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The Weaver Towns

Middlewich, Northwich and Winsford

An Economic Assessment

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WEAVER TOWNS - Middlewich, Northwich and Winsford

Economic Assessment

Executive Summary and Conclusions

The Mid Cheshire towns of Northwich, Winsford and Middlewich have a long industrial heritage and have made a major contribution to the economic success of Cheshire and Warrington, particularly in the chemicals and manufacturing sectors. This contribution has now lessened and the challenge is to find a new high value economic future for the Mid Cheshire towns. This should be balanced with housing supply opportunities and the need for environmental sustainability, whilst maintaining and enhancing the quality of life for residents.

This CWEA report draws material from recent reports by Pion Economics, Roger Tym and Partners, Ekosgen, GVA Grimley and other sources to enable CWEA and Local Authority partners to assess opportunities and address how to achieve them

The analysis in this report shows that the Mid Cheshire (Weaver) towns are together of comparable size to Chester or Crewe. However the three towns make a lower contribution to economic output and employment opportunities than Chester or Crewe. There is, with the exception of Winsford, a very wide mismatch between the skills and aspirations of local residents and the jobs available locally.

The Weaver towns share locational and structural common characteristics and factors which impact on their economic development. For example, good access to the M6 but poor public transport links between each other, with Chester or Warrington, and also with Liverpool and Manchester. However, locationally, the Weaver towns have great potential for more sustainable transport connectivity, especially through rail.

Collectively, for the Weaver towns, journeys to and from work are primarily with other towns in Cheshire and Warrington. Winsford in particular is relatively self-contained and "isolated", with many working people in the town either employed there, or in Middlewich or Northwich. Middlewich, on the other, hand is represented by large out and in flows in terms of journey to work. Northwich is a broader, more balanced economy but in need of regeneration to replace older industrial sites, now perhaps more attractive to housing.

A main conclusion from the journey to work analysis is that the Weaver towns at present only really form a functional economy within the realm of lower skill level occupations. A further conclusion is that in order to improve environmental sustainability and social cohesion, the mix of future employment growth should include more managerial and professional occupations, thus reducing higher level out-commuting.

Winsford has the closest journey to work links with the other towns, with two thirds of resident flows ending in one of the three Weaver towns, with the proportion travelling to Middlewich relatively high. Transport connectivity between Winsford and employment sites in Middlewich should also be a priority for action.

Based on the economic performance analysis in this report, all three towns face more serious economic development challenges than any of the others considered in Cheshire and Warrington. This is especially the case in Winsford where there are no performance driver scores across the full range of performance indicators (relating to labour demand and supply, plus location and property) above the country-wide average.

Middlewich likewise displayed something of a weak profile. While the labour market is indicated to be relatively strong, there are weaknesses in most other indicators. Northwich while having a better mix of attributes for development, still lags behind many other Cheshire and Warrington towns.

Individually the Weaver towns lack the scale and agglomeration strength to have a major impact on their hinterlands but by attempting to create close collaboration via integrated economic development there is the potential to overcome some of the disadvantages faced by the three places.

Until now, regeneration strategy and housing and employment land plans for Northwich, Winsford and Middlewich have been developed largely in isolation from each other. Given the potential that three Weaver towns have for both increased housing supply and better-balanced economic opportunities, there is a strong case for a co-ordinated Masterplan.

The current economic recession will have an impact, in slowing the delivery of existing plans such as Northwich Vision and Winning Winsford. This, plus local government reorganisation presents an opportunity to rethink the scale and shape of the ambition for the three towns together.

1. Introduction

Mid Cheshire has a history of salt extraction and processing which goes back to at least Roman times, and in the 19th and 20th centuries, the Northwich area became the UK's main centre for salt production. The long history of salt and early chemicals production has left Mid Cheshire with a distinctive landscape of waterways, flashes and former industrial sites. These unique features form the key to the development and branding of the area.

The challenge is to develop a new economic future for the Weaver towns. This report draws material from recent reports by Pion Economics, Roger Tym and Partners, Ekosgen, GVA Grimley and other sources to enable CWEA and Local Authority partners to assess opportunities and address how to achieve them. Each of the three towns is considered in these reports separately but there are common themes.

2. Profile of the Weaver Towns

2.1 Population of the Weaver Towns:

2.1.1 The population of the Weaver towns area (64,950) as a whole is approximately comparable with that of the towns of Chester (59,080) or Crewe (49,520). The age profile is also shown, Northwich has a higher proportion of aged 60+ population.

Fig 1.

Total Population of the Weaver Towns	
Town	Population
Northwich	20,870
Middlewich	13,390
Winsford	30,690
Total:	64,950
Note: Source: Cheshire Current Facts and Figures, areas based on Parish/Town Council areas	

Fig 2.

Population in the Weaver Towns (%)					
Area	0-18	19-39	40-59	60+	Total
Middlewich	25.8	31.8	26.4	16.0	100
Northwich	24.6	29.7	26.6	19.1	100
Winsford	28.5	30.5	24.6	16.4	100
Source: Annual Survey, ONS. © Crown Copyright					

2.1.2 Household income levels are relatively low in Winsford compared with Northwich and Middlewich (mean household income).

2.1.3 All three towns have experienced population growth (2003 to 2006), especially in Northwich.

2.2 Economy

2.2.1 In the past the area was the industrial heartland of Cheshire and Warrington based on deposits of salt, ultimately providing the base for the Chemicals and other industries in the sub-region.

2.2.2 GVA output forecasts for the Vale Royal area indicate a total GVA of £1,819 million in 2009 (at 2003 prices) and percentage growth of 2.0% 2009-2014 (though these forecasts were compiled before the current recession). This represents 15% of Cheshire's total GVA but a growth rate below Cheshire and Warrington and regional forecasts.

2.2.3 Earnings figures are not available for the individual towns but District level figures for the former Vale Royal area indicate that average gross weekly earnings (£430 in 2007) are close to the North West average but considerably below the Cheshire & Warrington and UK averages.

2.2.4 Winsford has proportionally relatively higher levels of people on unemployment and Incapacity Benefit (indicating higher worklessness levels) than the other Weaver towns and across Cheshire and Warrington as a whole. There are also small area concentrations of relatively high deprivation and slightly lower levels of economic activity generally among the labour force. Details of unemployment and claimant data by ward is shown in Appendix 1.

2.2.5 The Weaver towns contain small areas of high unemployment and dependence on income benefits (rate above 10% of working age population), these include: Winsford Verdin, Winsford Dene, Winsford Wharton, Winsford Over, and Northwich Witton.

2.2.6 These areas are likewise reflected in the Index of Multiple Deprivation, with the addition of Winsford Swanlow and Northwich Castle.

2.2.7 No areas in Middlewich are included in these deprived areas.

2.3 Property and Employment Land

2.3.1 The Mid Cheshire property market benefits from the presence of several of Cheshire's main business parks and industrial estates. Two of these – Gadbrook Park and Winsford Industrial Estate – each employed over 4,000 people as at 2005, and Midpoint 18 employed more than 1,800.

2.3.2 Business Parks in the area include:

- Gadbrook Park – 75 businesses and 4,155 employees
- Midpoint 18 – 35 businesses and 1,811 employees
- Wharton Industrial Estate – 25 businesses and 772 employees
- Winsford Industrial Estate – 135 businesses and 4,153 employees

2.3.3 Currently the area offers a wide range of employment sites which, although not of regional significance are identified as of sub-regional importance (Source: Cheshire and Warrington Employment Land Study, Initial Draft – GVA Grimley). Examples include, Lostock Triangle and Gadbrook Park (Northwich), Midpoint 18 (Middlewich), and Winsford Industrial Estate and land south of Bostock Road (Winsford); all of these gain advantage from relatively good access to the M6 and Manchester.

2.3.4 There are challenges for the towns in terms of replacing old industrial sites with appropriate mix of industrial, housing and leisure facility – to benefit the immediate area, the sub-region and region

2.4 Connectivity

2.4.1 Road transport links from Northwich and Middlewich to the M6, Manchester and Chester are relatively good (although schemes to relieve congestion close to the town centres are important priorities). These locational advantages have been recognised by companies such as Tesco and Morrisons which each have large distribution centres in the town, and provide a strong incentive to future investors.

2.4.2 Winsford is less well connected to the M6 and Manchester.

2.4.3 Although Northwich and Middlewich lack direct main line rail services, Northwich benefits from rail services to Chester and Manchester via Altrincham and Stockport. There is potential to vastly improve this service and to reopen for passenger use the Crewe-Middlewich-Northwich line, and to better connect them to the Manchester Metrolink system.

2.4.4 Winsford is well connected by rail to Warrington and Liverpool and to London via Crewe.

2.4.5 Public transport connectivity within and between the three towns, and between Middlewich, Northwich and Warrington, is generally poor, with the exception of fairly good services to Winsford Industrial Estate. It is particularly important that people in areas of deprivation access the employment opportunities of key sites.

2.5 Journeys to work between the Mid Cheshire towns

2.5.1 Journey to work patterns for the Weaver towns of Middlewich, Northwich and Winsford yield a useful insight into the extent of their representing an economic unit. Information gathered from the 2001 Census, whilst dated, are the most recently available statistics at this level of detail. These indicate:

- In terms of self-containment, Winsford is the most self-contained labour market of the Weaver towns, with 53% of journey to work flows starting and finishing in the town. The respective figure for Northwich is 46%, also relatively high whereas Middlewich has a low level of self-containment (33%), reflecting the greater flows into and out of the town for work, and a greater mis-match between the local population and local jobs available.
- For Middlewich an additional 8% of residents travel to Northwich and likewise (8%) to Winsford. Of the three towns, Winsford has the closest journey to work links with the other towns, with two thirds of resident flows ending in one of the three Weaver towns.
- Linked to levels of self containment, Northwich (0.9) and Winsford (0.7) have relatively high job density levels; whereas this is low in Middlewich (0.6), reflecting the imbalance between resident labour and employed work forces. (Source; Pion)
- Flows between the three towns vary in number and proportion but are generally modest. The largest flows are of people travelling for work between Northwich and Winsford (both ways between around 1,000 and 1,500 people or 8 to 9% of journeys from each town). In proportional terms the biggest single contribution is the 12% of journey to work flows to Middlewich which come from Winsford.
- Generally, journey to work patterns vary greatly by occupational group, with people in managerial or professional jobs tending to travel furthest. This is relevant to the flows from, and to, the Weaver towns. For example, of all the professional workers who live in Winsford, 32% also work in the town. For Northwich the figure is similar (31%) but for Middlewich it is lower at 21%, again reflecting Middlewich's lower level of self-containment and links with the other Weaver towns.
- Self containment is higher in all three Weaver towns in terms of low-skill levels, including operative and elementary occupations. Likewise it seems that journey to work links between them are also relatively higher, most notably with 22% of those in elementary occupations in Middlewich coming from Winsford.

2.5.2 The main conclusion from this journey to work analysis is that the Weaver towns only really form a functional economy within the realm of lower skill level occupations. In addition,

the Pion study carried out for CWEA and NWDA has found that the Weaver town journey to work flows to and from neighbouring areas outside the sub-region were also much less frequent compared with other such similar sized towns, reflecting a degree of isolation from the jobs market in the likes of Greater Manchester, Merseyside (or even the West Midlands) and any potential agglomeration benefits from such city regions. In particular, the Winsford economy and labour force is highly dependent on a hinterland close to the town and including Northwich and Middlewich.

2.5.3 A further conclusion is that in order to improve environmental sustainability and social cohesion, the mix of future employment growth in Middlewich should include more managerial and professional occupations. Transport connectivity between Winsford and employment sites in Middlewich should also be a priority.

2.6 Business Growth

2.6.1 Enterprise levels are moderately high in the Weaver towns, especially in Northwich with 49 businesses per 1,000 working-age residents and Middlewich (43); business concentration levels are lower in Winsford (35).

2.6.2 For the Weaver towns there has been business growth across all size bands (2003-2007) of businesses except for in Winsford in the 11 to 49 employee size band. (Source:Pion)

2.7 Employment

2.7.1 Number of jobs in the three mid Cheshire towns and their proportion by industry group are shown in the following charts.

2.7.2 Employment Sector Profiles:

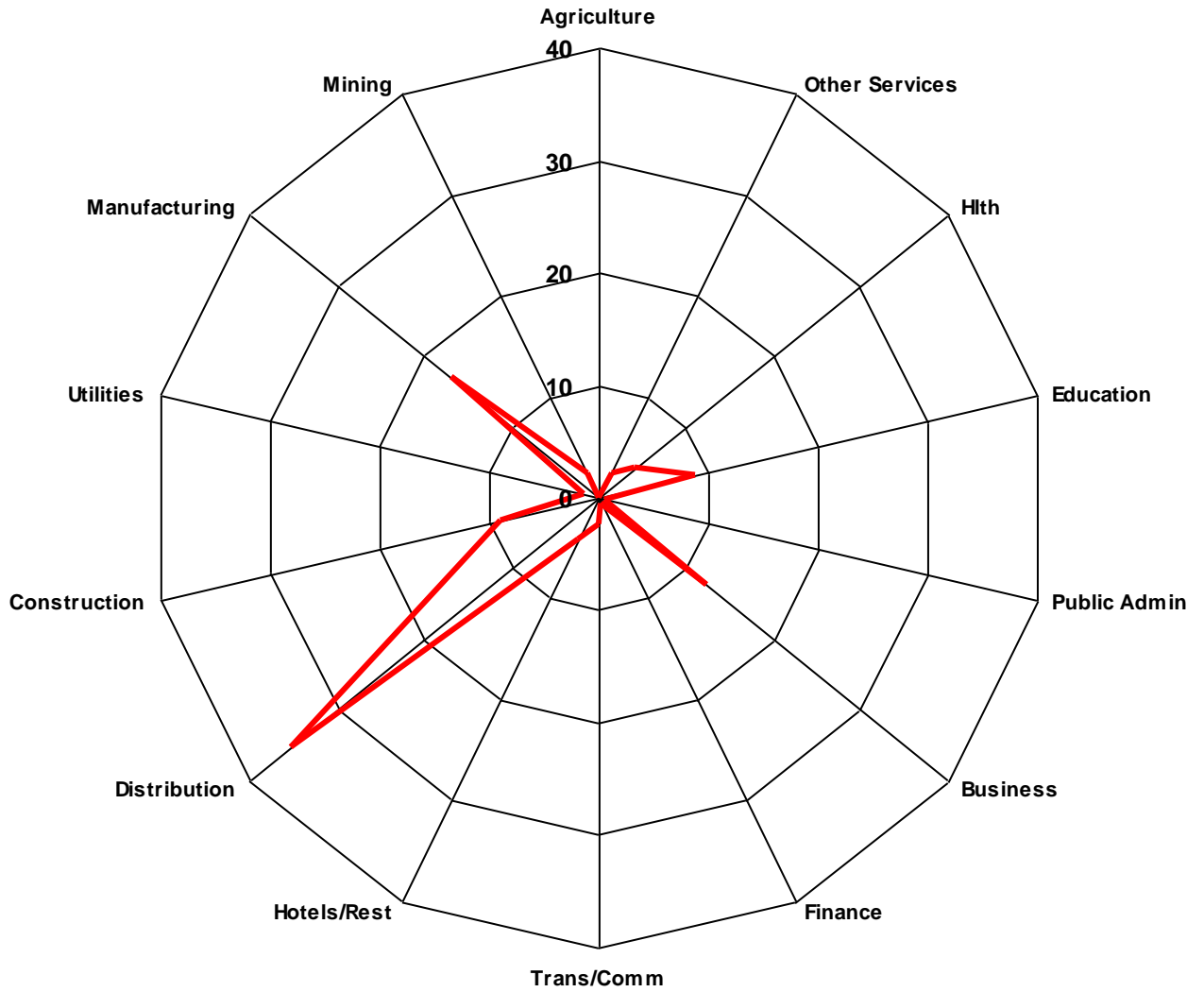
- Manufacturing employment is relatively high in Winsford (20%) and Middlewich (17%).
- Retail/Distribution employment is proportionately high in Middlewich (33%) and Northwich (24%); this reflects, among other factors, the two large supermarket distribution depots in the two towns.
- Public administration employment is relatively high in Winsford (19%) but low as a proportion in Middlewich and Northwich.
- In addition the Pion study has shown that levels of knowledge industry related jobs are relatively low in Winsford and Middlewich but higher in Northwich.

2.7.3 In terms of change, Winsford (13%) and Northwich (5%) have experienced employment growth (2003 – 2007) but employment in Middlewich has declined slightly (-2%).

2.7.4 Middlewich Employment Profile (%)

- Jobs: 8,463

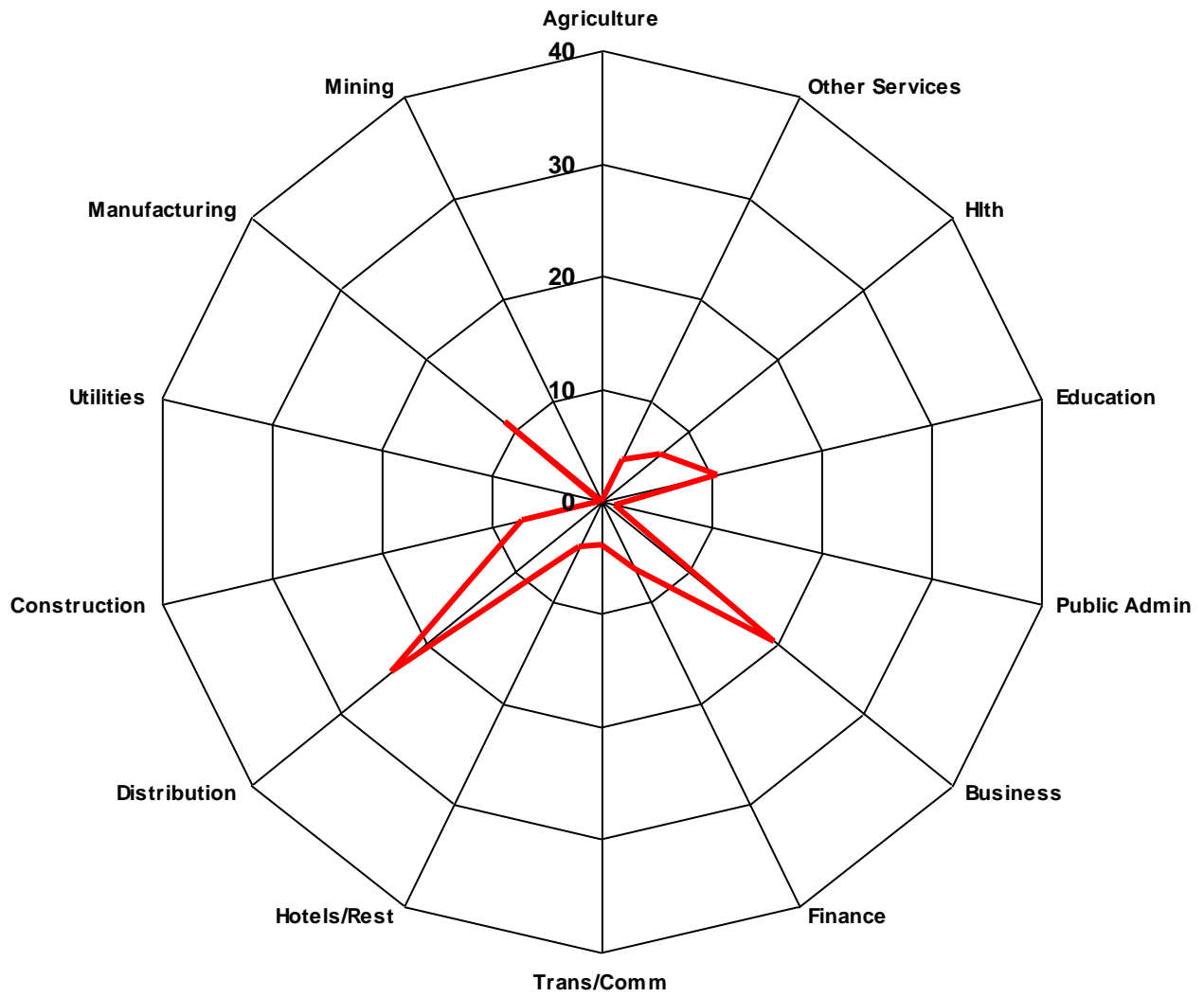
Fig 3.



2.7.5 Northwich Employment Profile (%)

- Jobs: 21,840

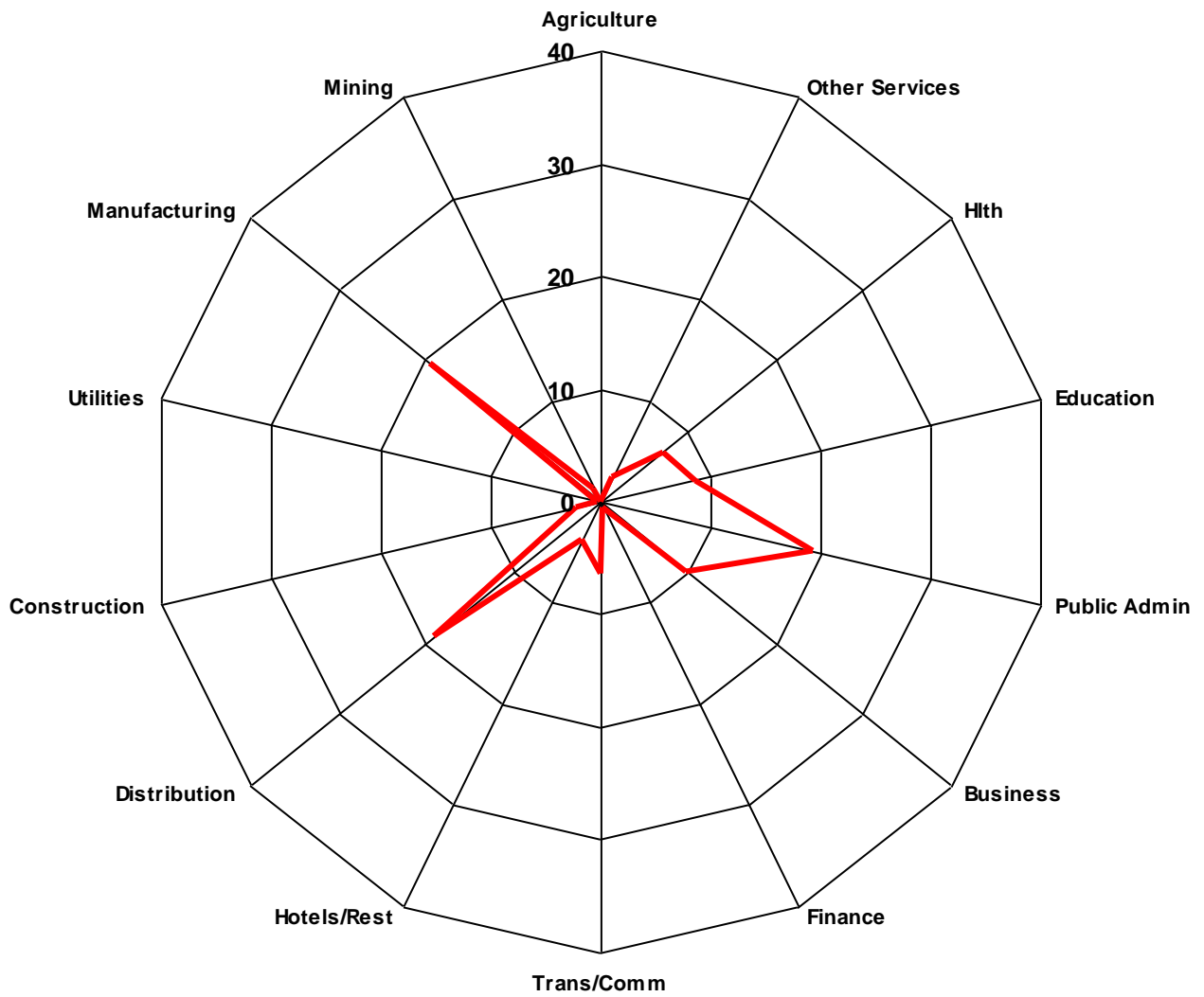
Fig 4.



2.7.6 Winsford Employment Profile

- Jobs: 19,134

Fig 5.



2.8 Economic Performance Compared With Other Cheshire Towns

2.8.1 CWEA and NWDA have commissioned a research project to be completed by Pion Economics and the University of Manchester looking into the economic performance of Cheshire and Warrington's medium sized towns; some of the key findings for the Weaver towns are summarised here.

2.8.2 The study compares medium sized towns across Cheshire & Warrington, firstly covering the core town area and secondly the town plus a 5 kilometre radius. It examines a mix of attributes to show their "potential" relative to a mix of indicators consistent with higher performing productivity areas across the country. The results in the figures below indicate that the Weaver towns score relatively low on many indicators, especially Winsford.

2.8.3 The following charts (Fig 6 and Fig 7) summarise total 'potential' against total scores for enterprise, labour market, location, industry sector and skills – all key factors in successful economies. On this combined measure, all three Weaver towns fall in the bottom half of the Cheshire 'competitiveness chart'.

Fig 6.

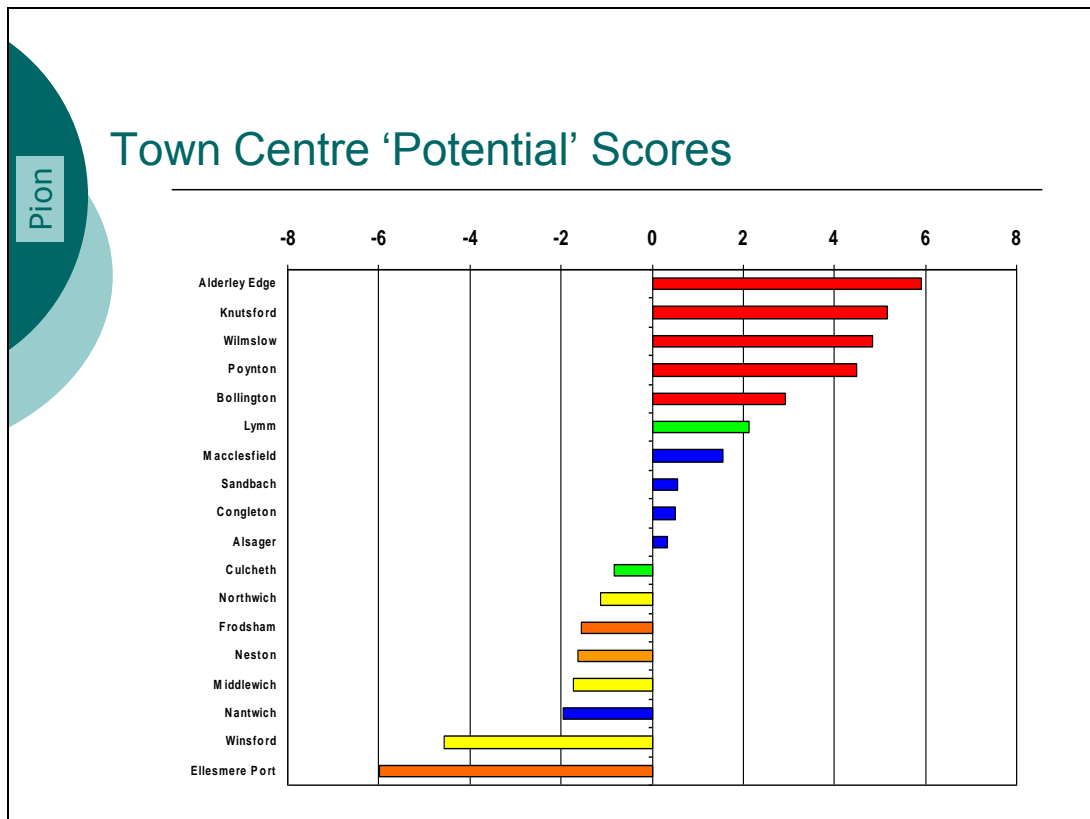
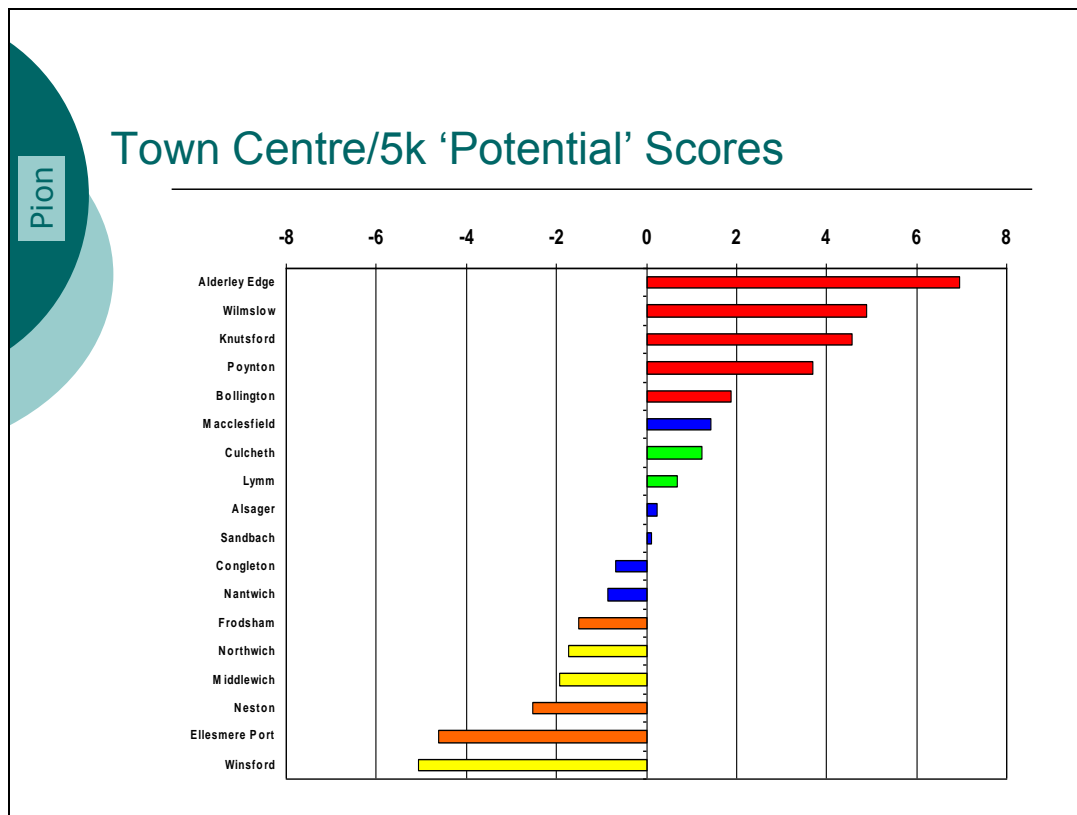


Fig 7.



2.9 Spatial Domain Profiling

2.9.1 Small and medium sized towns in Cheshire & Warrington were grouped into geographical areas, or spatial domains. The table below provides a summary of average spatial domain scores across each of the factors, along with an overall score. The averages are weighted by the working age population in each town centre.

Fig 8.

Average Spatial Domain Scores							
Spatial Domain	Enterprise	Labour Market	Location	Ind Structure	Skills	Property	Total
Sth Mcr Ring	0.6	1.1	0.1	0.8	1.2	0.7	2.8
Warrington	1.1	-0.4	-0.2	-0.4	0.7	0.4	1.2
East Cheshire	0.2	0.9	0.2	0.1	-0.2	-0.7	0.6
Mid Cheshire	-0.8	-0.1	0.0	-0.1	-0.5	-1.1	-2.6
West Cheshire	-1.5	0.3	-0.8	-0.2	-1.1	-1.6	-4.9

2.9.2 As can be seen from the figure above the Mid Cheshire towns of Northwich, Middlewich and Winsford score relatively lower across the range of drivers. This is analysed in more detail in Appendix 2.

3. Current Proposals for the Weaver Towns and their Potential Impact

This section of the report outlines current proposals (some firm, some more aspirational) and draws on the Ekosgen analysis of their likely economic impact. Detailed figures are included in Appendix 3.

3.1 Middlewich

Middlewich Problems and Opportunities

3.1.2 The town centre of Middlewich is grossly underperforming; the town centre does not adequately provide for the needs of its catchment population and that there is a requirement for additional retail floorspace, for both convenience and comparison goods, within the centre to meet this need. The current proposals for a new Tesco supermarket combined with initiatives to link this development to the main retail centre would go some way to addressing these problems.

3.1.3 The town is not functioning effectively as a focus of employment. It is a net exporter of labour and has low self containment. Whilst it provides nearly 6,000 jobs, over 3,500 of these are taken by people commuting into the town. Conversely, some 5,000 of the town's 7,150 economically active population commute outside of the town to work. This suggests a clear imbalance between the types of jobs sought and offered locally. This is reinforced by analysis of job balance data with elementary professions over-represented locally in relation to the skills of the population and undersupply of positions for higher earners.

3.1.4 Moderate employment growth of 5% is projected for Middlewich over the next 15 years. Whilst the manufacturing sector - over-represented in the town - will continue to decline, this will be made up for by projected increases in employment in the logistics, computing services and construction (another strong sector locally) sectors.

3.1.5 Traffic is a significant problem for the town. Whilst its proximity to the M6 is an asset in many ways, the location of employment uses on the other side of the town centre from it, means that a large number of HGVs pass through the centre of the town.

3.1.6 In the longer term, the re-opening of the Northwich-Sandbach railway and the station at Middlewich would make the town more attractive to residents and businesses. In addition, in the medium term the completion of Middlewich Eastern By-pass is also required to really enable the town to fulfil its full potential.

3.1.7 The Vision for Middlewich is for a thriving centre of Cheshire's industrial heartland and focus of its canal network – a great place to live, a lovely town centre and tourism destination of renown.

3.1.8 The objectives to deliver this Vision are:

- Capitalise on the heritage and physical assets of the town, especially the canal, by improving access and gateways

- Improve the town's retail provision and layout
- Address movement issues and improve accessibility and usability of the town
- Encourage residents and visitors to stay in the town centre

3.1.9 The projects considered within this assessment are:

- Middlewich Market Town Initiative
- Middlewich Marina
- Town Wharf Redevelopment
- Middlewich Retail Core
- Midpoint 18
- Eastern By-pass

3.1.10 The main project identified in the Cheshire and Warrington Market Towns Investment Prospectus is to facilitate the development of a large site south of Wheelock Street (the main high street) for development by a large supermarket operator. Other MTI projects are the redevelopment of Town Wharf and reinstatement of the Sandbach to Middlewich passenger rail service which would involve the reopening of the rail station.

Impact Considerations

Town Centre Vitality

3.1.11 Implementation of the main MTI project, potentially through development of the proposed Tesco store, has the capacity to bring about a significant improvement to the vitality and viability of Middlewich town centre which suffers high levels of retail leakage. By directly improving facilities and encouraging other retails and shoppers to Middlewich, it is anticipated that higher rates of retail expenditure can be secured. There is particular potential to increase convenience expenditure. The impact of the other proposed projects which will attract visitors to the town and increase the population through new residential development will help to achieve this. Over the 15 year period, Middlewich should be retaining:

- At least 60% of convenience goods expenditure; and
- At least 15% of comparison goods expenditure.

Tourism Impacts

3.1.12 Tourism is potentially very significant within Middlewich. There are 8,000 boat trips per year in Cheshire many of which pass through the town without stopping. The redevelopment of Town Wharf will provide an important facility for boaters to stop for leisure purposes and to purchase supplies. Because the development of Town Wharf will link the town to the canal all

town centre businesses are likely to see some positive impact as a result of increased stops by boaters which would be directly attributed to this key project. Based on analysis from the Initial Review of the Economic and Other Benefits of Inland Waterways, additional expenditure from boaters would be £148,000 per year and from other visitors would be £75,000 per year.

3.1.13 This level of expenditure would be from additional visits and not as a result of displacement from elsewhere in the Weaver Valley. The Town Wharf development provides potential for additional events and festivals. It will improve the location of the annual Folk and Boat Festival and this already very popular event would have the potential to expand. It is anticipated that there would be three to four additional events per year which would be developed within a summer programme of smaller events under the Festival Weaver programme and brand.

3.1.14 Accommodation in Middlewich is limited so the Folk and Boat Festival generates demand for accommodation elsewhere. Expansion of the festival would generate additional overnight stays elsewhere in the Weaver Valley (eg Winsford, Northwich and Sandbach) and £112,500 additional visitor spend per year.

Economic Impacts

3.1.15 The development of a large supermarket within the town would be a significant source of employment and would generate 118 FTE jobs in the retail sector, plus associate construction benefits.

3.1.16 The development of Midpoint 18 is very significant, with the potential to increase employment in key sectors and improve rates of economic activity. Over the programme period there is potential to create 579 FTE jobs, of which a fifth are anticipated to be in the business services and associated sectors. An estimated 151 of these jobs could be taken up by residents not in employment.

3.1.17 It should be noted that Midpoint 18 has the potential to impact on the business profile for Middlewich, and at the study area scale, but is dependent on the Eastern Bypass.

Property Market Impacts

3.1.18 Potential indirect residential development could be realised with development of the A54 (Eastern By-pass), 150 residential units at the former RHM Foods site and a further 85 with planning approval off the A54. These are edge of town sites and suitability for residential use would need to be determined through the planning process.

3.1.19 Consultation suggests that it retains a reputation as an industrial location despite that many manufacturing businesses have closed. Implementation of the proposals would improve Middlewich as a commercial location for higher value businesses by improving the town's image. There is unlikely to be as significant increase in demand as in Winsford but an uplift in

commercial activity is still expected as indirect impact of the Weaver Valley programme. We estimate that an additional 5,000 m2 of floorspace can be developed for higher value activities, accommodating 159 jobs.

3.2 Northwich

3.2.1 Northwich is one of the towns within the West Cheshire Growth Point. Housing growth sites have been identified at Winnington Village and in the Town Centre. Other Northwich Vision activities such as the mixed use development at Baron's Quay and the development of Lostock Triangle Business Park will help to support this new residential growth.

3.2.2 For the purpose of the Ekosgen study the collective outputs for Northwich have been drawn from the following programmes and projects:

- Destination Northwich
 - Northwich Cultural Centre
 - Northwich Woodlands
 - Lion Salt Works
 - Anderton Boat Lift
- Employment projects
 - Gadbrook Park
 - Lostock Triangle
 - Wincham Business Park
- Northwich Vision
 - Land adjacent to Victoria Bridge
 - Northwich Marina
 - Navigation Road
 - West of Queen St
 - Northwich Market
 - Civic Areas
 - Lock Street
 - Northwich Station
 - Sites East & West of Old Warrington Rd
 - North of Leicester Street
 - Baron's Quay
- Winnington Urban Village
- Northwich Masterplan (Includes a variety of tourism, public realm, transport improvement, retail projects)

Impact Considerations

Tourism and Visitor Economy

3.2.3 Forecast visitor numbers from each new facility are relatively modest when considered in isolation, but using evidence from elsewhere, Ekosgen were able to attribute catalytic impacts through extended visits and associated additional visitor spend. These estimates suggest that an additional 67,500 day visits will be potentially secured whilst the share of overnight stays will increase to 15%, generating £1.4m of additional spend.

Economic Impacts

3.2.4 The gross direct employment impact from the programme in Northwich is estimated as 2,153 jobs. This accounts for more than 10% of the existing employment total in Northwich. The projected mix of employment by type is:

- Level 4 and above – 35%
- Level 3 – 15%
- Level 2 and below – 60%

3.2.5 In addition, objectives to address worklessness can be secured, with an estimated 388 jobs taken up by those not in work, almost a fifth of the current worklessness total.

Social and Community Impacts

3.2.6 Northwich currently possesses three SOAs within the 20% most deprived neighbourhoods in England. An aspirational target of a reduction of two SOAs has been identified over the lifetime of the Weaver Valley programme.

3.3 Winsford

3.3.1 Proposals for Winsford are focused principally on delivering social and economic benefits. These include redevelopment of the waterfront and development of education, health and leisure facilities. The town is also included as a focus area within the West Cheshire New Growth Point.

3.3.2 Winsford Industrial Estate is approximately 70% occupied with 30 acres of land still available for development. There is significant potential for increased occupancy. The Woodford Industrial Estate has a higher occupancy rate at around 80%. Ten acres of the estate has recently been developed as a business centre which has occupancy levels of around 70%.

3.3.3 Document storage has developed as a niche industry in Winsford and is based in the old salt mines which provide perfect conditions with low moisture and hazardous waste levels.

The storage operators are keen to expand the facility which would require a new access to the mines.

3.3.4 Consultations suggest that the principal drivers of inward investment in Winsford are low rents and good transport connections. The town was observed to have an 'image problem' which environmental improvements could address to stimulate more, and better quality, investment.

3.3.5 Winsford Town Park and Learning Zone will comprise a mixed use development area between the river and town centre. The Learning Zone is funded through the NWDA. A new lifestyle centre recently opened and will provide sport and leisure facilities.

3.3.6 The Weaver Valley proposals include the possibility of an inclined plane canal link at Winsford. An "iconic" option envisages the creation of major new visitor facility, capable of attracting 335,000 visitors and 1,600 boat trips per annum. Potential economic benefits from other options would be more limited.

3.3.7 The scale of proposed projects together with Winsford's role as important economic driver suggests that there is significant potential for change within this focus area.

3.3.8 The principal projects in Winsford considered within this assessment are:

- Winning Winsford (All through School Initiative, Winsford Lifestyle Centre)
- Residential development within the New Growth Point programme.
- Salt Mines (Salt Mine Experience and increased use of the salt mines for document storage)
- Winsford Sailing Hub (Ways Green remediation, events campsite, sailing events space/facilities, sailing club link road Improvements)
- Winsford Southern Gateway (bottom flash multi-user loop, access road and car park from A54, access road and car-park from A54, Bund extension, cycle route link and speed reduction on the A54)
- Cross Waterfront Interventions (crossing framework, visitor moorings, new marina, Waterfront Festival, fishing competitions, public realm, signage & interpretation, community woodland planting, riverbank reinstatement)
- Inclined Plane – Iconic option
- Newbridge Gateway (Newbridge Visitor Facility, Salt Works relocation (phase 3), Whitegate Way footbridge)
- West Bank (Salt Works relocation (phases 1 and 2))
- Weaver Parkway Centre (chemical works relocation)

- Riverside Head Loop
- Winsford Gateway (Winsford Learning Zone, Church Street/New Road, Greedy Pig site, rear of Red Lion, new footbridge, central gyratory, Hill Street Site, island & waterfront activity hub, play facilities, pedestrian access in front of Red Lion, existing industrial units in front of New Road, town centre pedestrian loop, public realm & lighting, Town Park).

Impact Considerations

Multiple Deprivation

3.3.9 Currently, there are three Winsford SOAs in the most deprived 10%. It is anticipated that this would reduce to one.

Economic Impacts

Business Sector Profile

3.3.10 The Waterfront proposals, together with the Lifestyle centre, have potential to increase the appeal of Winsford as a place to work and do business. There are likely inward investment benefits which have the potential to improve the amount and quality of occupancy on Winsford's key employment sites. There is considerable potential for the town's business profile to shift towards higher value sectors if image can be improved and if a highly skilled workforce can be attracted to support investment from higher value businesses. The proposed projects in combination with planned housing growth have very significant potential to achieve this.

3.3.11 The redevelopment of the All Through School site would potentially create a major new business location in the town, with the bulk of the site capable of accommodating B1 uses. In total, 12,000sqm of new high quality business space could be provided, accommodating 480 jobs.

3.3.12 An indirect impact on Winsford's industrial estates is assumed. Occupancy on both Winsford Industrial Estate and Woodford industrial estate is anticipated to rise to 90%. Similarly occupancy on the business centre at Woodford should rise to 90%. Rising demand for business premises should also encourage development of 20 of the 30 remaining acres of land available for development.

3.3.13 Improved image has the capacity to increase demand and stimulate commercial development. As a proxy measure of demand, rents per square foot are anticipated to rise by 10% over and above the baseline trend with a 20% increase in the share of development for B1 uses.

Labour Market

3.3.14 Improved attainment following development of All Through School in combination with the Learning Zone, together with provision of new jobs, has significant potential to address worklessness in Winsford. There are currently 2,270 working age benefit claimants in Winsford, a rate of 10.3%. A reduction in the rate to 8% over the lifetime of the Programme would equate to 505 fewer claimants.

Tourism Impacts

3.3.15 The potential for tourism to become significant would depend on development of the Inclined Plane as this would open up the waterway for boat visitors while construction of an iconic structure would serve as an attraction in its own right. Impact analysis contained within the British Waterways Waterspace Strategy suggests that the facility would generate an additional 3,700 boat trips per year and an additional 355,500 visitors per year, with an associated spend of £1.5m. If only 30% of these stopped in Winsford, a conservative estimate given that the proposed site is adjacent to the town, this would mean 1,110 boat trippers and 106,650 walkers would contribute an additional total of £534,000 annually to the local economy, with a further £900,000 of spend elsewhere in the Weaver Valley due to increased overnight stays.

Property Market Impacts

3.3.16 Diversification of the housing offer is necessary to provide desirable accommodation for skilled in-migrants to support the economy. Consultations suggest that there is still considerable appetite amongst developers. In addition to the units identified as direct outputs of the strategy, further development to meet the Growth Point agenda and support economic development can be assumed over the programme period. This may be facilitated by implementation of the All Through School project which would release current school sites and provide opportunities for residential or commercial development.

3.3.17 Increased demand for residential property and diversification of the residential offer can be expected to be reflected in the mix and type of new housing development. It is anticipated that the 1000 new units proposed will be supplemented by a further 300 units.

Overall - Employment and Business Impact

Gross Value Added (GVA)

3.3.18 Assuming full implementation, the Ekosgen report estimates that the full programme of developments across the three Weaver towns would potentially generate over the next 15 years an additional GVA, combining both direct and indirect impacts of:

- Northwich – £90m
- Winsford – £66m
- Middlewich – £152m

- 3.3.19 In terms of employment, the impact would potentially be:
- Northwich – 2,153 direct and 108 indirect jobs; 2,261 in total
 - Winsford – 281 direct and 1,013 indirect jobs; 1,293 in total
 - Middlewich – 119 direct and 3,433 indirect jobs; 3,552 in total

Sources:

Ekosgen, An Economic Assessment of the Weaver Valley, Draft report, March 2009

Pion Economics, Cheshire Medium Sized Towns, Draft Report April 2009 for CWEA / NWDA

CWEA & Cheshire County Council, Cheshire & Warrington Market Towns Investment Prospectus, Final Report March 2009

GVA Grimley, Cheshire & Warrington Sub-regional Employment Land and Sites Study, Initial Draft, April 2009 for CWEA / NWDA

Cheshire County Council, Weaver Valley Economic Background Report, February 2009

Cheshire Current Facts & Figures and Cheshire & Warrington Econometric Model

Office for National Statistics / NOMIS

4. APPENDICES

Appendix 1

A.1.1 Unemployment concentrations within the Weaver Towns:

Fig 9.

Vale Royal 2001 Census Boundaries	Number Unemployed January 2009	Working Age Residents 2007	Rate (%)
Northwich:			
Barnton	106	3,490	3.0
Hartford & Whitegate	51	3,890	1.3
Leftwich & Kingsmead	157	5,271	3.0
Northwich Castle	165	4,123	4.0
Northwich Winnington	44	1,772	2.5
Northwich Witton	240	4,305	5.6
Rudheath & South Witton	110	2,914	3.8
Sub total:	873	25,765	3.4
Middlewich:			
Cledford	123	4,560	2.7
Kinderton	106	3,840	2.8
Sub total:	229	8,400	2.8
Winsford:			
Winsford Dene	104	2,600	4.0
Winsford Grave	70	2,555	2.7
Winsford Over	180	3,665	4.9
Winsford Swanlow	105	2,869	3.7
Winsford Verdin	170	4,142	4.1
Winsford Wharton	149	3,236	4.6
Sub total:	778	19,067	4
Total:	2,034	56,994	3.5
Source: Cheshire Current Facts and Figures based on ONS / NOMIS data.			

Fig 10.

Working Age Benefit Claimants, August 2008				
Area	Incapacity Benefit (IB)	Job Seekers Allowance (JSA)	Severe Disability Allowance (SDA)	Total
Middlewich	405	150	80	635
Northwich	1,470	540	260	2,270
Winsford	1,715	515	220	2,450

Source: Working Age Claimant Count, ONS. © Crown Copyright

A.1.2 The figure below indicates vacancy rates and rental levels in the Weaver towns, though these will have substantially changed given the current economic recession.

Fig 11.

Vacancy Rates and Zone A Rental Levels				
Town	2000 Vacancy Rate (% units)	2006 Vacancy Rate (% units)	Change (2000 - 2006)	2006 Zone A Rental Level
Middlewich	17.4	16.9	-0.6	£242 psm
Northwich	6.6	5.7	+0.8	£592 psm
Winsford	20.7	8.1	-12.6	£484 psm
UK average		9.2		
Cheshire average				£891 psm

Source: Cheshire Towns Centre Study (2007). *Colliers estimate. **taken across 9 major Cheshire towns.

Appendix 2

Spatial Domain Profiling: Mid Cheshire Towns

A.2.1 Middlewich and Winsford rank among the weaker town centres in the study sample though they are compensated to some degree by Northwich. Despite this feature, as a combined entity, the towns represent the second weakest spatial grouping in the study.

A.2.2 In more detail:

- Enterprise:
 - performance scores vary from a marginal positive in the case of Middlewich to a moderate negative in the case of Northwich and the second largest negative in the study sample for Winsford – performance for Middlewich is marginally above the overall England average while that for Northwich and Winsford are lower than that average;
 - extending the spatial focus to 5km reduces the performance score of Middlewich though the value still lies close to the average, but improves those of Northwich and Winsford, and in the latter case considerably, indicating differential hinterland performance characteristics across the towns;
- Labour Market:
 - the labour market score for Middlewich is significantly positive whereas that for Winsford is broadly on average and it is Northwich that indicates lowest potential in this regard;
 - widening the spatial focus strengthens the scores of Middlewich and Northwich but significantly weakens that of Winsford, suggesting that the positive labour aspects of the centre do not extend to the immediate hinterland;
- Location:
 - there is little to choose between the towns in terms of location. All three are scored very close to the overall average indicating that none suffers from acute lack of access to major business centres and air gateways;
- Industry Structure:
 - the towns score very differently in terms of industrial structure. Northwich is defined as having a better than average structure while Middlewich and Winsford have 'weak' mixes of commercial activity;
 - within the context of the broader hinterland, scores for all areas decline suggesting that proportionately more higher value added activity tends to be located inside the town centre than immediately outside it;
- Skills:
 - skills scores are all negative though not significantly, with Winsford displaying the least promising set of attributes;
 - within the 5km hinterland, Middlewich and Northwich are consistent with the labour market driver and deteriorate marginally, while the value for Winsford improves;

Fig 12.

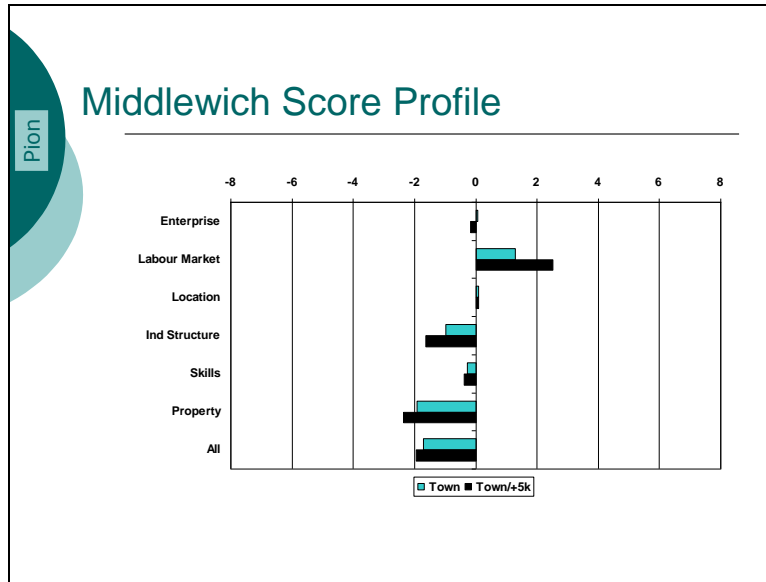


Fig 13.

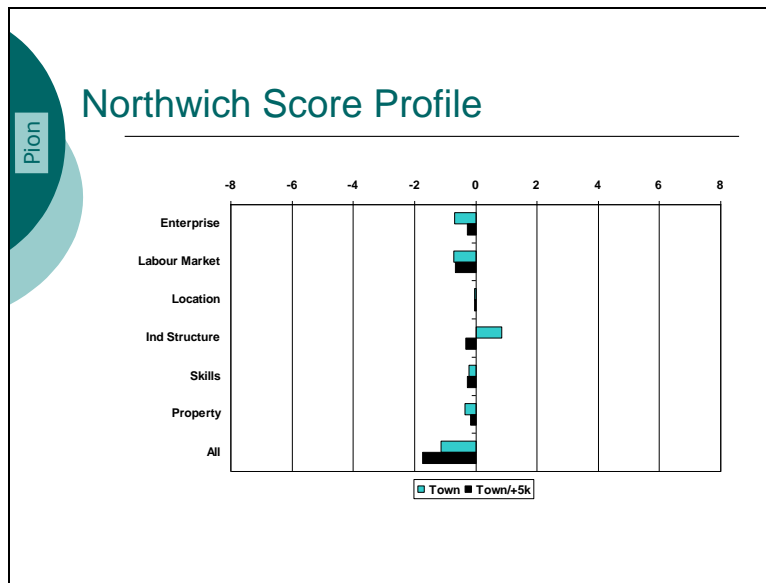
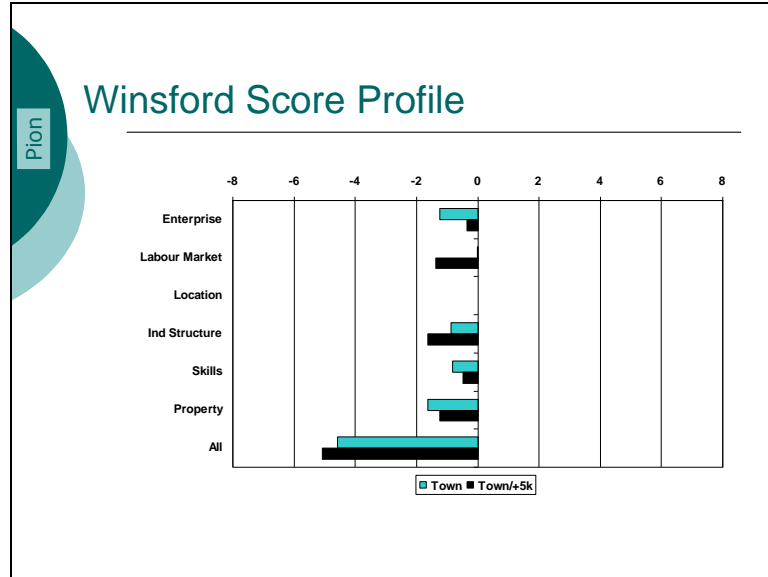


Fig 14.



- Property Mix:
 - all property mix scores are negative though the values of Middlewich and Winsford are significantly more negative than those for Northwich;
 - extending the analysis to the 5km hinterland makes marginal adjustments, the Middlewich score declines but the others increase.

A.2.3 Further insights are given by comparing the scores with the NWDA's Places Study findings for Local Authority Districts across the region. While it is not appropriate to compare individual town values with specific LADs, it is possible to examine where the towns' 'scores' lie in relation to the decile profile of all England LADs and the quartile profile of NW LADs. The table below tends to reinforce the broad findings outlined above. In terms of England placings:

- Middlewich and Northwich contain just one ranking in the top half of the distribution, though for different drivers – labour market for Middlewich and industrial structure for Northwich. There is no Winsford driver in the top half of the distribution;
- Middlewich and Winsford contain two driver placings in the bottom decile – industry structure and property mix for the former and enterprise and property mix for the latter. The lowest decile position for Northwich is a nine for enterprise;

Fig 15.

Weaver Town Placement Comparisons						
	England Decile Placings			NW Quartile Placings		
Driver	Middlewich	Northwich	Winsford	Middlewich	Northwich	Winsford
Enterprise	6	9	10	1	3	4
Lab Mkt	2	8	5	1	3	2
Location	6	7	6	1	1	1
Ind Structure	10	2	9	4	1	4
Skills	6	6	8	2	2	3
Property Mix	10	7	10	4	3	4
All	7	6	9	2	2	3
All (+5k)	7	7	9	2	2	4

A.2.4 The reason for also including NW placings (on a quartile basis due to much lower numbers than the England analysis) is to balance the countrywide and regional perspective. In a North West context, the centres – with the exception of Winsford – fare relatively better.

A.2.5. Middlewich displays three top quartile and one second quartile ranking though property mix and industry structure still rate as poor performing. Northwich has two top quartile, one second quartile ranking and no bottom quartile position. Winsford, however, is ranked within the lowest quartile over three driver groups – enterprise, industry structure and property mix.

A.2.6 Overall, therefore, it is clear that Winsford faces the most severe challenge in terms of economic development. There are no performance driver scores that are above the England average, let alone comparable with high productivity areas. Enterprise performance and property mix are rated as being furthest away from the profiles associated with high productivity areas and both industry structure and skills are also weak.

A.2.7 In terms of the NWDA places study, this equates to a ranking in the second bottom decile of countywide LAD scores and second bottom quartile of NW LAD scores. It is also useful to note that the NW position slips into the lowest quartile when the hinterland of the town is taken into account.

A.2.8 Middlewich also displays something of a weak profile. While the labour market is indicated to be relatively strong, there are weaknesses in most other attributes. Enterprise and skills are moderate at best and industry structure and property mix are indicated to be very weak. This equates to a ranking in the third bottom decile of countywide LAD scores. The fact

that the centre lies in the second quartile of the NW rankings is testimony to the poor status of other parts of the North West rather than the strengths of Middlewich.

A.2.9 Northwich is the Mid Cheshire centre defined as having the best mix of attributes for development. Industry structure is rated as very strong but the overall status of the centre is generated through the moderate position of other attributes compared to the poor position of the other centres, with enterprise attributes rated as the most distant from high productivity areas.

Appendix 3

The Ekosgen report summarises outputs as follows:

A.3.1 Middlewich Outputs

Fig 16.

Output	Middlewich Outputs	Middlewich Town Wharf
Number of new residential units	200-300 within marina development.	n/a
Area of green space created	n/a	n/a
Area of green space improved	4 ha: 3 ha through Middlewich vision (canal side and adjacent land meadow habitat and natural species) plus 1 ha Town Wharf	1 ha
New walking/cycling routes developed	5 (includes tow path and canal and salt heritage trail, linking into canal side trail to be enhanced. Dane Valley way linkages) total 6-7 miles (including Tow Path).	3 km
Area of habitat created	2 ha: 1 ha vision project Croxton Trail Park – reclaimed land fill site which is being developed as a habitat. Plus 1 ha Town Wharf	1 ha
Area of public realm improved (sq m/hectares)	4,000 m ²	0.3 ha
Area of waterway enhanced (m/km)	4 km (but included as an output within Waterways	4 km (but included as an output within

		Waterways
Area of land improved or developed for use (hectares)	93 ha	1 ha
Area of floorspace created:		
Retail 2000	15,278 sq m (includes 11,539 sq m leisure development at Midpoint 18 and 2,739 sq m proposed Tesco store).	1,000 m2
Office (B1)	7,328 Sq m +18 hectares (Centura foods / New Farm)	1,000 m2
Industrial (B2)	126,133 Sq m	1,000 m2
Storage and distribution (B8) 2000	34,000 Sq m	n/a
Number of new visitor attractions/facilities	2 (Marian and Town Wharf)	2
Number of improved visitor attractions/facilities	n/a	n/a
Number of events held	10 per year x 15 (inc Town Wharf, Town Centre etc, all will include venues for performance etc. events manager. In post	3-4 additional pa
Participants in volunteering initiatives	1,300 per year – based on 1 canal and salt town project. evidence	(300-400 per event)
Number of learning/education beneficiaries	1,600	500 (based on likely volunteer training)
Number of healthy living initiatives	Walking/cycling routes (will be others to add – 2009 folk and boat will have healthy produce market)	To be established. Estimated (6,000 users of tow path pa.
New business created	20 (within 14 empty retail units in town centre and 4 new retail units on ex Co-op site)	6-7 small businesses
Existing businesses assisted	95 (86 in town centre plus pub and canal businesses) direct impacts as MW is a MTI 5	n/a
Jobs created	3552	

A.3.2 Northwich Outputs

Fig 17.

Output	Northwich Outputs	Destination Northwich Outputs
Number of new residential units	1,000 (including 185 at Baron's Quay) 1,200 Winnington Urban Village (Growth Point) 1,000 Wincham (Growth Point) 606 Rudheath (Growth Point)	
Area of green space created (ha)	13 (woodland)	
Area of green space improved	200 ha	
New walking/cycling routes developed	30.9 km	
Area of public realm improved (sq m /hectares)	40.5 ha (Gadbrook Park) 7.7 ha (Wincham Business Park) 78,519 sq m (Northwich Vision) 2,163 sq m (cultural centre)	2,163 (cultural centre)
Area of land improved or developed for use (hectares)	4 ha (Destination Northwich)	4,439 sq ft (Northwich Woodlands)
Area of floorspace created:		
Retail	34,804 m2 (Northwich Vision)	150 m2 (Northwich Woodlands)
Office (B1)	17.5 ha to be developed (Lostock Triangle) 24,00 m2 (Northwich Vision)	209 m2 (Northwich Woodlands)
Storage and distribution (B8)	7,250m2 (Northwich Vision)	
Number of new visitor attractions/facilities	1 (Riversdale Bridge replacement, Connect2) 1 Northwich Woodlands 1 Baron's Quay 1 Wincham Wharf	1 Lion Salt Works 4 - Cultural Centre (theatre, library, salt museum and TIC = 4,200 m2)

	1 Rudheath Marina 1 multi-screen cinema (Barons Quay) Total = 6	1 - Classroom conference facility – seats 40 - 860 sq ft 1 - New café seats 40-60 people + 4 FTE jobs. (1 sq m per person) = 64 sq m = 689 sq ft Total = 7
Number of improved visitor attractions/facilities	1 (Anderton Boat Lift)	
Number of events held	1 Thundersprint	4 (Lion Salt Works) 2 a year (Northwich Woodlands)
Participants in volunteering initiatives	400 volunteering days	40 per year (Northwich Woodlands)
Number of learning/education beneficiaries	300 per year	30 per year (Northwich Woodlands)
Number of healthy living initiatives		2 a week (Northwich Woodlands)
New business created	44	2/3 craft start up units (Northwich Woodlands)
Jobs created	2,261	

A.3.3 Winsford Outputs

Fig 18.

Outputs	Winsford Direct Outputs
Number of new residential units	1,000
Area of green space created (ha)	0.8
Area of green space improved (ha)	3.6
New walking/cycling routes developed	4
Area of habitat created	1.6
Area of public realm improved (sq m/hectares)	2.4
Area of waterway enhanced (m/km)	4.8 km
Area of land improved or developed for use (hectares)	3

Area of floorspace created:	5,000 m2
Retail 2000	2,000 m2
Office (B1)	1,000 m2
Storage and distribution (B8) 2000	2,000 m2
Area of floorspace improved:	
Retail	2,000 m2
Office	1,000 m2
Number of new visitor attractions/facilities	9 (Inclined Plane, Marina, Hotel; Bottom Flash multi user loop; salt works relocation to open up underground cavern; and Newbridge visitor facility, 2 x improved car park/picnic area (at Newbridge and All through School site).
Number of events held	2
Number of additional volunteering days	240
Number of learning/education beneficiaries	425 per year
Number of healthy living initiatives	6
New business created	n/a
Existing businesses assisted	25
Jobs created	1,293