects of deprivation, providing a combination to give an overall score.

Within Warrington, 20 Super Output Areas (SOAs) are ranked within the most deprived quintile nationally for multiple deprivation. This is a slight increase from 2007, when 18 of Warrington's SOA fell into the most 20% deprived nationally. The increase may be a reflection of wider economic conditions in the UK. As in previous years, the significant majority of these high ranking SOA are spatially distributed in Warrington's town centre areas.

Considering more severe deprivation, there are 11 Warrington SOAs which fall into the 10% most deprived nationally. This figure has not changed from 2007. Only one Warrington SOA falls into the top 3% most deprived nationally in 2010. This is an improvement from 2007, when SOAs in both Bewsey and Orford ranked in the top 3%. In 2010, only the SOA located in Bewsey in fall into this severely deprived category.

At the other end of the scale, 39 Warrington SOAs are ranked amongst the 20% most affluent nationally. This is a slight decline from 2007 when 40 SOAs were in the least deprived quintile. Warrington's most affluent areas make up most of South Warrington, with other affluent areas found in Westbrook, Sankey, Croft and Rixton.



Picture 2.2 Indices of Multiple Deprivation (IMD) 2007

Earnings (2009)

	Full Time Workers	Male Full Time Workers	Female Full Time Workers
Weekly Pay			
Warrington	496	541.2	449.6
North West	496.2	498.3	408.3
United Kingdom	491	534.4	426.6
Annual Pay			
Warrington	25,792	28,142	23,379
North West	25,802	25,912	21,232
United Kingdom	25,532	27,789	22,183

Table 1 Comparison of Earnings for Male and Female Workers in Warrington, North West and the United Kingdom

Source: Annual Survey of Hours & Earnings ONS 2009

The table above indicates that earnings in Warrington are almost identical to those of the North West and slightly above average when compared to the UK as a whole.

House Prices

	Detached (£)	Semi-detached (£)	Terraced (£)	Maisonette/Flat (£)	All (£)
Warrington	245,119	119,421	80,552	96,915	136,653
North West	221,646	116,372	68,691	108,340	114,075
England & Wales	256,923	153,670	124,601	152,530	163,083

Table 2 Comparison of House Prices in Warrington, North West and England & Wales

Source: Land Registry April 2011

The table above indicates that average house prices in Warrington exceed the average for the North West but are significantly lower than England and Wales as a whole.

Background Characteristics

Car Ownership

(2001 Census)

- The percentage of households with no car is lower in Warrington (20.9%) than regionally (30.2%) and nationally (26.8%).
- The percentage of households with one car is similar in Warrington to the regional and national situation at approximately 43%. There is a higher percentage of households in Warrington with two or more cars / vans (35.7%) than both regionally (26.3%) or nationally (29.4%).
- 73.2% of people aged 16 to 74 in employment in Warrington travel to work mainly by car or van, higher than the regional figure of 66.7% and the national figure of 62%.
- A lower percentage of residents aged 16 to 74 in employment in Warrington cycle or walk (10.4%) or use public transport (6.6%) than is the case regionally or nationally.

Travel to Work

There are significant levels of commuting in and out of the borough to access employment opportunities.

	2001 Flow	2008 Flow
Warrington	65.7%	62.8%
Manchester	7.4%	6.5%
Halton	4.8%	5.6%
Liverpool	2.7%	4.2%
St. Helens	3.0%	2.6%
Vale Royal	0.9%	1.8%
Salford	1.6%	1.5%
Macclesfield	2.4%	1.5%
Chester	..	1.1%
Trafford	2.8%	1.0%

Table 3 Place of Work for Warrington Residents - Ten Biggest Flows

Source: ONS Annual Population Survey (Jan-Dec 2008) and Local Labour Force Survey (2001)

The above table compares travel to work flow data from 2001 and 2008. As of 2008, 62.8% of people living in Warrington also had jobs within the town, which is a decrease of 2.9% when compared to 2001. The close proximity and accessibility of larger centres such as Manchester and Liverpool enable residents to access to employment in these cities, with 6.5% of Warrington residents working in Manchester (decrease of 0.9% on 2001 levels) and 4.2% working in Liverpool (increase of 1.5% on 2001 levels). In addition, 5.6% of Warrington residents have jobs within Halton. In contrast, Chester and Trafford provide jobs for only 1.1% and 1% of Warrington residents respectively, with Trafford showing a decrease of 1.8% between 2001 and 2008.

	2001 Flow	2008 Flow
Warrington	55.6%	54.4%
St. Helens	6.7%	7.3%
Halton	3.9%	5.1%
Wigan	8.5%	4.0%
Vale Royal	1.9%	2.5%
Trafford	2.3%	2.2%
Liverpool	1.7%	2.0%
Chester	..	1.7%
Salford	1.4%	1.6%
Knowsley	1.2%	1.5%

Table 4 Place of Residence for Warrington Workers - Ten Biggest Flows

Source: ONS Annual Population Survey (Jan-Dec 2008) and Local Labour Force Survey (2001)

The above table shows the proportion of jobs in Warrington that are filled by people who live in the local authorities shown. As of 2008, 54.4% of Warrington workers also live in the town, a decrease of 1.2% when compared to 2001 levels. Other than those that live in Warrington, the town's workers reside mainly in St. Helens, Halton and Wigan, with both St. Helens and Halton showing and increase between 2001 and 2008. However, the most significant change has seen the proportion of jobs in Warrington filled by people from Wigan decrease substantially by 4.5% between 2001 and 2008.

Economic Activity (Employment and Unemployment Rates)

	Warrington (Numbers)	Warrington (%)	North West (%)	Great Britain (%)
All people				
Economically active	103,400	80.0	74.7	76.3
In employment	97,600	75.6	68.4	70.4
Employees	87,00	67.5	59.9	60.9
Self employed	10,300	7.8	8.1	9.0
Unemployed (model-based)	6,800	6.5	8.2	7.7
Males				
Economically active	54,300	83.9	80.5	82.6
In employment	51,100	78.9	72.8	75.3
Employees	44,000	68.1	60.2	62.1
Self employed	7,000	10.6	12.1	12.8

Background Characteristics

	Warrington (Numbers)	Warrington (%)	North West (%)	Great Britain (%)
Unemployed	3,200	5.9	9.4	8.6
Females				
Economically active	49,000	76.1	68.8	70.4
In employment	46,500	72.2	64.0	65.4
Employees	42,900	66.8	59.5	59.7
Self employed	3,300	5.0	4.2	5.3
Unemployed	2,500	5.1	6.9	6.6

Table 5 Employment and Unemployment Rates

Source: ONS Annual Population Survey (October 2009 - September 2010)

The table above illustrates employment rates between October 2009 to September 2010. Employment levels in Warrington exceed those in the North West and Great Britain as a whole, whilst levels of unemployment are lower in comparison to the North West and Great Britain.

Employment by Occupation

	Warrington (Numbers)	Warrington (%)	North West (%)	Great Britain (%)
Managers and senior officials	16,700	17.1	14.5	15.7
Professional occupations	14,300	14.6	13.0	13.9
Associate professional & technical	12,300	12.6	13.5	14.7
Administrative & secretarial	10,200	10.4	11.1	11.0
Skilled trades occupations	8,900	9.1	10.1	10.3
Personal service occupations	7,500	7.7	9.3	8.9
Sales and customer service occs	8,700	8.9	8.3	7.4
Process plant & machine operatives	6,900	7.0	7.6	6.6
Elementary occupations	11,900	12.2	12.0	11.1

Table 6 Employment by Occupation

Source: ONS Annual Population Survey (October 2009 - September 2010)

The table above illustrates employment by occupation from October 2009 - September 2010. Managers and Senior Officials make up the highest proportion of employment occupation within the borough (17.1% of economically active individuals), compared to 14.5% in the North West and 15.7% in Great Britain, whilst Process Plant and Machine Operatives comprise the lowest percentage of employment occupation (7.0%) within Warrington, which is slightly lower than the level in the North West (7.6%) and slightly higher than the level in Great Britain (6.6%).

Qualifications

	Warrington (numbers)	Warrington (%)	North West (%)	Great Britain (%)
NVQ4 and above	39,200	30.9	27.0	29.9
NVQ3 and above	64,200	50.6	46.9	49.3
NVQ2 and above	86,200	68.0	64.5	65.4
NVQ1 and above	103,700	81.8	78.6	78.9
Other Qualifications	8,000	6.3	7.5	8.8
No Qualifications	15,100	11.9	13.8	12.3

Table 7 Comparison of Qualifications - Warrington, North West and Great Britain

Numbers and % are for those of working age - % is a proportion of total working age population - Source: ONS Annual Population Survey (January 2009 - December 2009)

In terms of National Vocational Qualifications, Warrington has gained a higher percentage than the North West and GB Average. In terms of other qualifications and no qualifications, Warrington has performed slightly lower than that compared to the regional and national average.

VAT Registered Businesses

	Warrington (Numbers)	Warrington (%)	North West (%)	Great Britain (%)
Registrations	780	13.2%	10.6%	10.2%
Deregistrations	425	7.2%	7.5%	7.3%
Stock (at end of year)	5,920	-	-	-

Table 8 VAT Registered Businesses - Warrington, North West and Great Britain

Source: BERR - vat registrations/deregistrations by industry (2007)

In terms of VAT registered businesses, as of 2007 Warrington fairs better than both the North West and the national average. Warrington also had a slightly lower percentage of deregistrations in the same period.

Business Demography - Business Births and Deaths

VAT Registered Business information is no longer provided. However, Business Demography - Business Births and Deaths is now provided from 2007 onward by the Office of National Statistics.

	Warrington	North West	England
Births of New Enterprises (2009)	795	23,920	209,030

	Warrington	North West	England
Deaths of Enterprises (2009)	935	30,180	248,110
Births of New Enterprises (2008)	890	27,465	236,345
Deaths of Enterprises (2008)	695	23,480	195,185
Births of New Enterprises (2007)	1,035	30,195	246,700
Deaths of Enterprises (2007)	695	23,485	199,300

Table 9 Business Demography - Business Births and Deaths - Warrington, North West and England

	Warrington	North West	England
Births of New Enterprises - Percent Change 2008 - 2009	-10.7%	-12.9%	-11.6%
Deaths of Enterprises - Percent Change 2008 - 2009	+35.5%	+28.5%	+27.1%

Table 10 Percentage Change 2008 - 2009 - Business Births and Deaths

Source: ONS

The above table illustrates that despite Warrington's comparative economic strength within the North West, the authority has not been immune to the wider recessionary pressures. While there was a decrease in the number of new businesses created in Warrington between 2008 and 2009 (-10.7%), the authority preformed better in terms of a reduction in entrepreneurial activity compared to the North West (-12.9%) and England as a whole (-11.6%). However, Warrington experienced a greater increase in business deaths between 2008 and 2009 (35.5%) than the North West (28.5%) and England as a whole (27.1%).

3 Analysis of the Existing Employment Situation

Review of Previous Studies

Warrington Annual Employment Availability Statement

The latest report sets out Warrington Borough Council's position statement regarding the take up and supply of land for employment development within the borough as at the 1st April 2011.

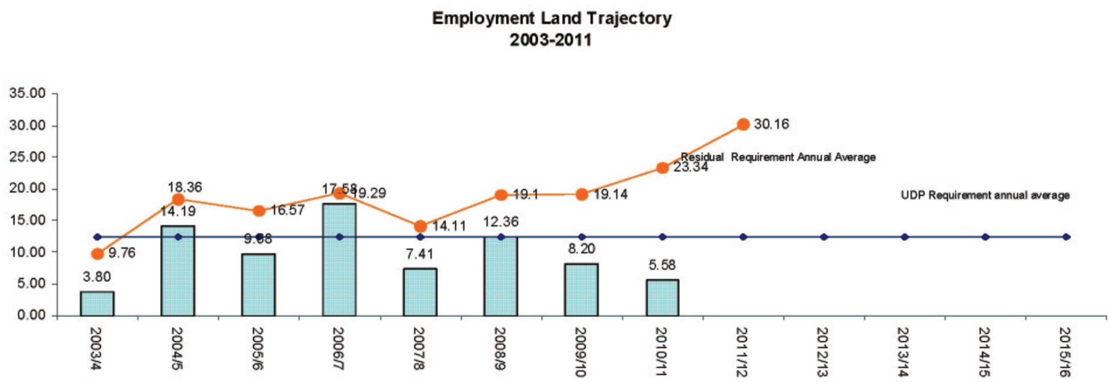
The main purpose of the annual review of Employment Land is to inform and monitor the employment land policies as contained in the Adopted Warrington Unitary Development Plan (UDP) 2006.

In addition to informing the statutory planning process, the report is also intended to meet the requirements of the audience in the wider development community by including information on floorspace, use class and development type, in addition to the basic site area information required for policy monitoring. The report provides a general indication that take up rates have been healthy for the past 10 years and that the Council is on target to achieve planned provision for employment land until 2016.

Requirement and Past Take Up

Policy EMP1 of Warrington UDP sets a requirement to make provision for up 310ha of land for business, general industrial storage/distribution uses over the period 1996-2016, to support the sustainable growth of the local economy. Historically, the method of calculating forward supply has been to project forward previous take up rates and allow for an additional 20% allowance.

The trajectory below indicates that the take up of employment land has generally been consistent to date. From 2003-2011 the total committed and identified supply currently stands at 233.23ha.



Picture 3.1 Employment Land Trajectory 2003 - 2011

North West Regional Economic Strategy - NWDA - 2006

The NWDA Regional Economic Strategy was published in 2006 and its primary vision was to create a dynamic, sustainable international economy which competes on the basis of knowledge, advanced technology and an excellent quality of life for all. Its three major drivers are to improve productivity and grow the market, increase the size and capability of the workforce and ensure conditions for sustainable growth.

Beneath these are a number of objectives which include the delivery of high quality employment sites and premises, securing new uses for brownfield land, and developing growth opportunities around Warrington. The report identified Omega South in Warrington as a Strategic Regional Site.

Analysis of the Existing Employment Situation

North West Regional Assembly: Regional Employment Land Study- July 2005

The study formed part of the evidence base to inform the preparation of the RSS. The assessment was undertaken at both regional and sub-regional scale and Cheshire and Warrington formed one sub region.

Cheshire and Warrington represent the largest area of employment sites in any of the North West sub-regions. Analysis of market interest within the sub-region shows that the sites with greatest market attraction are concentrated in the central north-south axis. The majority of the sites in Cheshire and Warrington that score well in terms of market and availability, are located within Warrington. Almost 70% of sites in Cheshire and Warrington are available within the next three years. This is the highest sub-regional proportion in the region.

The report recommended that provision be made within each sub-region for an 18 year forward supply of employment sites (covering the RSS plan period 2006 to 2021) to meet likely gross take up rates, incorporating an additional allowance for flexibility and choice.

The overall regional stock of committed/allocated sites relative to the average annual take up rate of employment land would last approximately 19 years, which would be slightly higher than the 18 year period the RSS should be planning for. The total supply relative to past take up rates was highest in Cheshire and Warrington and Cumbria, and lowest in Greater Manchester.

If the Regional Spatial Strategy plans to replicate current rates, there would be a need to identify additional employment sites, particularly in Greater Manchester, for delivery towards the end of the plan period.

Cheshire and Warrington Economic Review and Forecasts August 2007

The study further reinforced that Cheshire & Warrington is one of the most successful sub-regions in the UK. Gross Value Added (GVA) per capita has consistently stood higher than the UK average, household earnings have been high, the population is highly skilled and unemployment is low. In addition, the natural environment combined with such factors as high educational attainment mean that Cheshire & Warrington is a place where people want to live, and where residents enjoy a high quality of life.

In October 2004, CWEA published, ‘Investing in Success’, the sub-regional economic strategy for Cheshire & Warrington. The strategy acknowledged the success of Cheshire & Warrington, and provided a framework for maintaining that success for the years to come.

Whilst Cheshire and Warrington currently has a very successful economy, key findings of the report indicated that:

- The working age population in the 20-39 age range is declining faster than the UK average and faster than the rest of the North West.
- The household income of Cheshire and Warrington residents is growing faster than the UK average but the people who work here are experiencing a much slower growth in earnings.
- Mid-Cheshire is missing out on economic growth with insufficient growth in higher paid jobs leading to residents travelling out of the area to jobs in Liverpool and Manchester.

Cheshire and Warrington Employment Land and Sites Study 2009

Cheshire and Warrington Economic Alliance (CWEA) now known as Cheshire and Warrington Enterprise Commission (CWEC), with partner organisations, commissioned consultants in July 2008 to carry out a study to identify the current position in relation to employment land and sites across the sub region. In the context of ensuring the continued economic growth of the sub-region. The review identified existing and proposed land and site allocations for the purposes of strategic prioritisation. Data was collated on stocks of sites to provide a realistic overview of their deliverability, attractiveness to investors and appropriateness for target sectors. The study made an assessment of their potential for development and prioritised them in a strategic context at a sub-regional level. Further details of the key findings of this report and future work required is outlined in section 5.

Local Economic Assessment (LEA)

The Council's Local Economic Assessment was approved at Executive Board in March 2010.

The LEA is a factual assessment of the economic conditions and economic information for an area which should be used to inform future strategies and policies of the Local Authority. The LEA uses statistical data and information such as the recently updated Centre for Cities 2011 report to identify key aspects of the borough's economy. The main assessment, or "Story of Place" has an Executive Summary and the full set of data used in the document is set out in a comprehensive statistical annex.

The Local Economic Assessment has been produced alongside those in Cheshire East and Cheshire West and Chester, so that sub-regional picture can be pieced together when all local authority documents are complete.

The key findings in relation to Business, Enterprise and Economic Growth are:

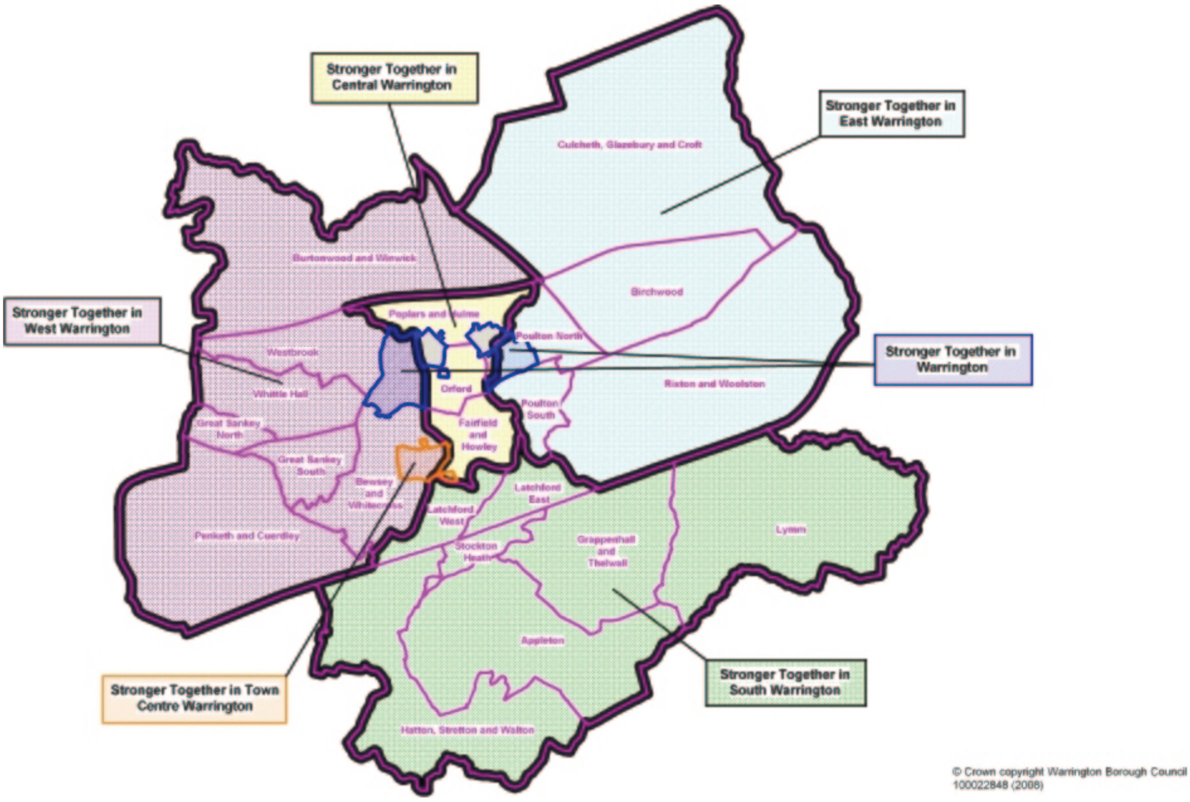
- **Warrington is a successful location:** Warrington is home to the headquarters of a number of significant companies. In 2008, 8,033 businesses were recorded employing 115,418 people, a 19% rise from the previous decade.
- **Warrington's economy has changed significantly:** Manufacturing in Warrington now only represents 7.6% of employment and has continued to contract despite already being below the national average. There is still a high proportion of employment compared to the average for England in chemicals and basic metals and Warrington also has a relatively high proportion of employment in energy related businesses, water supply, civil engineering and architecture; telecommunications and employment/business services. Business services are the largest employment sector and other key sectors are distribution, hotels and restaurants followed by the public sector which despite recent growth is at a level which is no greater than the national average.
- **Warrington currently performs well at the national and regional level:** Levels of Gross Value Added (GVA) in Warrington and Halton (the lowest area classification) are currently higher per head than the UK average. Whilst growth in GVA over the last decade was higher than the North West region it was lower than the average for England. If this continues Warrington's GVA per head will eventually be surpassed by that of the UK.
- **Warrington has good physical connectivity:** The success of Warrington continues to be driven by accessibility. Both in and out commuting is at a relatively high level with the majority using car transport. Whilst motorways and ManchesterAirport have played a significant role in attracting company investment, the excellent rail networks have to date been underplayed. Direct rail connections to most UK cities and regular access to London in 1 hour 50 minutes means that Warrington town centre can be considered better connected than almost any other in the UK.
- **Warrington has lots of warehousing and has the potential to strengthen its office offer:** Of all commercial floor space available in Warrington, warehousing takes up the most space, reinforcing the importance of the distribution sector to the local economy. In terms of overall commercial and industrial floor space, the proportion of factory space has diminished dramatically since 2005. This reflected a number of legacy industrial sites making way for new residential developments. Warrington has a marginally below average share of office accommodation and additional office space has only grown fractionally over recent years.

- **Warrington's housing growth is linked to its economic success:** In common with the rest of the UK, house prices have increased in Warrington. Affordability is not as severe an issue as across some neighbouring authorities (particularly in Cheshire East and Cheshire West & Chester) and housing stock has increased considerably over the last 5 years. Maintaining a level of housing completions of at least that set out in the Development Plan is likely to be an important driver of the Warrington economy over the next two decades. As social and demographic changes result in average household sizes diminishing, and as current residents retire, it is likely that Warrington will need a significant increase in housing to maintain the current working population.
- **Warrington faces significant sustainability challenges:** The New Town masterplan created many challenges for Warrington in terms of reducing its carbon footprint. Locations such as Birchwood, whilst making a very important contribution to the Borough's economy, also stimulate the highest level of travel to work car movements and the longest car journeys. Despite the New Town masterplan placing a reliance on car transport, the proportion of emissions generated by transport (excluding motorways) within Warrington was estimated at only 19% compared to a national average for transport of 24% of emissions.

4 Key Business & Employment Data

Employees by Sector within Key Warrington Employment Areas

The following series of tables briefly illustrate the number and percentage of employees located in Warrington as a whole, and within the individual neighbourhood areas. In sectors where low employee numbers may be disclosive, figures have been rounded.



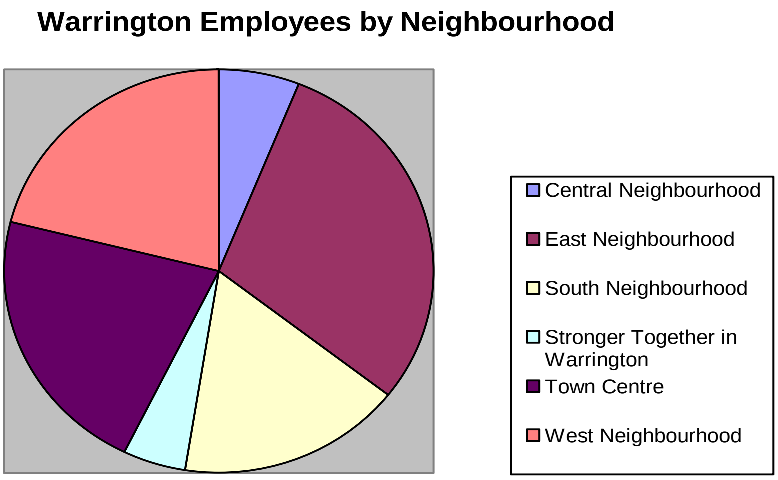
Picture 4.1 Warrington Stronger Together Neighbourhoods

Key Business & Employment Data

Warrington Employees by Neighbourhood: All Sectors 2009

	Employment	
Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of all Warrington Employees
Central Neighbourhood	**6,851**	**6.1%**
East Neighbourhood	**33,017**	**29.4%**
South Neighbourhood	**19,310**	**17.2%**
Stronger Together In Warrington	**5,101**	**4.5%**
Town Centre	**24,279**	**21.6%**
West Neighbourhood	**23,866**	**21.2%**
Total	**112,424**	**100%**

Table 11 Number & Percentage of Employees in Warrington



The above table provides the number and percentage of employees by geographic area in Warrington. The table indicates the Warrington East Neighbourhood contains the highest percentage of employees (29.4%), while the geographic area with the lowest percentage of employees is the Stronger Together in Warrington area (4.5%).

Agriculture, Forestry & Fishing

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	0	0%
East Neighbourhood	0	0%
South Neighbourhood	0	0%
Stronger Together In Warrington	0	0%
Town Centre	0	0%
West Neighbourhood	0	0%

Table 12 Agriculture, Forestry & Fishing Employees

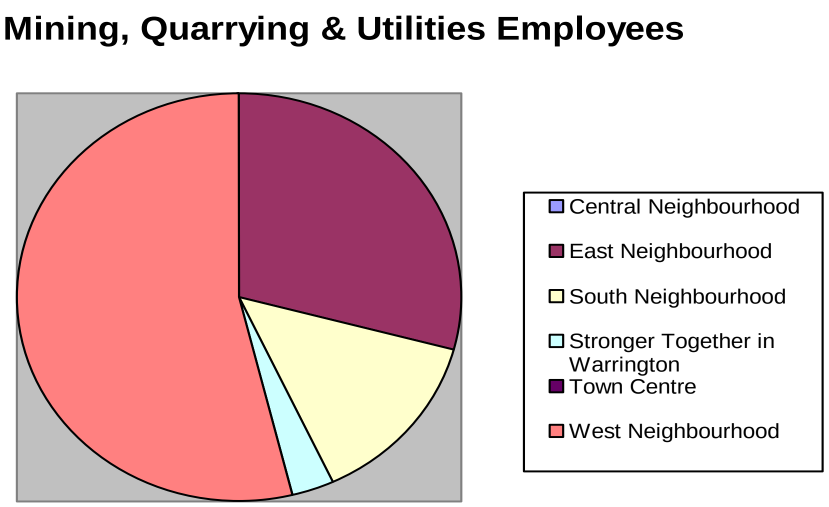
The number of individuals employed in the agricultural, forestry and fishing sectors in Warrington is nominal. The agriculture figures in the above table exclude farm agriculture.

Key Business & Employment Data

Mining, Quarrying & Utilities

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	0	0%
East Neighbourhood	333	1.0%
South Neighbourhood	158	0.8%
Stronger Together In Warrington	35	0.7%
Town Centre	0	0%
West Neighbourhood	618	2.5%

Table 13 Mining, Quarrying & Utilities Employees

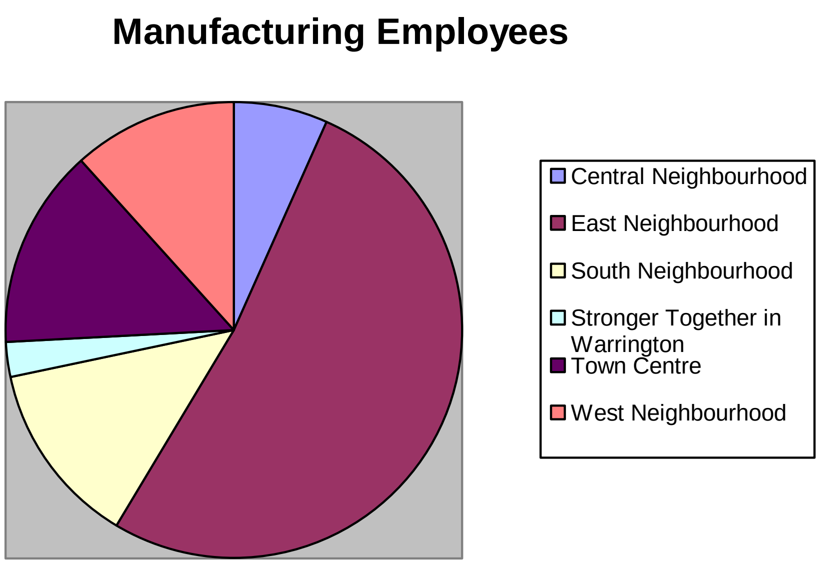


There are a limited number employees working in the mining, quarrying and utilities sectors throughout the borough. The majority are located within the west neighbourhood, with the balance working in the east, south and Stronger Together in Warrington neighbourhoods. There are no employees from this sector located in either the central neighbourhood or the town centre.

Manufacturing

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	**512**	**7.5%**
East Neighbourhood	**3,957**	**12.0%**
South Neighbourhood	**984**	**5.1%**
Stronger Together In Warrington	**200**	**3.9%**
Town Centre	**1,078**	**4.4%**
West Neighbourhood	**884**	**3.7%**

Table 14 Manufacturing Employees

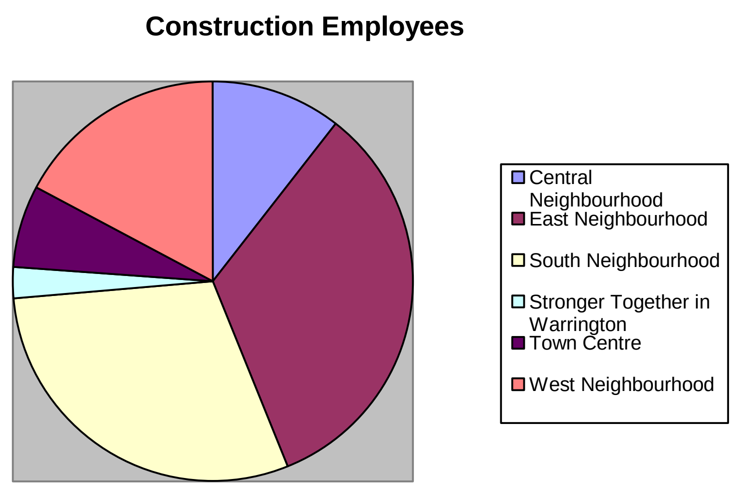


Warrington's manufacturing employees are distributed throughout the borough, with the east neighbourhood containing the majority of the the sector's overall employees.

Construction

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	815	11.9%
East Neighbourhood	2,546	7.7%
South Neighbourhood	2,294	11.9%
Stronger Together In Warrington	191	3.7%
Town Centre	508	2.1%
West Neighbourhood	1,325	5.6%

Table 15 Construction Employees

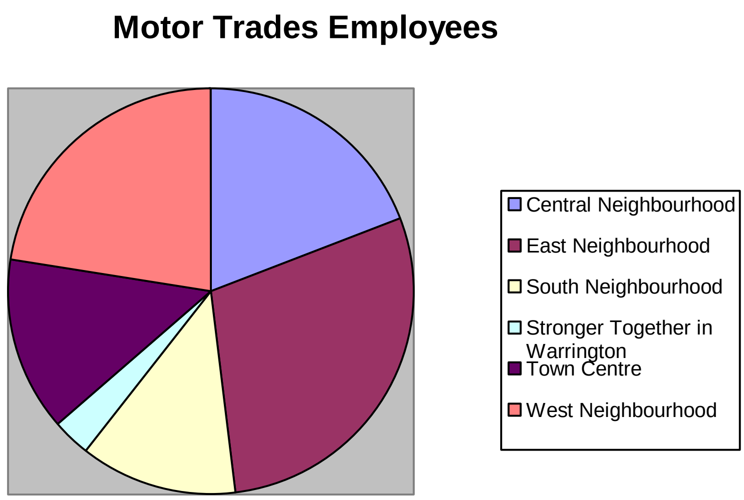


Construction employees are again distributed throughout the borough, with the majority located within the east and the south neighbourhoods.

Motor Trades

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	**408**	**6.0%**
East Neighbourhood	**611**	**1.9%**
South Neighbourhood	**262**	**1.4%**
Stronger Together In Warrington	**65**	**1.3%**
Town Centre	**296**	**1.2%**
West Neighbourhood	**474**	**2.0%**

Table 16 Motor Trades Employees

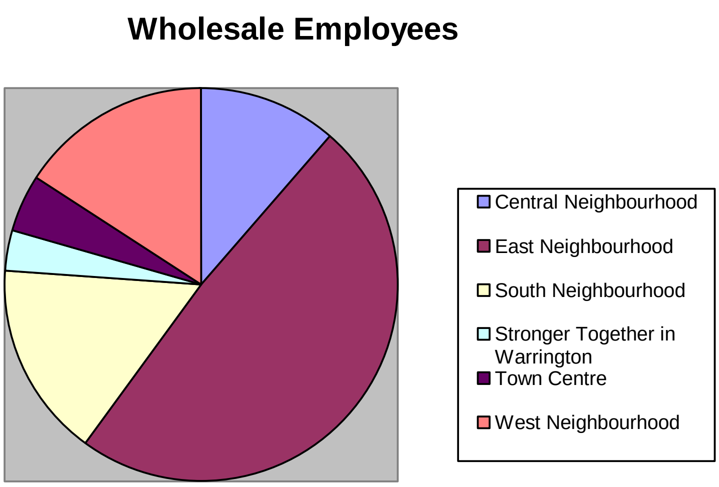


Whilst the east neighbourhood contains the highest absolute number of motor trade employees, the sectoral share of employees in the motor trades is highest in the central neighbourhood.

Wholesale

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	659	9.6%
East Neighbourhood	2,779	8.4%
South Neighbourhood	918	4.8%
Stronger Together In Warrington	187	3.7%
Town Centre	267	1.1%
West Neighbourhood	913	3.8%

Table 17 Wholesale Employees

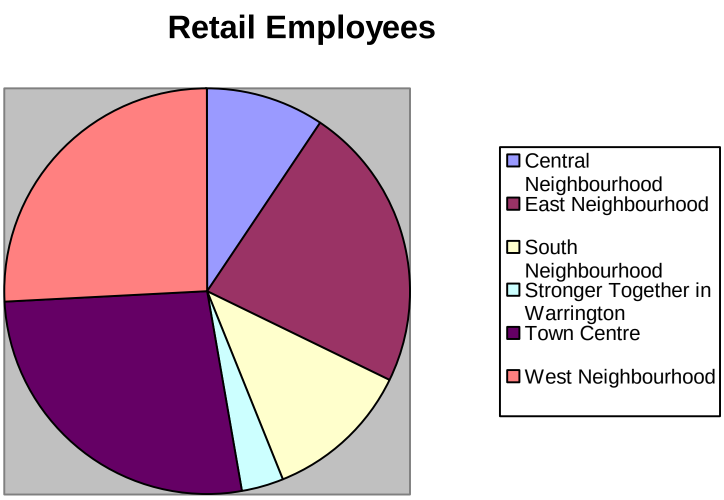


The majority of employees working the wholesale trades are located within the east neighbourhood, with a high share of employees also working within the south and west neighbourhoods.

Retail

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	1,060	15.5%
East Neighbourhood	2,542	7.7%
South Neighbourhood	1,300	6.7%
Stronger Together In Warrington	393	7.7%
Town Centre	2,991	12.3%
West Neighbourhood	2,906	12.2%

Table 18 Retail Employees



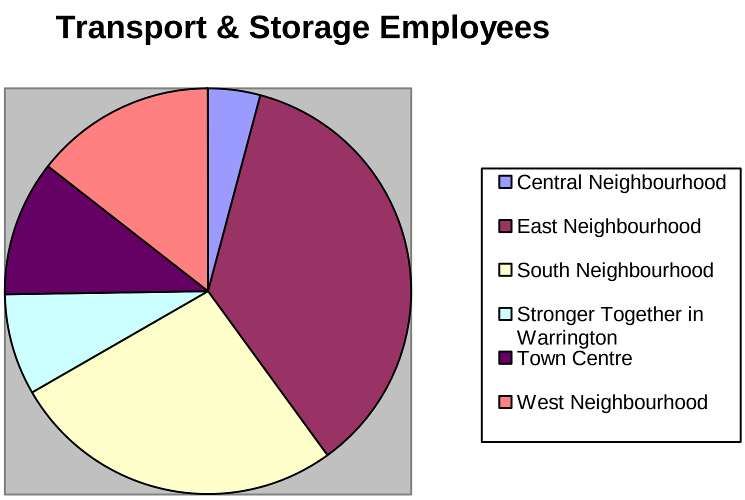
High numbers of retail employees are concentrated in Warrington's town centre and within the east and west neighbourhoods. Large retail businesses located at Gemini Retail Park account for the majority of retail employee numbers in the west neighbourhood.

Key Business & Employment Data

Transport & Storage

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	276	4.0%
East Neighbourhood	2,422	7.3%
South Neighbourhood	1,801	9.3%
Stronger Together In Warrington	542	10.6%
Town Centre	725	3.0%
West Neighbourhood	975	4.1%

Table 19 Transport & Storage Employees

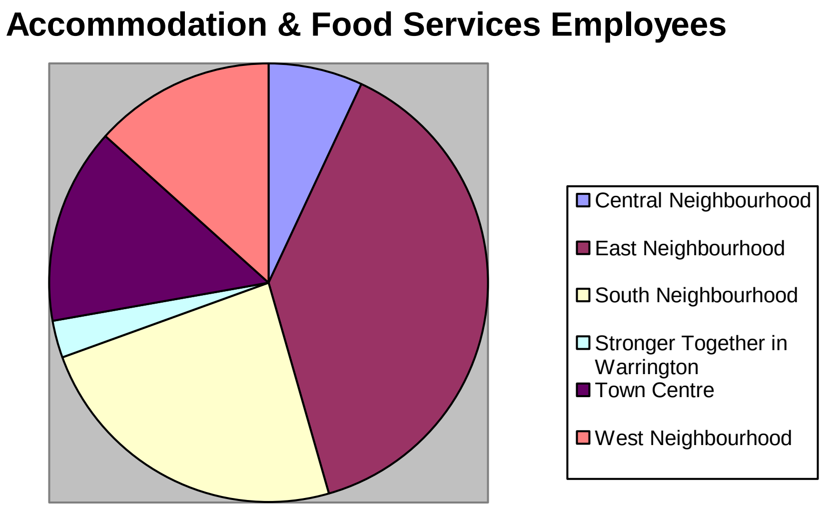


A growing sector in the borough, transport and storage businesses employ individuals throughout Warrington, with the highest concentrations recorded in the east and south neighbourhoods.

Accommodation & Food Services

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	474	6.9%
East Neighbourhood	2,617	7.9%
South Neighbourhood	1,614	8.4%
Stronger Together In Warrington	184	3.6%
Town Centre	994	4.1%
West Neighbourhood	895	3.8%

Table 20 Accommodation & Food Employees

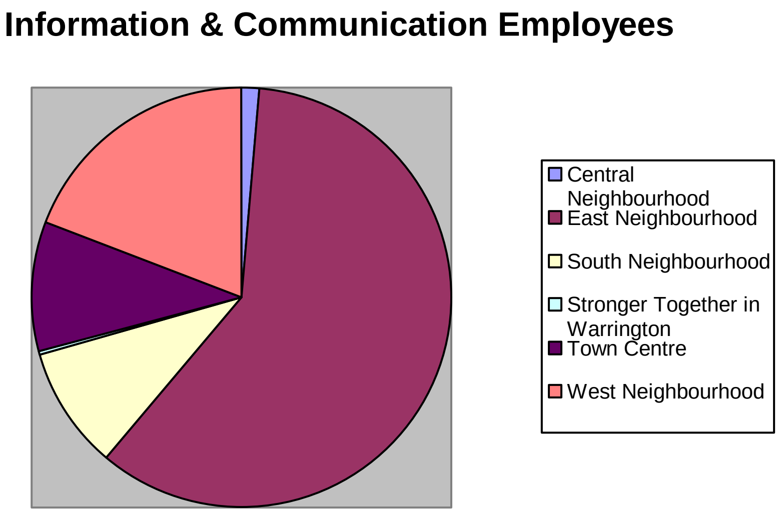


Accommodation and food service employees are located in all areas of the borough, the highest number of which are contained in the east neighbourhood, closely followed by the south neighbourhood.

Information & Communication

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	81	1.2%
East Neighbourhood	3,258	9.8%
South Neighbourhood	513	2.7%
Stronger Together In Warrington	20	0.4%
Town Centre	541	2.2%
West Neighbourhood	1,045	4.4%

Table 21 Information & Communication Employees

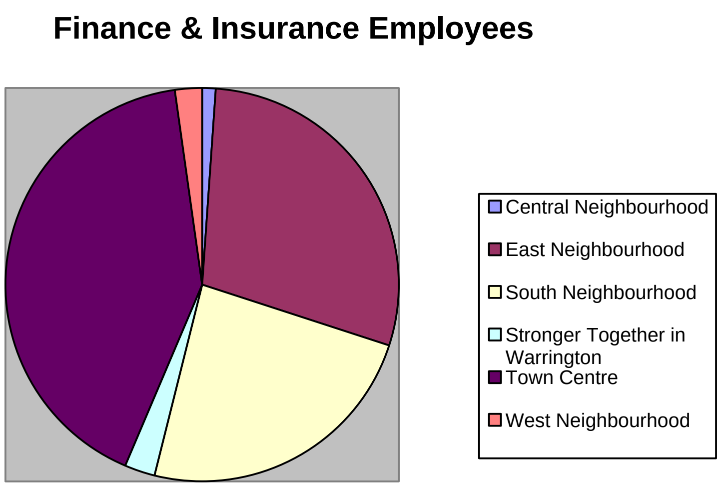


High numbers of information and communication employees are located in the east neighbourhood. The west neighbourhood also records reletively high employee numbers. By contrast, few employees in this sector work in the central neighbourhood or the Stronger Together in Warrington area.

Finance & Insurance

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	23	0.3%
East Neighbourhood	667	2.0%
South Neighbourhood	542	2.8%
Stronger Together In Warrington	59	1.2%
Town Centre	946	4.0%
West Neighbourhood	53	0.2%

Table 22 Finance & Insurance Employees

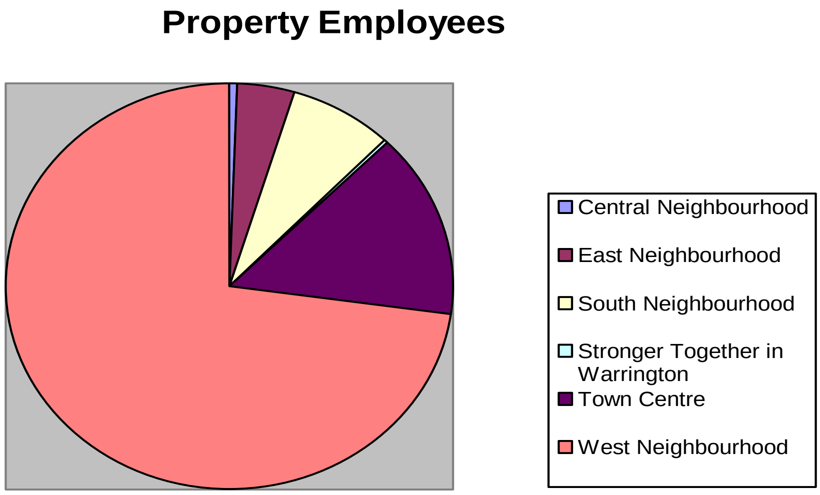


There are a comparatively low number of finance and insurance sector employees overall in Warrington, with the highest concentration of workers located primarily in the town centre.

Property

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	22	0.3%
East Neighbourhood	128	0.4%
South Neighbourhood	238	1.2%
Stronger Together In Warrington	13	0.3%
Town Centre	462	1.9%
West Neighbourhood	2,315	9.7%

Table 23 Property Employees

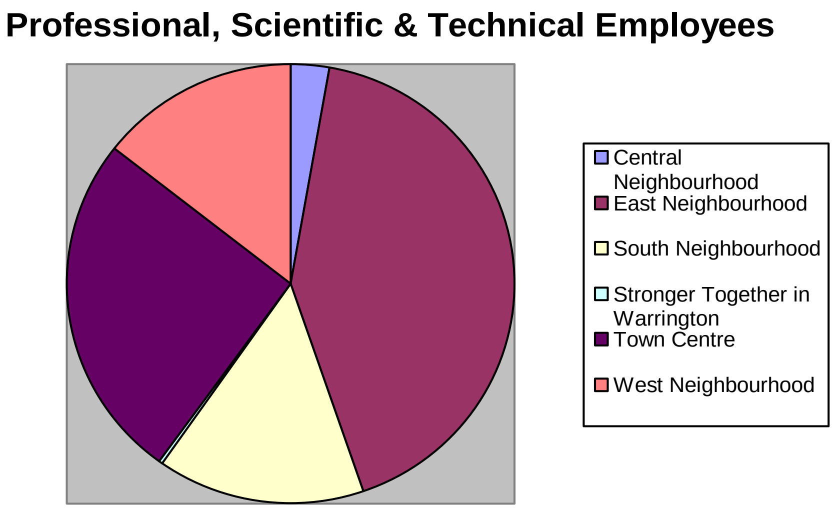


Whilst there are a proportionately low number of employees working in the property sector in the majority of neighbourhoods in Warrington, the west neighbourhood differs significantly from this trend, accounting for a significantly higher number than elsewhere in the borough.

Professional, Scientific & Technical

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	281	4.1%
East Neighbourhood	4,148	12.6%
South Neighbourhood	1,487	7.7%
Stronger Together In Warrington	54	1.1%
Town Centre	2,511	10.3%
West Neighbourhood	1,447	6.1%

Table 24 Professional, Scientific & Technical Employees

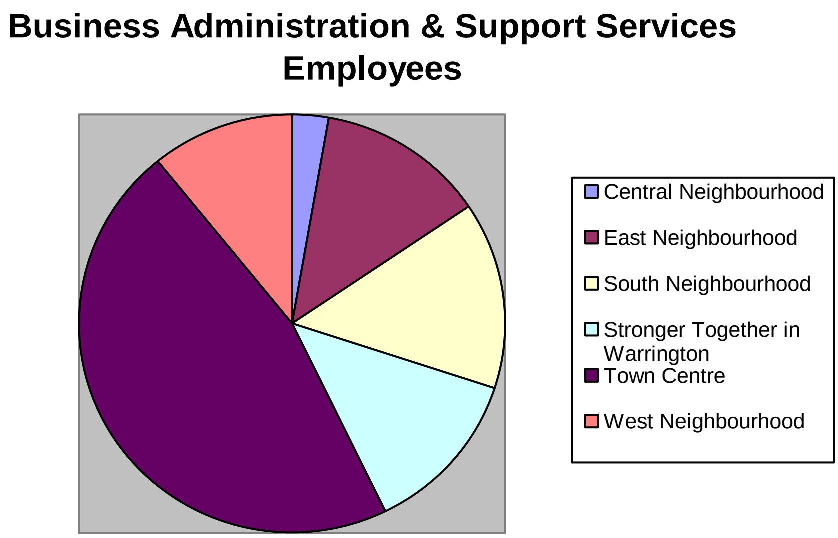


Professional, scientific and technical employment is significant outside the central neighbourhood and the Stronger Together in Warrington area. Employment levels are highest in the east neighbourhood. The Town Centre is also a growing source of professional, scientific and technical employees.

Business Administration & Support Services

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	353	5.2%
East Neighbourhood	1,718	5.2%
South Neighbourhood	1,947	10.1%
Stronger Together In Warrington	1,691	33.2%
Town Centre	6,209	25.6%
West Neighbourhood	1,439	6.0%

Table 25 Business Administration & Support Services Employees

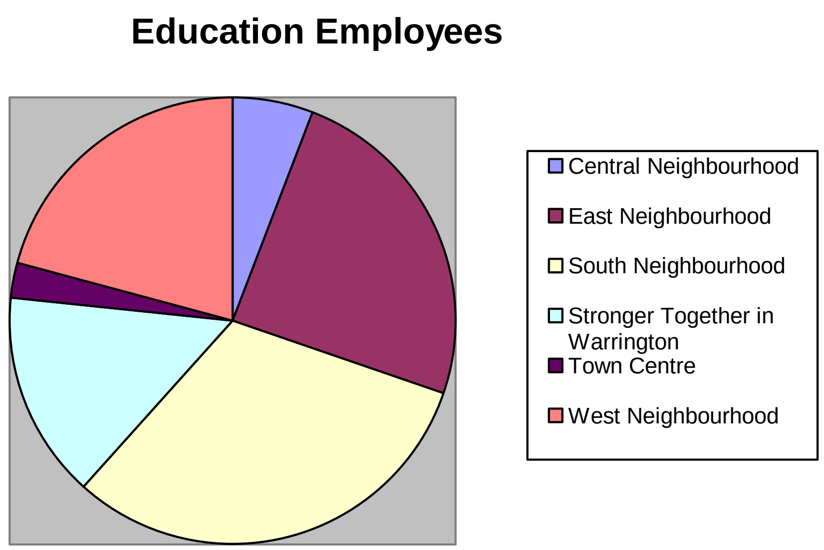


Business administration and support service employees are distributed throughout Warrington, with the highest proportion located in the town centre. Whilst the overall number of employees in this sector is much lower in the Stronger Together in Warrington area, it is the dominant employment type in this area representing 33.2% of all employees.

Education

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	**433**	**6.3%**
East Neighbourhood	**1,801**	**5.5%**
South Neighbourhood	**2,332**	**12.1%**
Stronger Together In Warrington	**1,093**	**21.4%**
Town Centre	**196**	**0.8%**
West Neighbourhood	**1,535**	**6.4%**

Table 26 Education Employees

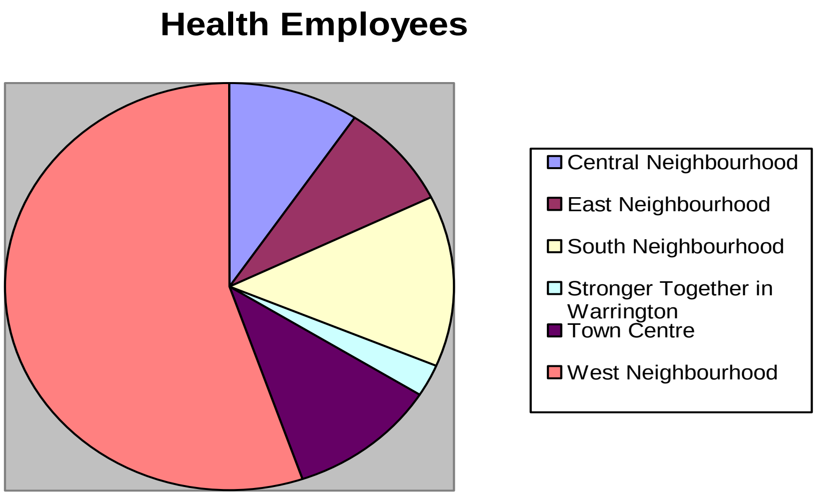


Education employees are generally located throughout the borough with the highest proportion located in the south neighbourhood. This sector also forms a significant portion of employment in the Stronger Together in Warrington area, representing 21.4% of all employees in the locality. By contrast, the town centre's mix of employees contains very few employees in the education sector (0.8%).

Health

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	**1,069**	**15.6%**
East Neighbourhood	**950**	**2.9%**
South Neighbourhood	**1,550**	**8.0%**
Stronger Together In Warrington	**281**	**5.5%**
Town Centre	**1,266**	**5.2%**
West Neighbourhood	**6,291**	**26.4%**

Table 27 Health Employees

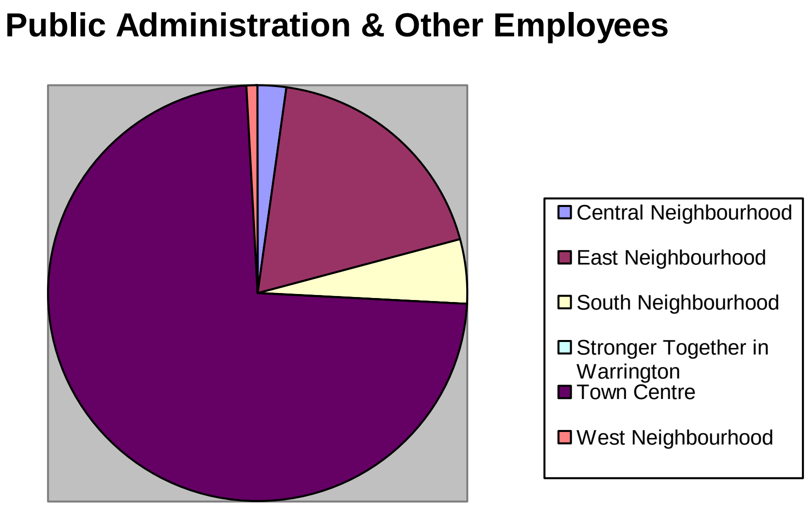


A significant majority of Warrington's health sector employees are located in the west neighbourhood area. The health sector also accounts for a high proportion of overall employees in the central area and the west neighbourhood.

Public Administration & Defence

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	132	1.9%
East Neighbourhood	1,099	3.3%
South Neighbourhood	294	1.5%
Stronger Together In Warrington	0	0%
Town Centre	4,302	17.7%
West Neighbourhood	46	0.2%

Table 28 Public Administration & Defence Employees

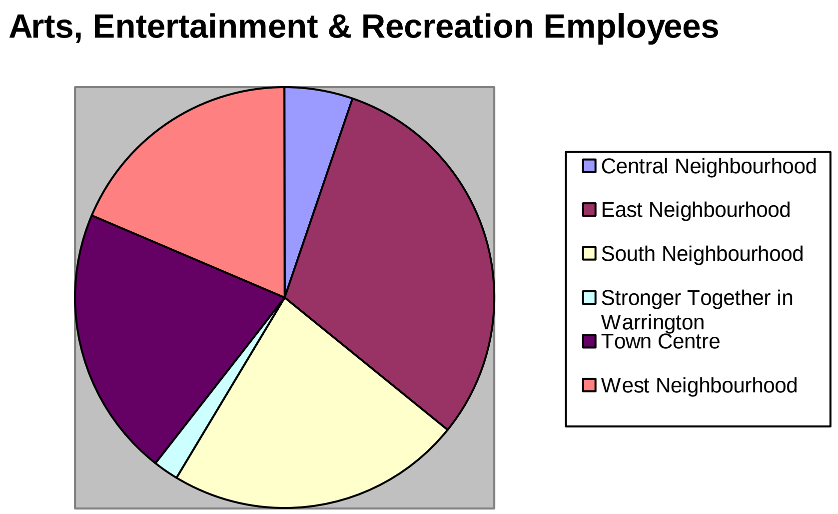


Workers employed in public administration and defence occupations are principally located in the town centre. This sector also accounts for a large proportion of overall employment in the town centre (17.7%).

Arts, Entertainment & Recreation

Geographical Area (Stronger Together Super Output Areas)	Absolute Number	As a % of Neighbourhood's Employees
Central Neighbourhood	250	3.6%
East Neighbourhood	1,440	4.4%
South Neighbourhood	1,076	5.6%
Stronger Together In Warrington	93	1.8%
Town Centre	978	4.0%
West Neighbourhood	884	3.7%

Table 29 Arts, Entertainment & Recreation Employees



4.1 The majority of employees working in the arts, entertainment and recreation sector are located across the east, south and west neighbourhoods and the town centre. The east neighbourhood contains the highest absolute number of employees in this sector whereas relatively low numbers are recorded in the Stronger Together in Warrington area.

Warrington and the Sub Region

The following section provides an indication of the absolute number of employees in each economic sector, in both Warrington and the local authorities that surround it. The section also presents the percentage of employees in each economic sector for every authority. This data is drawn from the Business Register and Employment Survey - 2009. In sectors where low employee numbers may be disclosive, figures have been rounded. Farm agriculture is excluded from agriculture, forestry and fishing sectoral data.

Number and percentage of employees all industries in 2009

	Agriculture, forestry & fishing		Mining, quarrying & utilities		Manufacturing		Construction		Motor trades	
	No	%	No	%	No	%	No	%	No	%
Cheshire East	729	0.5%	2,539	1.5%	20,499	12.5%	7,003	4.3%	3,353	2.0%
Cheshire West & Chester	131	0.1%	991	0.7%	15,003	10.3%	6,122	4.2%	3,430	2.4%
Halton	0	0%	528	1.1%	9,037	18.0%	2,317	4.6%	738	1.5%
Knowlsey	28	0.1%	554	1.0%	10,638	19.4%	2,763	5.0%	531	1.0%
St Helens	0	0%	328	0.6%	6,013	10.1%	5,039	8.5%	1,109	1.9%
Warrington	**0**	**0%**	**1,152**	**1.0%**	**7,616**	**6.8%**	**7,678**	**6.8%**	**2,116**	**1.8%**
Wigan	57	0.1%	634	0.6%	12,974	13.2%	7,082	7.2%	1,642	1.7%

Table 30 Number and Percentage of Employees all Industries in Warrington & the Sub Region

	Wholesale		Retail		Transport & Storage		Accommodation & Food Services		Information & Communication	
	No	%	No	%	No	%	No	%	No	%
Cheshire East	6,480	3.9%	17,176	10.4%	7,456	4.5%	10,856	6.6%	6,344	3.8%
Cheshire West & Chester	3,899	2.7%	18,512	12.7%	4,526	3.1%	11,529	7.9%	3,035	2.1%
Halton	3,900	7.8%	4,107	8.2%	4,032	8.0%	2,617	5.2%	3,400	6.8%
Knowsley	1,613	2.9%	5,310	9.7%	2,344	4.3%	1,697	3.1%	1,346	2.5%
St Helens	2,088	3.5%	6,517	11.0%	4,885	8.2%	4,004	6.7%	835	1.4%
Warrington	**5,724**	**5.1%**	**11,192**	**10.0%**	**6,741**	**6.0%**	**6,778**	**6.0%**	**5,458**	**4.9%**
Wigan	3,906	4.0%	12,609	12.8%	4,227	4.3%	5,598	5.7%	1,254	1.3%

Table 31 Number and Percentage of Employees in all Industries in Warrington & the Sub Region

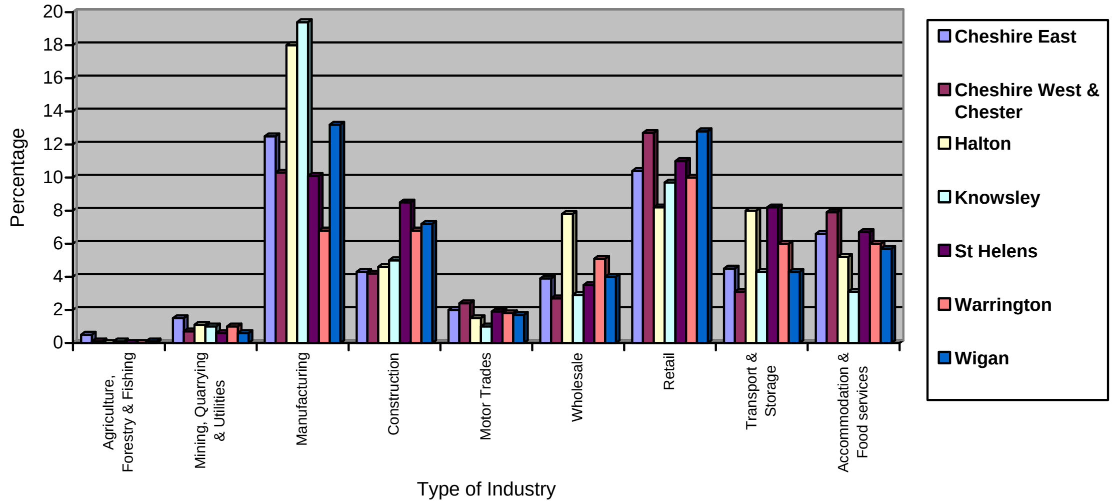
	Finance & Insurance		Property		Professional, Scientific & Technical		Business Administration & Support Services	
	No	%	No	%	No	%	No	%
Cheshire East	7,625	4.6%	2,721	1.7%	15,672	9.5%	9,293	5.6%
Cheshire West & Chester	12,494	8.6%	2,177	1.5%	9,580	6.6%	9,904	6.8%
Halton	736	1.5%	628	1.3%	3,818	7.6%	2,886	5.7%
Knowsley	1,519	2.8%	508	0.9%	1,113	2.0%	3,747	6.8%
St Helens	1,080	1.8%	758	1.3%	2,566	4.3%	4,432	7.5%
Warrington	**2,289**	**2.0%**	**2,998**	**2.7%**	**9,929**	**8.8%**	**13,356**	**11.9%**
Wigan	1,569	1.6%	1,255	1.3%	4,166	4.2%	9,212	9.4%

Table 32 Number and Percentage of Employees in all Industries in Warrington & the Sub Region

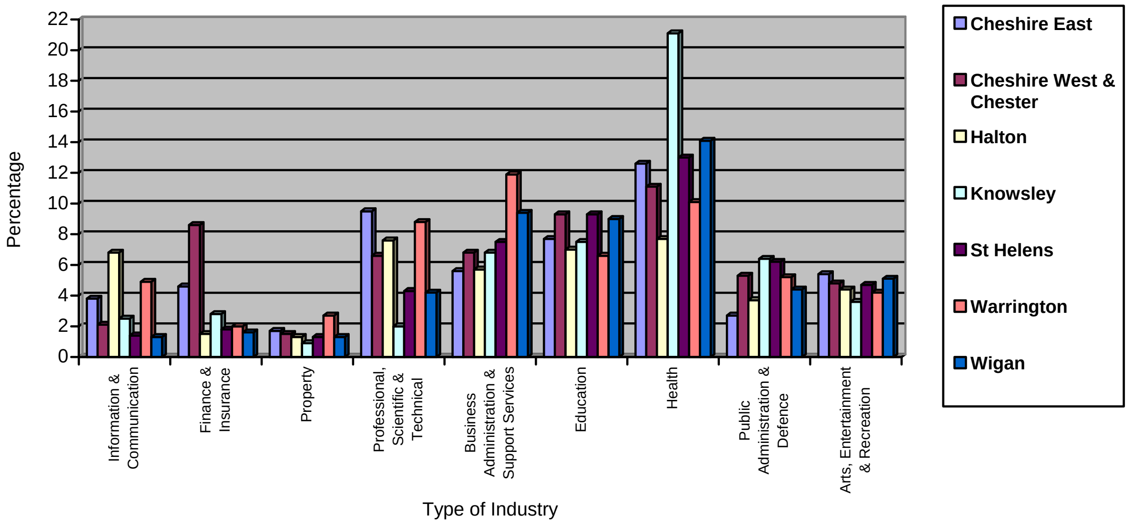
	Education		Health		Public Administration & Defence		Arts Entertainment & Recreation	
	No	%	No	%	No	%	No	%
Cheshire East	12,748	7.7%	20,692	12.6%	4,494	2.7%	8,956	5.4%
Cheshire West & Chester	13,557	9.3%	16,232	11.1%	7,737	5.3%	6,971	4.8%
Halton	3,497	7.0%	3,888	7.7%	1,879	3.7%	2,217	4.4%
Knowsley	4,109	7.5%	11,561	21.1%	3,533	6.4%	1,949	3.6%
St Helens	5,548	9.3%	7,719	13.0%	3,672	6.2%	2,772	4.7%
Warrington	**7,390**	**6.6%**	**11,407**	**10.1%**	**5,875**	**5.2%**	**4,721**	**4.2%**
Wigan	8,856	9.0%	13,889	14.1%	4,319	4.4%	5,020	5.1%

Table 33 Number and Percentage of Employees in all Industries in Warrington & the Sub Region

Percentage of Employees in all Industries in the Sub Regional Authorities



Percentage of Employees in all Industries in the Sub Regional Authorities

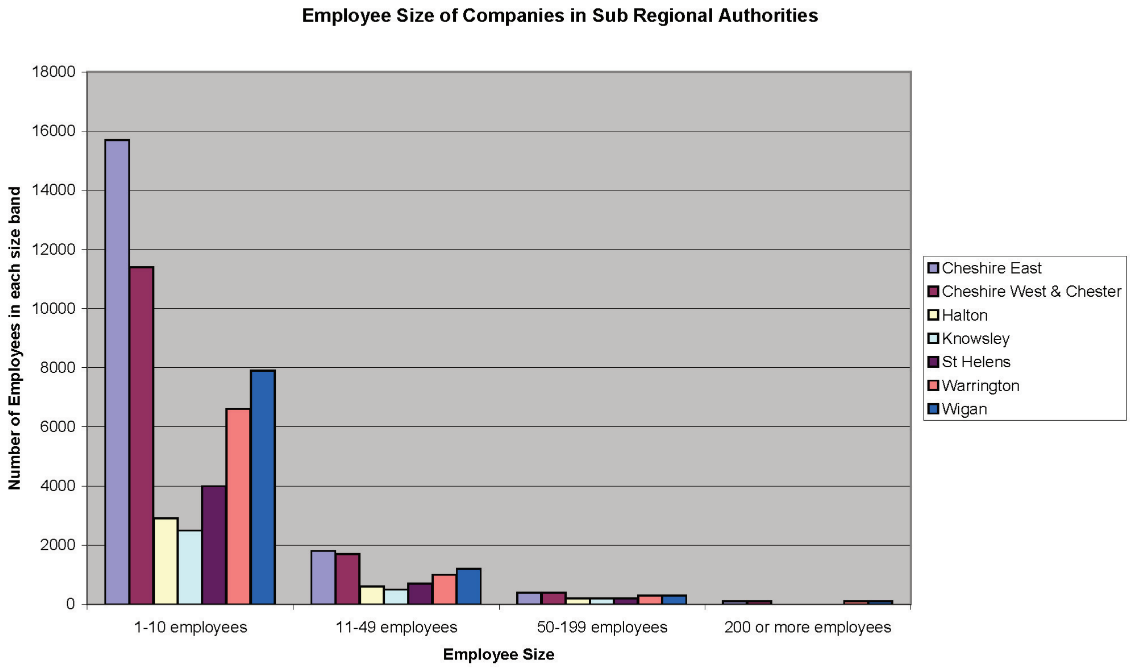


The tables and bar charts above indicate that the business administration & support services (11.9%), health (10.1%), and retail (10%) sectors have the highest proportion of all employees in Warrington, cumulatively accounting for 32% of employees overall. A similar picture is evident in the wider region in terms of health and retail. It is noticeable that manufacturing businesses represent a significant proportion of the workforce consistently throughout the region but this pattern is not replicated in Warrington with the sector only accounting for 6.8% of employees.

Employment Band

Area	1-10 employees	11-49 employees	50-199 employees	200 or more employees
Cheshire East	15,700	1,800	400	100
Cheshire West & Chester	11,400	1,700	400	100
Halton	2,900	600	200	0
Knowsley	2,500	500	200	0
St Helens	4,000	700	200	0
Warrington	6,600	1,000	300	100
Wigan	7,900	1,200	300	100
North West	213,700	31,800	8,000	1,800

Table 34 Employment Size of Companies in the Sub Regional Authorities



Picture 4.2 Employee size of Companies in Sub Regional Authorities

In relation to the size of the companies by the number of employees, it is evident from the above table and graph that there are a significant number of small businesses within Warrington and the sub region as a whole, particularly Cheshire East and Cheshire West & Chester. This indicates a high proportion of entrepreneurial businesses in the borough and the sub region. The number of companies with 200 or more employees represents 1.25% of the total number of companies in Warrington therefore reinforcing the importance of the smaller entrepreneurial business sector in the borough.

5 Cheshire and Warrington Sub Regional Employment Land and Site Study 2009

5.1 The intention of the study was to assess and identity sub-regionally significant employment land and sites in Cheshire and Warrington. It also provided a number of valuable statistics and references which further reinforces the evidence already gathered with Warrington's Employment Land Review.

Key Conclusions of the Study

5.2 The study outlined significant strategic regional sites and sub regional sites with strategic development potential. These are outlined below:

Regional Sites

- Basford East and West (Crewe)
- Omega and Central Warrington (Waterfront area)
- Chester Business Park and Chester Rail Gateway (Chester)
- Alderley Park, Macclesfield

Sub Regional Sites

- Cheshire Oaks, Ellesmere Port
- Lostock Triangle, Northwich
- South of Bostock Road, Winsford
- The Countess of Chester Hospital, Chester
- East of Quakers Coppice, Crewe
- CreweTown Centre Redevelopment
- Capenhurst, Chester
- Crewe Rail Gateway, Crewe
- Birchwood Park Parcel 7, Warrington
- Midpoint 18 Middlewich
- Crewe Business Park/Crewe Green

5.3 The study also identified other important sites in the sub region which have key attributes which highlight them as important sites across the sub-region. These included Woolston Grange in Warrington, 1MU Site in Wilmslow/Macclesfield and PioneerPark in EllesmerePort.

Birchwood Park, Parcel 7

5.4 The study identified Birchwood as an established business location with a strong concentration of high-value sectors. Within Parcel 7, there are a total of five sites. Across the sites there are outline planning applications for ten office buildings with car parking and a business park for B1 (office and R&D) B2, B8 with ancillary A1,A3. Outline planning application for those remaining sites illustrate demand from the market. The opportunity exists to deliver further high-value employment space on the remaining parcels. These developments are deliverable without public sector intervention, close to areas of deprivation and regarded by the market as attractive. In an improved economy it is likely that the market will deliver Parcel 7 independently. The scale of development to date and the occupiers already located on the site illustrate the elevated position that the business park is held within the sub-region. The development of Parcel 7 would contribute to the consolidation of Birchwood as an important high-value employment location.

5.5 In conclusion, the analysis from the study indicates that since this area is not a UDP allocation, there would no case for de-allocation of this site and allocation to another use.

Woolston Grange

5.6 The study identified that Woolston Grange occupies a strong location from the point of view of the market. It currently represents Warrington's largest industrial estate (over 80 hectares). The Warrington Annual Property Review 2008 noted that the site represented 30% of take-up in 2007. There are currently relatively few undeveloped sites within the estate but in addition to these a number of units have become vacant. The area is currently dominated by industrial and distribution uses but there are economic development aspirations to encourage a diversification of commercial floorspace to strengthen the distribution role. The market consultations reinforced the fact that despite take-up levels the site is currently not considered to be reaching market potential, with enquiries for space often thwarted by lack of suitable space and limited infrastructure. The site has potential for a range of employment uses, including distribution, but significant work would be required to enable a greater mix of uses e.g. road widening and remediation of old industrial sites. This may require investment from the public sector, in order to facilitate private investment and occupation. The site is constrained by the context set by the current uses on site, which has dampened demand to bring forward development. The site has had considerable interest from distribution firms in the past, but these have been deterred by planning constraints (S106 requirements etc) required to address the current issues with infrastructure. Such issues will be further assessed by the Infrastructure Capacity Assessment paper which is being prepared to inform the Council's Core Strategy.

5.7 In conclusion, the analysis from the study indicates that since this area is not a UDP allocation, there would no case for de-allocation of this site and allocation to another use.

Recommendations to take these sites forward

5.8 *Birchwood Park* - Whilst there is considered to be no role for the public sector in directly enabling development of the final phases of the site, it will be important to monitor the ongoing management of the Business Park, which has recently seen a number of units become vacant. It is vital that the Park maintains its strong reputation in order for it to continue to attract further high-profile occupiers.

5.9 *Woolston Grange* –To realise wider aspirations to elevate the status of this site for higher-value distribution and industrial uses will require improvements to infrastructure linkages. Further work is required to assess the costs of these improvements as well as the potential to manage a process of acquisition of units as they become vacant (particularly those of a poorer quality). Plans for this site will need to factor in and balance the anticipated phasing of other large employment sites in the area, including the Omega Strategic Regional Site. The Woolston Grange area may benefit from a future Masterplan for the area to provide a vision for how the area may develop in the future.

Second Tier of Prioritised Sites

5.10 In addition to the sites above, a number of other were identified as a result of their market appeal or ability to contribute to regeneration agendas. In Warrington, the following two sites were identified.

5.11 *Calver Road* - The site is located off Winwick Road, which is an area of wider interest for Warrington Council. There is a context of distribution uses in close proximity. In addition there are identified deliverability issues surrounding ownerships and site remediation. Given the location of the site, the study concluded that there would be no case for de-allocation of this site and allocation to another use.

5.12 *Fiat Site* – The site lies on the A49 Winwick Road Corridor and is still in use by Fiat with active buildings on site. There are aspirations to realise the site for higher value uses but the current use makes it difficult to ascertain a detailed market perspective and identify a development timeframe. It is important to note that this site is not currently part of the Council's forward supply of employment land therefore could not technically be considered for future de-allocation.

Key Statistics from the study

Labour Force

5.13 The sub-region has a strong labour force base, in terms of economic activity rates, income and skills reflecting the attractiveness of large parts of the area in terms of the residential market. This presents a significant asset for future employment and economic growth.

5.14 Within the Cheshire Warrington sub-region 33% of working age people are qualified to NVQ Level 4 and over, compared to 28.5% nationally. This indicates that the area is in a strong position to fuel the development of these industries.

5.15 Earnings of Cheshire Residents and Warrington workers are higher than the UK average of £456.70. The difference in workplace and residence based wages in Cheshire imply that there is a considerable degree of out-migration from Cheshire, to higher value jobs elsewhere, and that the opposite is true in Warrington, where workers have a median income of £455.40 compared to residents' £440.20.

5.16 Crewe and Nantwich, Ellesmere Port and Neston and Warrington appear to be net importers of higher value employees, as workplace income is higher than that of residents. Chester, Congleton, Macclesfield and Vale Royal appear to be net exporters of employees, as residential income is higher than that of workplace. This corresponds to the idea that the residents of these areas commute to major centres for more highly paid jobs than those available in the locality.

Employment growth and future floorspace

- There has been strong employment growth within the sub-region between 1998 and 2008 (additional 46,000 jobs).
- Public sector employment has been the strongest performer.
- Financial services have also experienced growth over this period, albeit with a period of lower growth recently.
- The manufacturing and primary sectors have been reducing in employment terms but appear to have showed a more stable trend over the last 3 or 4 years.
- The sub-region has delivered an additional 316,000m² of commercial office floorspace and 838,000m² of warehouse space between 1998 and 2008.
- The amount of factory floorspace has fallen by 381,000m² over this period reflecting the decline, particularly in the early part of this period of manufacturing employment.
- Historical growth in commercial office and warehouse space highlights the buoyancy of the commercial markets across many parts of the sub-region through a period of economic growth. This has led to relatively high levels of take-up of employment land in many parts of the sub-region and led to the delivery of some high quality floorspace which has strengthened the commercial property market of the area. This is particularly the case in Warrington where previous take up has exceeded the UDP annual average rate. The Employment Land Trajectory is included in Chapter 3 of this report.

5.17 The table and graph below illustrate the trends in commercial office, factories and warehouse floorspace between 1998-2008.

	Square Metres			
Floorspace	**1998**	**2008**	**1998 - 2008 Change Absolute**	**% Change 1998 - 2008**
Commercial Offices	335	444	109,000	33%
Factories	765	614	-151,000	-20%
Warehouses	1212	1311	99,000	8%

5.18 Whilst recent years have witnessed a positive trend in terms of employment growth and the delivery of new commercial floorspace forecast simulations suggest that the sub-region is going to experience a period of employment loss, which in turn will impact on the levels of new demand for commercial floorspace. The availability of detailed up to date forecasts and the questions marks around the validity of accurately forecasting sector demand forward means that a quantified scenario of demand for floorspace and land has not been derived from this modeling.

5.19 This potentially has implications for future sites in Warrington when attempting to assess where such growth sectors should be located and what type/ size of land is required. In terms of strong service sectors, planning policy will look to provide future space in town centres, close to public transport, and Warrington's long term future Waterfront proposals would fulfil this demand.

5.20 Two scenarios are explored to factor in the likely effect of the current downturn, these identify that additional job losses (on top of the 5,000 in the baseline) could range from 11,000 to 85,000. The lower estimate (Scenario 1) is identified as being more realistic and in line with national forecasts.

5.21 Two simulations are run on Scenario 1 to identify the impact of job losses. The preferred scenario suggests that job-losses will be witnessed over a relatively tight time-frame with a period of recovery following to get back to the baseline forecasts in 2019. This is a key conclusion for the research as the future supply of premises and land will need to correspond to the needs of these businesses driving the economic recovery. The analysis identifies that the sectors likely to be leading this recovery are balanced between traditionally strong service sectors (Finance and Business Services and Public Administration and Other Services) and Manufacturing sectors (benefiting from better trading conditions).

5.22 Through the economic prognosis of the sub-region, the analysis identified that industrial sectors, identified as being key growth sectors over this period, included a clustering of motor /retail / services sub-sectors as well as business services. These sectors do not closely match up with the assessment of the inward investment market undertaken through this research.

5.23 In the current economic context, the analysis highlights that the provision of employment land needs to reflect and support the indigenous business strengths of the area. This therefore suggests that there will be sustained demand, in particular for B1 uses (relating to business services) but also higher quality industrial uses, including distribution, and that new commercial provision needs to respond to the needs of a broad range of sectors.

5.24 Sectorally, demand continues to be driven from the public sector, but also, interestingly, from manufacturing and associated warehousing which has not been as vulnerable to economic trends. This includes, for example, supermarket requirements and distribution facilities. Other stronger sectors include recruitment and pharmaceuticals reflecting the traditional business sector strengths identified through the analysis of economic drivers.

Agent/Business Consultation

5.25 Warrington was identified by most agents as the strongest location in the sub-region, with good transport links reinforcing its appeal. Take-up is on course for usual 300,000 sq ft per year, although activity is slowing as in most areas.

5.26 A number of agents noted the comparative strength of Warrington within the sub-region. The delivery of new schemes has maintained momentum in the area and ensured that it stands alone as a marketable destination.

5.27 Market consultation undertaken through this research has reinforced these assertions, and indicated that businesses are tending to seek more flexible commercial floorspace, reflecting the uncertainty of the wider market. Indeed the difficulties in forecasting future levels of demand and where this demand will be focused, was highlighted by all agents consulted. The suitability of Warrington's remaining and future supply of employment land will be assessed as the Core Strategy progresses.

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Recommendations and future work

5.28 As outlined above the study makes a number of recommendations to assist in the delivery of identified sub-regionally significant sites. In addition the study advised that the 'second tier' sites should be considered alongside those sites identified as priorities for investment through the study. These sites are also considered to offer significant potential in the future but, in a number of cases, the appraisal of the sites has identified considerable potential delivery issues. It will be important to explore the viability of these sites in more detail in the future. Central Warrington (Waterfront area) was also identified as having clear potential and offers an opportunity to link both housing and economic growth within the area. Delivery issues means that focus will need to be retained on bringing the site forward in the medium-longer term.

5.29 The study also outlined that RSS identifies a current oversupply of land within Cheshire and Warrington. Policy therefore dictates that consideration should be given to de-allocate land over the RSS plan period. Almost a third of the total amount of employment land is located within Ellesmere Port and Neston. Given the the sub region's significant number of large allocations, consideration of the opportunity and impact of de-allocating a number of these sites may be required.

5.30 Following the assessment of growth sectors and economic forecasts, the study was cautious in calculating forward floorspace or land requirements due to the differing economic forecasting models arising from the current economic climate. The study advises that the emerging round of new and updated Employment Land Reviews will provide a quantified assessment of demand. In the ongoing monitoring of the prioritisation process it will be important to take into account further work on assessing demand in more detail as advanced through the Employment Land Reviews across the sub-region

5.31 Further work is required and is ongoing at a regional level to re-assess the types of commercial floorspace targeted on those parts of the sites without planning permission and the potential to encourage a greater mix of end uses on the sites therefore improving viability and market appeal.

5.32 The phasing of these large sites and the targeting of end occupiers and uses needs to be considered carefully in light of the demand picture presented through the research. Balancing their delivery against other sites in close proximity, a number of which have been identified as sub-regional priority sites, will need to be explored further and carefully managed.

6 Conclusions

6.1 Warrington is a well established business location. The background statistics to the study clearly indicate that Warrington is an attractive and vibrant location in which to work and live. The town benefits from a regional workforce of more than 4 million people. Historically the takeup of employment land has generally been consistent with the provision made for up to 310ha of employment land available over the period of 1996 - 2016. From 2003-2011 the total committed and identified supply currently stands at 233.23 ha. Numerous national and international businesses are present in Warrington and over 6000 companies are currently represented in the town. The borough is now seen as one of the key distribution locations within the North West, mainly due to its motorway connections and has attracted a number of large companies.

6.2 The review of employment sites was divided into four categories; UDP allocations, established employment sites, vacant and sites with planning permission or under construction. The borough has a significant number of existing and well established employment sites which display a range of characteristics and cater for all business sectors in terms of uses size of premises and accessible locations.

6.3 There are also five forthcoming employment sites which have planning permission for future economic development. The M62 Westbound Service area is also due to benefit from a hotel which will provide needed hotel accommodations in the north west area of the borough to complement the existing hotel developments in Woolston Grange, Centre Park, Winwick Quay and Birchwood Park.

6.4 Whilst the borough is characterised by a number of very successful out of town distribution and office locations which are attractively located, Warrington town centre also provides a strong and popular location for small office developments and financial and professional services.

6.5 The future provision and take up of employment will continue to be monitored on an annual basis through the Employment Land Availability Statement and an annual update of the schedule of available floorspace and land contained in this study. The Core Strategy will be the vehicle to identify future issues and challenges particularly in identifying the most sustainable way of planning for an appropriate level and bringing forward employment land supply.

6

Conclusions

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