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1. INTRODUCTION

1.1 The Mersey Gateway is a £390 million project that would provide a new bridge over the River Mersey between the towns of Runcorn and Widnes. It is principally needed to bring about much needed traffic relief for the existing Silver Jubilee Bridge, which is used by over 80,000 vehicles every weekday and ten times the number it was originally designed for. However, the project is ‘more than just a bridge’ – it is the catalyst that will connect communities and lead regeneration and investment throughout Halton, Cheshire, the Liverpool City Region and the North West.

1.2 The Regeneration Strategy is an important element of the Mersey Gateway project. It is anticipated that the entirety of direct and indirect effects will lead to the creation of a significant number of permanent jobs and a £40 million per annum additional increase in economic performance across the region, thereby making it one of the North’s most important priorities. The regeneration benefits are truly wide-ranging – increased accessibility between where people live, work and visit, dedicated provision for better public transport provision across the Mersey and a chance to build new homes, shops, offices and leisure facilities.

1.3 The purpose of the Regeneration Strategy therefore is to detail the wide ranging economic, social, physical and environmental regeneration opportunities that the Mersey Gateway could potentially deliver. The adopted vision for Mersey Gateway is that it is ‘more than just a bridge’; it is about unlocking economic regeneration and providing the catalyst for the continued renaissance of Halton and the Liverpool City Region. The Regeneration Strategy therefore seeks to provide the vehicle by which these opportunities are developed and delivered.

1.4 The Strategy will also be an important tool in informing the next iteration of Council policy – the Community Strategy, the Corporate Plan, and the Local Development Framework. The latter will be particularly important as the Regeneration Strategy will directly inform the production of a Supplementary Planning Document for Southern Widnes.
1.5 The Regeneration Strategy will also inform the Council’s priorities for physical investment and urban renewal going forward. This builds upon the remarkable progress that the Council has made in delivering major regeneration schemes and attracting private sector investment throughout Runcorn and Widnes.

Background to the Study Area

1.6 The Regeneration Strategy covers an area of 20.6 square kilometres (figure 1.1) within the borough of Halton. It covers an area of Widnes to the south of the town centre, to the east of the Mersey Multimodal Gateway and to the west of the Widnes Waterfront Economic Development Zone. The Regeneration Strategy also covers a larger expanse of Runcorn, including the Old Town, Halton Lea and the Astmoor Industrial Estate. The Regeneration Strategy also includes the existing Silver Jubilee Bridge as well as the proposed route of the new Mersey Gateway.

1.7 The defined area was agreed with Halton Borough Council to provide a planning basis for policy development.

The Liverpool City Region

1.8 The Regeneration Strategy sits within a wider strategic investment context that is the Liverpool City Region (figure 1.2). The city region comprises the city of Liverpool and stretches from West Lancashire and the Sefton coast in the north through to Chester in the south and into North Wales and eastwards to Warrington.

1.9 The city region economy contributes a 40% share of the North West region’s Gross Value Added contribution – a £106 billion economy¹ – and over a third of its jobs – 2.98 million across the region. Moreover, it is ‘an economy on the move’ and one of the fastest growing city-regions in the UK. It is predicting fast short term growth of some 50,000 jobs by 2010² with productivity growth exceeding regional and national averages.

1.10 That said, economic challenges and constraints remain. Economic inactivity and worklessness remain barriers to raising productivity, which when coupled with some of England’s most deprived localities, represents a long term programme of sustained regenerative investment in the City Region’s communities.

¹ Northwest Development Agency (June 2007) Baseline Update Report
² The Mersey Partnershi$p (2005) City Region Development Programme
1.11 An important ambition of the City Region is to create a ‘well connected’ and ‘premier destination’. This is in part driven by the continued investment in Liverpool city centre and the Mersey Waterfront in which the 2008 Capital of Culture represents a showcase to propel both City and the City Region onto the global stage. Taken together this represents an investment programme of over £2.9 billion.

1.12 The strategic aim to be ‘well connected’ seeks to maximise the benefits of the common ownership of the Port and John Lennon Airport, and the supply chain hinterland, serving the North of England. The expansion of Liverpool John Lennon Airport is based on forecast growth of 12.3 million passengers per annum and cargo activity to around 220,000 tonnes per annum by 2030 – an investment in excess of £600 million.

1.13 The Mersey Gateway is therefore a vital investment project in improving the connectivity of the City Region and in optimising the investment delivered and planned in the core of the City Region. It also greatly enhances access to national and international transport networks and markets and will be instrumental in connecting the core to the outer reaches of the City Region, embracing Warrington, West Cheshire and North East Wales – a significant economic asset base with high levels of productivity and several very important clusters and sectors including automotives, aerospace, chemicals and professional services.

Halton – Widnes and Runcorn

1.14 Halton is an area of great physical, economic and commercial diversity. For all of its economic successes (Section 4) it is one that demonstrates many significant economic and social problems, akin to many inner-city metropolitan areas. This, in part, stems from the industrial legacy of the borough and also through some of the undesired outcomes of the New Town programme. Yet, since the 1970s, the borough has undergone a sustained programme of restoration, reclamation and redevelopment. Since 1974, over 400 hectares of contaminated or derelict land has been brought back into productive use at a cost of £40 million.\(^3\)

1.15 The latest phase of regeneration – the Council’s Urban Renewal Programme – has seen the delivery of a number of major projects (figure 1.3) over the past 20 years. This represents an investment programme of over £524 million in a range of physical regeneration projects, including town centre renewal, public realm, reclamation works and the delivery of the Regional Strategic Development Sites at Widnes Waterfront and the Mersey Multimodal Gateway (3MG).

\(^3\) Halton Borough Council Major Projects Department (2007) Projects Portfolio – This does not include cost for Daresbury SIC
Figure 1.1 Mersey Gateway Regeneration Strategy Study Area
Figure 1.2 Halton within the Liverpool City Region

1. Revitalised Liverpool City Centre
   - 2008 Capital of Culture
   - Grosvenor Liverpool One
   - Kings Dock
   - Liverpool Science Park
   - Commercial District Expansion
   - Liverpool Waters
   - Liverpool Lime Street Gateway
   - City Centre Movement Strategy
2. Expansion of John Lennon Airport
3. Mersey Gateway
4. Omega Regional Investment Site
5. Deeside Hub
6. 3MG
7. Widnes Waterfront EDZ
8. Daresbury Science and Innovation Park
10. Knowsley Innovation and Technology Park
11. West Coast Main Line Improvements
12. Liverpool South Parkway Interchange
13. Expansion of the existing Knowsley Rail Freight Terminal
14. Wirral Waters

Mersey Waterfront Regional Park
However, regeneration is typically described as being 'more than just bricks and mortar' - such a holistic approach has been adopted by Halton Borough Council. Between 2001 and 2008, the Local Strategic Partnership will have delivered more than £30million to help improve services, prospects, and quality of life for local people through the Neighbourhood Renewal Strategy. The Partnership body as a whole invests some £450million annually across the borough through mainstream funding in addressing the targets of the Community Strategy. The Local Area Agreement for Halton (2007 to 2010) will see a further convergence and alignment of local priorities and spending making for more efficient resource delivery.

This represents the investment context in which the Mersey Gateway will be delivered. The vision for the project is to provide a transport solution to better provide for local and regional needs and by unlocking economic regeneration locally, further enhancing the contribution of Widnes and Runcorn to Merseyside’s economic renaissance. The Mersey Gateway should therefore be seen as both a catalyst for regeneration in its own right but also a fundamental piece of the regeneration ‘jigsaw’ that is being carefully placed together across Halton and the City Region.

The Silver Jubilee Bridge – the only river crossing between the Mersey Tunnels and Warrington – is of strategic importance to the performance and growth of the City Region’s economy. As the volume of traffic using the bridge is well in excess of capacity and as pressure heightens on an already congested M6 motorway, the additional costs to businesses, residents and visitors in both cost and time is having a dampening effect on the movement of capital and resources, which ultimately will severely undermine the regeneration programme underway.

The Approach to Regeneration

The Mersey Gateway Regeneration Strategy adopts a more narrowly defined spatial remit than the Local Strategic Partnership and Halton Borough Council’s approach to holistic regeneration, as conveyed through the Community Strategy, Corporate Plan or the Economic Strategy (Gateway to Prosperity). However, the Mersey Gateway is no less concerned with the delivery of holistic regeneration – as this relates to the need for good governance and service delivery and providing places where people want to live, visit and work – that these corporate strategies direct.

Indeed, for this to represent a credible strategy, it will be important to set the Mersey Gateway Regeneration Strategy within the envelope of this wider strategic approach. The
respective vision statements, the objectives and the targets, will therefore apply and effectively establish the higher-level strategic objectives of the Regeneration Strategy.

1.21 It is important therefore not to assume that the corporate strategies themselves operate as a fixed entity in time. These are also evolving and through a more considered performance management framework, over time there will be a convergence of investment on the key priorities set out in the Local Area Agreement.

1.22 Furthermore, the Government’s review of Sub-National Economic Development and Regeneration plans to refocus both powers and responsibilities to support this, giving local authorities a greater role in ensuring economic opportunity for all, including strengthened powers and incentives to support prosperity, reinvigorate economic performance and make changes to work more effectively with business to better support growth. New Multi-Area Agreements will be defined and local authorities will have a greater say in setting more focused priorities for economic regeneration.

1.23 The Mersey Gateway Regeneration Strategy will seek to identify new physical opportunities for change as part of a necessary aim to create high quality, desirable and sustainable ‘places’, thereby building upon and adding value to the considerable levels of investment delivered and planned.

1.24 The scheme will have a significant influence on the patterns and distribution of employment, housing, retail and leisure. It will displace existing land uses, in situ but also inevitably across a much wider area, to which the Local Development Framework will address. The scheme will be the catalyst for localised intervention in which the land assembly for the construction of the bridge, the ‘de-linking’ of redundant infrastructure, and the desire to integrate the scheme within the urban environment, will create new development opportunities. The purpose of the Regeneration Strategy is to identify these as part of a comprehensive and sustainable approach.

1.25 Sustainability is at the forefront of the Regeneration Strategy. A formal Sustainability Assessment, Strategic Environmental Assessment and Appropriate Assessment have been undertaken alongside the preparation of the Strategy itself.

1.26 For the area of Southern Widnes (Impact Area 1), a Supplementary Planning Document (SPD) will be produced. It has been included within the Local Development Scheme 2007. Its intended role is to provide the policies and proposals for the comprehensive regeneration
of the Southern Widnes Area. This SPD will be produced in line with and linked to Policy RG1 of the Halton UDP.

**Report Structure**

1.27 This Issues Report has been prepared in support of the Regeneration Strategy and Supplementary Planning Document. It seeks to draw together the evidence of the issues, which will inform the process of establishing the vision for regeneration ("what we are seeking to achieve") and the preferred option underpinning the strategy ("how we will get there").

1.28 This report is structured accordingly:

- Section 2 introduces the scheme;
- Section 3 sets the policy context;
- Sections 4 & 5 establish the economic and commercial market context;
- Section 6 presents an analysis of the local business attitudes to the Mersey Gateway;
- Section 7 presents an overview of housing markets;
- Section 8 outlines the regeneration issues facing the borough;
- Section 9 details our Quality of Place framework; and
- Section 10 considers a "Character Area Analysis" to take forward to the next stage of concept, and option, generation.
Figure 1.3 Regeneration in Halton
2. **A BRIDGE TO PROSPERITY**

2.1 The purpose of this Section is to introduce the project in more detail. This is in terms of the design and the detail of the route that it will take. However, as stated in the previous Section, the Mersey Gateway is 'more than just a bridge' and the purpose of the Regeneration Strategy will be to explore the regenerative and economic growth benefits of the scheme. This Section therefore concludes with a narrative on the modelled economic growth outcomes of the Mersey Gateway project and how through enhanced accessibility and mobility, we can start to explore how local regeneration will be delivered in the area.

**The Mersey Gateway**

2.2 The Mersey Gateway Project is a proposed Private Finance Initiative project that received Programme Entry status in March 2006. The case for an additional crossing of the Mersey at Halton dates as far back as 1978, in which a number of options for route alignment have been considered culminating in the submission of a Major Scheme Appraisal to the Department for Transport in July 2003 as part of Halton’s Local Transport Plan.

2.3 The main objectives of the Mersey Gateway Project are

- to relieve the congested Silver Jubilee Bridge, thereby removing the constraint on local and regional development and better provide for local traffic needs;
- to apply minimum toll charges to both Mersey Gateway and the Silver Jubilee Bridge consistent with the amount required to satisfy affordability constraints and to manage road travel demand to ensure the delivery of transport and environmental benefits by maintaining free flow traffic conditions on the MG and SJB;
- to improve accessibility in order to maximise local development and regional economic growth opportunities;
- to improve local air quality and enhance the general urban environment; and
- to improve public transport links across the river and to encourage the increased use of cycling and walking.

2.4 It is anticipated that, following a successful outcome of a Planning Inquiry, that the Mersey Gateway will be opened in 2014.
The Design

2.5 The Mersey Gateway Bridge will be a landmark structure that will be instantly recognisable throughout the North West and beyond, in much the same way as the existing Silver Jubilee Bridge.

2.6 The scheme comprises 2.4 km of new dual 3-lane highway, a major river estuary crossing and several crossings of other obstacles (i.e. road, canals and a railway).

2.7 The most striking feature of the scheme is the River Crossing Bridge which has a total length of 2.4km. The bridge crossing will consist of approximately 600m of approach spans to the north of the Mersey Tidal Estuary and 800m to the south. The tidal estuary crossing itself will consist of 1000m of cable-stayed bridge consisting of 4 spans supported by 3 towers. Typical lengths of the approach spans are 70-100m with a construction depth of around 6m. The 3 towers of the cable-stayed spans are likely to be concrete below the superstructure and steel above. The overall height of the towers would be around 120-140m above the river level.

2.8 The bridge superstructure could be of concrete or steel or, as is more likely, a combination of both (the indicated form is for concrete top and bottom slabs forming the flanges of the girders with steel cross-bracing to form the webs). It is anticipated that the bridge deck would be prefabricated in units of approximately 5m lengths and manufactured remotely from the site; this has a strong influence on the form of construction.

2.9 The cable-stay structure design similar to the second Severn Crossing but the inspiration for the design perhaps lends itself to the Grand Viaduc du Millau in southern France, one of two groundbreaking European multi-span cable stayed bridge (the other crossing being the Corinth canal in Greece). Designed by Foster and Partners, the world's tallest bridge structure is over twice the height of the Mersey Gateway. An important part of this design brief was to mitigate the visual intrusiveness of the bridge on an area of high landscape appeal.

2.10 Sustainability is key to the delivery of the Mersey Gateway and has been central to its design. With regard to greenhouse gases, the scheme is predicted to reduce vehicle carbon dioxide emissions as a result of reduced congestion and journey distances. Within the current design phase, the minimisation of environmental impacts has been decisive in the design solutions proposed, for example avoidance of community disturbance via route selection and the design and positioning of bridge piers to minimise impacts on the river system.
2.11 Further, an Upper Mersey Estuary Nature Reserve has been proposed as part of an Upper Estuary Management Plan being prepared by Halton Borough Council. This is in its early stages of development, arising as a result of the Mersey Gateway Project, together with other borough-wide projects.

The Route

2.12 From the existing A562 Speke Road, the route would then head eastwards towards a new junction called the Ditton Interchange, which would replace the Ditton roundabout. It would then progress across the land currently occupied by the industrial units either side of Ditton Road and head over the Garston to Tirperley rail freight line and the existing A557 Widnes Eastern Bypass, before crossing the Catalyst Trade Park and the western corner of the ThermPhos Chemical Works.

2.13 A new junction (the Widnes Loops Junction) would be formed with the A557 at this location. The route would then continue south east to Runcorn.

2.14 It would cross St Helens Canal, Widnes Warth Saltmarsh, Astmoor Saltmarsh and Wigg Island, as well as the Mersey Estuary itself, before turning southwards over the Manchester Ship Canal and across Astmoor Industrial Estate on the southern side of the river.

2.15 It would connect into the existing road network in Runcorn by joining the Central Expressway and would join up with the M56 Motorway at Junction 12 to the south of Runcorn.

2.16 The project is being planned on the basis that traditional toll plazas will be required. However, in the years leading up to the start of construction, new technology may offer a different solution for the collection of tolls, if they are needed.

2.17 The three new tolling plazas for the Mersey Gateway river crossing will be located in Widnes. The main tolling plaza, which would be just to the north west of the current Ditton Roundabout and would be 2 lanes of traffic spreading across 8 tolling lanes for north and south bound vehicles. The second and third tolling plazas would be located on the slip roads from the new Ditton Interchange and on the new link with the A557 Widnes Eastern Bypass at the Widnes Loops junction.

2.18 The Silver Jubilee Bridge would be tolled from booths constructed on the existing infrastructure on the Widnes side of the river.

5 The south side of Ditton Road falls within the 3MG Masterplan
2.19 The Mersey Gateway project would reduce the volume of traffic crossing the Silver Jubilee Bridge by directing the natural movement of through traffic over the new crossing, a process known as 'de-linking' (the physical process of removing unnecessary pieces of highway infrastructure).
2.20 This would free up the Silver Jubilee Bridge so it would provide a local link across the river between Widnes and Runcorn, and existing direct bus services between Runcorn and Widnes will remain. Improving public transport between the town centres of Runcorn and Widnes is an important objective of the scheme.

2.21 The de-linking of redundant road infrastructure will create new development opportunities and herein the chance to physically regenerate and improve a number of Halton’s local centres and neighbourhoods. This includes a significant tract of land within both Southern Widnes and Runcorn Old Town:

2.22 The Mersey Gateway would require modifications to existing motorway links in order to ensure effective transfer of traffic from the M56 onto the new crossing.

**More than Just a Bridge**

2.23 The vision underpinning the Mersey Gateway project is that it is to be viewed as ‘more than just a bridge’. For the purposes of the Regeneration Strategy this is particularly resonant. This will be the vehicle by which the local economic regeneration benefits will be identified and delivered.

2.24 Since 2003, AMION Consulting has been appointed by Halton Borough Council to prepare an Economic Impact Report\(^6\) to identify the economic impacts of the proposed Mersey Gateway project. Two important conclusions are drawn when assessing the local economic benefits.

**Labour Market**

2.25 An initial economic assessment of travel-to-work distances by those travelling to work by car (drivers and passengers) helped define a Regeneration Area, by which the impacts of the bridge could be measured. The initial assessment indicated that some 15% travel less than 2km, 70% travel between 2km and 20km, a further 8% travel between 20km and 30km, and 7% travel more than 30km. These distances were mapped against time and indicate that the main area of impact of the proposed Mersey Gateway is likely to fall within a 40-minute drive time of the new crossing.

2.26 Hence, the defined Regeneration Area for measuring the economic impacts of the project was drawn for a wide catchment with the borough of Halton as the clear focus area but with

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\(^6\) An updated Impact Assessment is due to be prepared in 2008 in support of the revised traffic modelling exercise currently underway.
the functional boundaries taking in the Merseyside districts of Knowsley, Liverpool, St Helens, Sefton, and Wirral. This clearly is a wider defined boundary than that under immediate consideration of the Mersey Gateway Regeneration Strategy (figure 1.1) but serves to demonstrate the wider sub-regional economic impacts that the crossing is predicted to have.

2.27 This is an important consideration when trying to assess local economic regeneration impacts, as it holds that in the 'no-project' scenario, residents of the Mersey Gateway Regeneration area are already accessing job opportunities elsewhere (and hence travel-to-work trips are not purely self-contained here). With the continued growth in financial, business and professional services anticipated in the core of the City Region, one might reasonably expect such pull-factors to be an increasing influence going forward.

2.28 This is of course not to ignore that there are a number of local employers within the Mersey Gateway Regeneration Area that do access their employment from within the same origin-destination area. Evidence suggests that residents of West bank area, for example, show a high propensity towards extremely short travel-to-work distances (figure 8.20).

Business Competitiveness

2.29 In terms of assessing the economic impacts of the Mersey Gateway upon business competitiveness, a questionnaire survey was undertaken, supplemented by a number of face-to-face interviews with key businesses, in the Amion defined Regeneration Area. This is an important area of investigation as this drives income and wealth and associated regeneration outcomes.

2.30 The responses to the Business Survey clearly demonstrated that constraints on movement were identified as the primary weakness of the location of their business for the majority of businesses, including those located near the Silver Jubilee Bridge.

2.31 This is despite the fact that the overwhelming response when questioned on the major strength of their business location was access to the motorway network, a key message further reinforced when an average of 70% of all business across all districts stating that the movement of goods by road was important to their activities with a considerable proportion of their customers and suppliers being dispersed widely across the region.

2.32 The evidence therefore indicates that delays caused by congestion on the Silver Jubilee Bridge are undoubtedly inhibiting economic growth.
2.33 Specific reference in this respect was also made to both Liverpool John Lennon Airport and the Ports of Garston and Liverpool. In particular, Liverpool John Lennon Airport is directly affected by the ability of passengers to access the airport in a timely manner, and made particular reference to the negative effect of the current Silver Jubilee Bridge on passengers. In addition, the Port of Liverpool, and to a lesser extent the Port of Garston, are dependent on high quality road access.

2.34 The Mersey Gateway is also of strategic importance to the development of the emerging Merseyside biotechnology-technology sector, linking an expanding Daresbury SIC with biotechnology-technology companies in Speke and the University of Liverpool research centres at MerseyBio, the Liverpool School of Tropical Medicine, and the Cancer Research Centre. Significant competitive benefits will accrue to the Port of Liverpool, regional distribution centre such as Wincanton, in Halton and News International and QVC in Knowsley, as well as the automotive sector – Jaguar at Halewood and Vauxhall in Ellesmere Port.

2.35 Finally, Amion concluded that the Mersey Gateway will also have an impact on business expansion and inward investment particularly in response to increased demand for business and warehousing premises as locations become more attractive as a result of the new crossing.

2.36 Their analysis suggests that an additional 9.99ha of (Halton district) allocated employment land could be developed in the Regeneration Area as a result of the construction of the proposed Mersey Gateway over the period 2012-15.

2.37 For Halton, employment land take up (as a 10-year average) has been some 15.3 hectares per annum and the additional demand for land arising from the bridge may also start to exacerbate a what is becoming a very real issue for the borough – the availability of future employment land, of the right quality, available for local company expansion. The BE Group and Tushingham Moore\(^7\) quote only 19.79 hectares available for local companies to grow against some 120 hectares allocated for strategic, regional use.

\(^7\) BE Group / Tushingham Moore (2007) Halton Property Study
3. REGENERATION POLICY CONTEXT

3.1 This section looks to summarise the policy context as this informs the future of public policy and investment in Halton and therefore the Mersey Gateway Regeneration Strategy study area. The fuller review of policy is contained within Appendix 1 but the purpose of this section is to distil the key themes as these impact upon the area, from the global to local.

Global Perspectives – Sustainable Economic Growth

3.2 The UK has enjoyed an unprecedented period of economic growth since emerging from the recession of the early 1990s. Its economy has been described as a “paragon of stability” by the OECD and growth in Gross Domestic Product (GDP) has been uninterrupted and less variable than the other G7 nations. However in projecting forward, the UK faces a period of increasing uncertainty in which structural weaknesses will become ever more apparent in the face of growing competition from overseas. The structural weaknesses that the UK economy exhibits include low levels of labour force productivity, high levels of the workforce on incapacity benefit and a low level of innovation.

3.3 The UK economy and that of its regions face increasing competitive pressure for investment, labour force and productive power. According to theories of globalisation, this competitive pressure extends from trade with other developed nations as well as trade with low wage competitors such as India and China. This is not a new story, rather it is concerned with the competitiveness of UK businesses in the face of open trade and footloose investment capital. As the Work Foundation has recently commented in their report on Knowledge City Regions, the real change that has been experienced in the last decade is concerned with the pace of economic change which has been linked to technological advancement, the extension of the market place and the application of knowledge to trading.

3.4 In response to these pressures there is a concerted EU and UK policy drive towards encouraging knowledge based industry and the competitive advantages to be gained through the application of knowledge. This is a policy drive that has been taken up by the Northwest Development Agency through the latest iteration of the Regional Economic Strategy and is a stated commitment in the Liverpool City Region Development Programme.
The Importance of the Knowledge Economy

3.5 The knowledge economy is a well researched concept that has helped to shape EU and UK competitiveness policy over the last decade. In 1998 the DTI (now the Department for Business, Enterprise and Regulatory Reform) defined the knowledge economy as follows:

"...one in which the generation and the exploitation of knowledge has come to play the predominant part in the creation of wealth. It is not simply about pushing back the frontiers of knowledge; it is also about the more effective use and exploitation of all types of knowledge in all manner of economic activity."

3.6 The DTI identified a series of knowledge economy drivers which can be used to understand changing industrial, investor and consumer contexts. They are:

- Development of ICT which has facilitated transfer of knowledge at an accelerated rate and increased access to knowledge on a global scale and assisted in the process of knowledge "diffusion".

- Heightened levels of investment in scientific research and business research and development has increased the stock of knowledge that is available to exploit in a commercial business context. When combined with the diffusion effects of rapid ICT assimilation, knowledge has permeated industry at a faster rate than previously experienced.

- Global competition has been facilitated by the liberalisation of trade coupled with ICT developments. This has served to increase the size and geographic extent of firm’s markets for products and services. It has also necessitated a quicker assimilation of knowledge into mainstream business activity in order to realise the competitive advantages.

- Changing consumer demand associated with rising levels of prosperity, a greater emphasis on non-essential expenditure including leisure and quality of life aspects, greater concern for environmental well being and increasing pressure on companies to reduce their dependency on physical resources has increased consumer demand for services and knowledge enhanced products.

3.7 Support for advancement of the knowledge economy was recognised and endorsed by member states at the Lisbon European Council of March 2000. This Council stated a commitment to working towards the goal of the EU economy becoming:

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“the most competitive and dynamic knowledge based economy in the world, capable of sustaining economic growth with more and better jobs and social cohesion”.

3.8 This commitment was reinforced at the Barcelona European Summit of 2002 at which EU governments signed up to raising research and development expenditure to 3% of GDP by the year 2010. This commitment was made in recognition of an emerging gap in innovation terms between the EU and its economic competitors.

3.9 The conclusions of the Barcelona Summit were reiterated at the 2005 European Spring Council, with the Commission identifying “knowledge and innovation for growth” as central to the competitive development of the European economy.

3.10 In summary, there has been a strong drive from EU level compelling member states to focus resources and policy initiatives towards accomplishing an economy that is founded on research and development, knowledge and innovation. This sets an important context for the Mersey Gateway Regeneration Strategy.

**National Policy Drivers**

An Emerging Agenda

3.11 The early days of the Brown administration has seen a marked change in the emphasis of national policy. Restructuring to Government departments and portfolios has been matched by a review of regeneration policy that closely adheres to the global challenges facing the UK as outlined above. It is a policy shift that whilst careful not to be seen as a wide ranging departure from the previous ten years of policy making, is certainly one in which new priorities are emerging.

*Review of Sub-National Economic Development and Regeneration*

3.12 The challenges of enhancing the UK’s offer in the knowledge economy remain demanding. The Northern Way illustrates the scale of the task that the North alone faces with a £30billion investment gap with the rest of the UK, which itself continues to lag behind other G7 comparators.

3.13 The Northern Way has in particular highlighted the fact that the challenges of reducing disparities between regions and localities are likely to be exacerbated by economic change and global influences. The National Review has taken that analysis one stage further and suggested that for the UK, further specialisation may be required and specifically further
concentration on the high value-added activities in which the UK firms has a comparative advantage, including in services such as business, legal, creative and financial services.

3.14 Regions with clusters of sectors in high value-added manufacturing and services stand to gain from shifting comparative advantage, particularly as the importance of high value services grows. Similarly, regions with sectors that are early adopters of new environmental technologies, such as greater resource efficiency and low-carbon innovation may also gain from comparative advantage.

3.15 The National Review is effectively a position statement of intent. It recognises the need for further reforms so that localities are able to provide an economic environment which enables firms to adapt to and create new technologies and opportunities. For the ‘economy’ of Halton, the messages are clear: a need to continuously move towards higher value activity, to build upon its own comparative advantage and specialisms in a City-Region wide context and to utilise its unique and distinctive qualities of place to fully complement those around it.

3.16 It is also a ‘watching brief’ at present. New proposals include a statutory focus on economic development and neighbourhood renewal at the local level linked to an agreed performance management framework. New reforms to the way that transport, housing and education is delivered in support of this new economic focus, are also suggested. Further, with a proposal for a single regional strategy mooted, then the policy context as this shapes public investment strategies is set for a quite radical overhaul over the coming years and phase of the Mersey Gateway project.

*Homes for the Future: More Affordable, More Sustainable (2007)*

3.17 The Government has established a new vision for housing supply through the Green Paper

"We want everyone to have access to a decent home at a price they can afford, in a place, where they want to live and work. Good quality, affordable housing enables stable and secure family lives: we are all healthier, happier and wealthier when we have decent homes close to schools, healthcare and transport links.

But this is not just an issue for families. Good housing can improve our social, environmental and economic well-being. It helps create better communities that can attract investment and skilled workers. And getting the design right can also improve the environment and reduce our carbon footprint"

3.18 Government has set out a new target for the provision of new homes based upon a clear mismatch in the supply and demand for housing – the housing stock is growing by 165,000 a
year yet the number of households is projected to grow at 223,000. The new target is to
deliver 2 million homes by 2016 and 3 million homes by 2020. By 2016, this roughly equates
to for every two completions, there will need to be three.

3.19 The supply of new homes is linked to an incentivised Housing and Planning Delivery Grant,
with consequences for those authorities that do not allocate sufficient land for five-year
supply of housing. For the drivers of housing market in Halton – whereby population is
expected to remain static to 2021 but crucially where there is set to be a growth of over 40%
in population over 65\(^6\) - this should require careful consideration not just of the land supply
and numbers of new homes, but particularly the types, sizes and community infrastructure to
meet new and emerging market trends.

3.20 English Partnerships will have an important role in the delivery of these additional homes,
particularly when charged with their remit in the disposal of surplus Government land and
their expertise in the brokerage of partnerships between public and private sectors in the
delivery of housing-led regeneration schemes.

3.21 There is also an expectation that new housing needs to be much more sustainable for the

3.22 As part of the new homes programme, there is an £8 billion programme for affordable
housing in 2008-11, a £3 billion increase compared to the previous three years, which will
help deliver at least 180,000 new affordable homes over the next three years, and more than
70,000 affordable homes a year by 2010-11 – with an ambition to increase further in the next
spending review. This will include at least 45,000 new social homes a year by 2010-11 (a
50% increase in social housing in 3 years, more than doubling new provision since 2004-05)
and a goal of 50,000 new social rented homes a year, in the next spending review period.
Over 25,000 shared ownership and shared equity homes a year funded mainly by the
Housing Corporation.

Planning for a Sustainable Future

3.23 The Planning White Paper sets out our detailed proposals for reform of the planning system,
building on Kate Barker's recommendations for improving the speed, responsiveness and
efficiency in land use planning, and taking forward Kate Barker's and Rod Eddington's
proposals for reform of major infrastructure planning.

3.24 It sets out clearly Government’s intentions for the planning system – how this responds to the challenges of economic globalisation and climate change:

- **Climate Change** – setting out how the planning system will help to deliver the targets for the reduction in greenhouse gases by for example, supporting the building of zero-carbon homes and business premises that are low energy and produce lower carbon emissions; locating development to reduce the need to travel; making walking and cycling accessible, attractive and essential components of new development; supporting integrated public transport; enabling the shift to renewable and low carbon forms of energy; and ensuring that new development is resilient to the consequences of flooding.

- **Supporting sustainable economic development** – ensuring that the planning system responds to the needs of businesses and changes to market conditions in a way that is consistent with wider environmental and social objectives.

- **Increasing the supply of housing** – demographic pressures are putting pressures on the housing market in a way almost without precedent in the UK and the role for the planning system is to support housing growth so that people’s aspirations for good quality, affordable housing can be met;

- **Protecting and enhancing the environment and natural resources** – recognising the role that planning has in protecting and enhancing the quality, character and amenity value of the countryside and townscapes.

- **Improving our local and national infrastructure** – taking forward the whole ethos of the Sustainable Communities agenda in recognising that the planning system in planning for housing growth also needs to ensure that investment comes forward in infrastructure, public services and commercial and leisure facilities.

**Existing Policy Framework**

3.25 As the previous sub-section detailed, there is a new shift in Government thinking towards new priorities, as set out in their various consultation draft Bills, White Papers, Green Papers and Policy Statements. However, there remains an extant policy framework that holds a significant degree of relevance still.

3.26 Here, we (briefly) review this.
Sustainable Communities Plan (2003)

- A national long-term programme to deliver sustainable communities in urban and rural areas, through tackling issues of low housing demand, and making improvements to the quality of residential environments. Remit of this policy was extended in 2005 by the two five year plans – ‘Homes for All’ and ‘People, Places and Prosperity’, which are aimed at providing affordable housing, as part of the process to alleviate social exclusion, and to examine the role and input of local communities in the decision making process.

Sustainable Communities Plan – ‘Homes for All’ (2005)

- A nationwide 5 year programme that the provision of high quality homes, be they owner-occupied, social rented, or private rented, is met and adhered to. Policy also sets out to limit the number in temporary accommodation, help more people to own their home, and to cater for those with alternative housing demands. Furthermore, the 5 year plan is designed to protect and enhance the environment, and to create sustainable mixed communities with jobs and services for all.


- The policy sets out how to achieve sustainable patterns of urban and rural development. Principal concern is with how spatial planning should contribute to reducing emissions and stabilising climate change, with climate change considerations integrated into all spatial planning concerns, including housing, transport, economic growth and regeneration. Policy calls for more efficient use of resources, developing mixed-use communities to help achieve sustainable economic development, and to reduce the need to travel.


- PPS3 sets national housing policy in accordance to the Government’s wider aim of delivering sustainable development through the planning system. The statement’s key goal is to provide a more flexible and responsive supply of housing land tailored to meet local specific needs, such as affordability, mix, and density.


- Draft PPS4 encourages mixed-use development and places a stronger emphasis on regeneration, particularly in deprived areas and requires LPA’s to prioritise deprived areas for regeneration. A mixed-use approach focuses on allowing the market to bring
forward proposals that better reflect the requirement for homes, employment and services to be located in close proximity to each other.


- The guidance continues with the theme of sustainable development, with a particular emphasis on town centres and the provision of commercial and retail facilities, so as to promote greater vitality and viability of the nation’s town centres; enhancing consumer choice with more availability in shopping, leisure, and local services.


- This policy sets out the Government’s policies for renewable energy that are seen as vital to facilitating the delivery of the Government’s commitments on both climate change and renewable energy. It encompasses four identified elements, which are housing, the protection the environment through the curbing of greenhouse gases, a prudent use of natural resources; and the maintenance of high and stable levels of economic growth and development.


- A sub-national policy document that outlines proposals to bridge the £30 billion output gap per annum identified between the North and the rest of England by 2020. The report details bringing more people to work; helping those on incapacity benefits to secure employment; strengthening innovation, and entrepreneurship; meeting the skill needs of employers through education investments; offering greater financial support to struggling manufacturing companies; strengthening the commercial and public transport infrastructure; and promoting the North more vigorously.

Regional, Sub-Regional and Local Policy

3.27 Notwithstanding the review of sub-national policy, important guidance is still contained within a suite of regional policy guidance. This is important context, particularly in the short term as these documents will have influenced current, pipeline, and short term-future investment spending in Halton.

Regional Economic Strategy

3.28 The vision for the Northwest is of “a dynamic, sustainable international economy which competes on the basis of knowledge, advanced technology and an excellent quality of life for all where” and in this respect, the North West RES takes its lead from the higher level policy
drivers detailed above. This will have significant implications for place-making proposals through the Mersey Gateway Regeneration Strategy.

3.29 The RES identifies three major drivers to achieving the vision;

- to improve productivity and grow the market - build on the areas of success and its particular assets and opportunities to increase GVA per person employed (£10 billion of the GVA gap) through increasing the added value of jobs in the region as well as retaining the existing high added value jobs;
- to grow the size and capability of the workforce, in short to get more people working and to encourage all forms of economic activity in the most deprived areas and among our most disadvantaged communities (£3 billion of the GVA gap is due to fewer people working); and
- underpinning the two main drivers by creating and maintaining the conditions for sustainable growth and private sector investment. This means investing in the region’s environment, culture and infrastructure (especially to link growth areas with more deprived communities), improving the quality of life, tackling deprivation, valuing diversity and social inclusion, and recognising the social and environmental implications of economic growth.

*Regional Spatial Strategy 13: North West (2003)*

3.30 The Regional Spatial Strategy for the North West (RSS13), now part of the development plan, has as its main aim the promotion of sustainable patterns of spatial development, whilst advancing and supporting the region’s economic, social and environmental interests. It aims to promote sustainable development through economy in the use of land and buildings, enhancing quality of life, quality in new development, promoting economic growth, competitiveness and social inclusion. The development framework set out in RSS13 is based on the principle that urban regeneration should be central to land-use policy in the region and that conurbation’s should be the focus for regeneration and environmental improvement. Development in the region must strive to enhance the quality of life within these metropolitan towns and boroughs where there is an evident concentration of social, economic and environmental problems.

3.31 Widnes and Runcorn are identified through Policy SD2 as a key Metropolitan Settlement where wide-ranging regeneration and environmental enhancement should be secured. Significant enhancement in terms of image and opportunities for a higher quality of life overall is seen as essential to achieving the sustainable regeneration objectives of the area.
3.32 The annual required new housing provision in Halton during the plan period 1996 and 2016 is set at 330 dwellings, focusing upon the re-use of vacant and under-used land and buildings as a priority where possible. Although it is recognised that achieving new housing numbers on brownfield land is a key central government objective, in Halton’s case there is a clear deficit in the availability of suitable brownfield land.

Draft Regional Spatial Strategy North West (2005)

3.33 Draft RSS introduces revised housing requirement figures for the North West. Halton is identified as lying within the Mid-Mersey Region where there is an evident steer towards the provision of sufficient new residential development to support the potential for economic growth and local regeneration strategies. This will include a wider range of general and high-quality market housing, whilst at the same time meeting local needs and requirements for affordable housing provision.

3.34 The revised annual housing figures for the Halton Borough reflect this, with an increase from 330 to 500 new dwellings per annum during the plan period 2003 – 2021, an overall total of 9,000. An indicative target of 80% has been derived for new dwellings to be developed on brownfield land.

3.35 Under Policy R78 (Regional Priorities for Transport Investment and Management), the Mersey Gateway is included as a Transport Investment Priority as a scheme within the Regional Funding Allocation Programme.

Regional Spatial Strategy North West Inspectors Report

3.36 The Inspectors Report concluded with some ‘clear concerns’ with the outcome of the draft submission document. These included, amongst other things, the accepted end date of the Strategy, the identification of Key Service Centres, failure to deal with gypsies and travellers, and gaps in respect of waste and energy. Further weaknesses included the failure to take into account or take forward the application of Strategic Housing Market Assessment, Appropriate Assessments, and the draft PPS advice on Climate Change, which was published during the EIP.

3.37 The Panel’s advice was that the draft RSS ‘is not satisfactory as it stands’ but should proceed to publication with the proviso that an early and quite wide-ranging review of the Strategy is undertaken.

3.38 The Panel accepted the housing target in the draft RSS for Halton but accepted Halton Council’s claim that the proposed 80% target for residential development on Previously Used
Land would be too challenging. Accordingly, the RPG13 target (65%) for re-use of land was accepted.

**Regional Housing Strategy**

3.39 The Strategy (published in 2005) adopted a vision of "a region working together to deliver a housing offer that will promote and sustain maximum economic growth within the region ensuring all residents can access a choice of good quality housing in successful, secure and sustainable communities".

3.40 An Action Plan for the 2006-08 has subsequently been prepared which identifies specific priorities and workstreams that will bring life to the Strategy document. Much of the initial work programme will concentrate on developing a research programme and building up the evidence base to allow for baseline data and regional targets to be established in order that progress can be monitored and the impact of the current Strategy.

**Liverpool City Region Development Programme**

3.41 A vision is established for the City Region which is centred on regaining its "status as a Premier European city region by 2025" by securing an "internationally competitive economy and cultural offer; and outstanding quality of life; and vibrant communities contributing to and sharing in sustainable wealth creation".

3.42 A number of important objectives and investment priorities are established:

- developing the Liverpool City Region as the culture capital of the North of England.
- developing the Port of Liverpool as the international Sea Gateway to the North of England.
- develop Liverpool John Lennon Airport as an international airport serving global destinations;
- the Mersey Gateway – A new road bridge crossing of the River Mersey to improve and modernise road access to the City Region.
- Improving rail connectivity across the Northern Way – NETA – and connections to international markets;
- promotion of the sub-region as a major centre for Research and Development, in which the three Universities, Health related research, Daresbury SIC, Liverpool Science Park and the National Bio-Manufacturing centre are key assets;
• enabling serious, self sustaining clustering in priority industries;

• Pervasive Productivity – to secure a step change in raising the productivity of our wider business base to close the GVA performance gap;

• Public Sector Excellence – Maximise the productivity of the public sector.

• 21st Century Sites and Premises – delivering a diverse range of modern and flexible sites, capable of meeting the needs of modern business.

• develop the region’s unique potential for excellence in environmental technology / performance, expand the knowledge base, and achieve inter-regional excellence in selected sub-sectors.

• to achieve the national full employment rate of 75-80% with a threshold rate of 60% in every community by 2015.

• support skills development and to identify opportunities for new approaches to skills development that will accelerate the rate of skills acquisition across the city-region to create a city region renowned for a highly skilled and flexible workforce.

• expand the quality and choice of Liverpool’s housing offer; enhance the liveability and amenities of residential areas to support and reflect economic growth; rebuilding and revitalising the conurbation core and the pockets of market failure; tackling and eliminating multiple deprivation, celebrating diversity and improving access to opportunity for all; making a step change in health and community safety;

• establish the Liverpool City Region, internationally and nationally, as a place where health, and personal well being matches the image of a thriving economy and growing European City.

Halton Community Strategy

3.43 The vision for Halton will be a “thriving and vibrant borough where people can learn and develop their skills, enjoy a good quality of life with good health; a high quality, modern urban environment; the opportunity for all to fulfil their potential; greater wealth and equality; sustained by a thriving business community; and within safer, stronger and more attractive neighbourhoods”.

3.44 Key themes have been identified which help structure how best to deliver the Community Strategy. These are: A Healthy Halton; Halton’s Urban Renewal; Halton’s Children and Young People; Employment, Learning and Skills in Halton; and A Safer Halton.
3.45 Delivery targets set against a comprehensive baseline have been set for each of these themes, to be delivered by the Local Strategic Partnership.

_Halton Corporate Plan_

3.46 The plan outlines the goals that the Council and the Borough want to achieve to help build a better future for Halton. It concentrates on the fresh challenges, priorities and achievements planned over the next five years to help improve the quality of life for people in Halton. Our vision remains constant. It is that: "Halton will be a thriving and vibrant Borough where people can learn and develop their skills; enjoy a good quality of life with good health; a high quality, modern urban environment; the opportunity for all to fulfil their potential; greater wealth and equality, sustained by a thriving business community; and safer, stronger and more attractive neighbourhoods."

_Halton Unitary Development Plan (2005) and Local Development Framework_

3.47 The Halton Unitary Development Plan (UDP) was formally adopted on 7th April 2005. The adopted UDP sets out the framework for the development of land in the Borough from the present up to 2016.

3.48 The Plan outlines that future housing developments will be phased up until 2016, with uncommitted greenfield sites coming forward as development opportunities only once allocated brownfield and committed greenfield sites are developed out in preceding phases. The phased release of housing land is promoted by the draft Regional Spatial Strategy to ensure a managed approach to new residential development.

3.49 The Plan provides the primary policy support for the Mersey Gateway (MG) at policy S14, which states:

"A scheme for a new crossing of the River Mersey, east of the existing Silver Jubilee Bridge, will be promoted to relieve congestion on the existing bridge as part of an integrated transport system for Halton and the wider regional network."

3.50 The policy cross-refers to the Council’s Local Transport Plan (LTP) which identifies the new Mersey crossing as a key priority to tackling congestion and which shows a more broad indication of routing.

3.51 In addition, there is a wholly separate policy strand which seeks to deliver regeneration benefits within Halton.
3.52 Strategic policy (S1) provides the basis for taking the Regeneration Strategy forward as SPD.

"Action Area plans will be prepared for the following areas as Supplementary Planning Documents: Southern Widnes; Central Widnes; Widnes Waterfront; Runcorn and Weston Docklands; Hale Bank; and Castlefields / Norton Priory"

3.53 The Action Areas are as illustrated above. This is taken from Map 3 from the adopted UDP.

3.54 Southern Widnes, and the boundaries of Southern Widnes, is clearly identified as Action Area 1, to which Policy RG1 refers. This states that:

"The Southern Widnes Action Area is proposed an area of mixed uses, including housing. The following uses will be acceptable: Business Use (B1); General Industry (B2), provided there is no detrimental affect on residential amenity; Residential institutions (C2); Dwelling houses (C3); Community facilities (D1); Shops (A1), that serve the local community provided that UDP retail policies are complied with; Food and drink outlets (A3), serving the local community; Recreation and leisure facilities serving the local community (D2); and Open space and public spaces".

3.55 The MG northern landfall is within this Southern Widnes Action Area and it is this SPD policy which the MG consultants' brief suggests is the primary vehicle by which the regeneration benefits of the bridge will be captured. No corresponding designation is made in respect of the southern landfall, nor in relation to the Silver Jubilee Bridge proposals.

3.56 Under the terms of the Planning and Compensation Act 2004, the UDP is to be replaced by a Local Development Framework and associated Development Plan Documents. The process is underway but in the meantime the policies within the adopted plan are 'saved' for a period of 3 years, in this case from the date of adoption in April 2005. A request is currently being prepared to the SoS to secure UDP policies beyond 2008.

3.57 In terms of the Mersey Gateway proposals the intention is for an application to be submitted under the Town and Country Planning Acts for the bridge and its associated infrastructure. The current timeline anticipates that this will be submitted early 2008; it will draw its primary
justification from Policy S14 within the saved UDP, demonstrating an overall compliance with the spirit of the policy.

3.58 The emerging Core Strategy establishes an expectation that the principle of Policy S14 will carry through to the eventual Core Strategy, which is due for adoption in January 2009. An indicative plan of MG is identified in the Options paper but this has not yet been fixed. The Options Paper also recognises that the new crossing will affect existing and future use. The next stage of the LDF Core Strategy is underway and this will include the Mersey Gateway scheme in its Halton Urban Renewal Strategy entirety.

**Halton Economic & Tourism Development Strategy 2005-2008**

3.59 A Strategy for the Borough has been developed for 2005-08 that outlines the economic goals of Halton and is informed by the wider policy context through the Regional Economic Strategy and Halton's Community Strategy. Hinging upon four key aims, it seeks to improve enterprise and performance, increase levels of employment and skills, improve infrastructure and facilitate a healthy supply of high quality business premises and advance the image of Halton and the quality of its environment. The aforementioned vision is sustained, focusing upon "the development of a thriving and sustainable economy".

3.60 Hence, it concentrates upon policies to diversify the local business base, develop the workforce skills and capacity to secure employment for the unemployed, target investment towards the business sectors offering the strongest growth potential and focus property development to counterbalance identifiable industrial and commercial stock shortfalls. Furthermore, a key policy action to facilitate such development is presented within the Economic Development Strategy as the securing and delivery of the major new Mersey Gateway Bridge crossing.

3.61 Delivery of the Strategy, and progress against targets, will be overseen and monitored by the Halton Local Strategic Partnership (LSP) utilising its Specialist Strategic Partnerships, and through the Council's Executive and Policy, and Performance, Boards.

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Halton Borough Council consulted on the Core Strategy Issues and Options Paper between July and September 2008
4. ECONOMIC AND COMMERCIAL

4.1 The performance of the economy represents the critical driver in shaping an area, directing and determining its future sustainability. This section examines the performance of the local economy, including a review of the commercial markets.

The Economy

4.2 The following discusses the issues related to the economic context and potential labour market impacts associated with the Mersey Gateway development proposals.

Economic Context

4.3 Across Merseyside the situation is positive, particularly with the Capital of Culture next year. The area appears to be keeping pace with the rest of the UK economy and posted GVA growth of 5.6% in 2004 – only slightly behind the regional average (5.7%). The city region attracted some 18 inward investment projects in 2005/06 resulting in nearly 1100 jobs – which exceeded Manchester and Lancashire by some margin.

4.4 Although, its employment rate still lags well behind the regional and national averages at 68.2%, critically, Merseyside is still experiencing increasing employment, demonstrating clear signs of recovery associated with a growth in population, which is a vital barometer of economic regeneration.

4.5 Liverpool itself is the major driving force in this recovery posting strong growth in employment and GVA.

4.6 Conversely, GVA per head remains at 73% of the UK average in Merseyside and thus, poses a significant challenge for the wider city-region going forward with the diminution of the EU programme as the latter expands to incorporate ‘weaker’ Eastern European countries.

4.7 At a local spatial scale the ‘epicentre’ of the potential socio-economic impacts from the Mersey Gateway Bridge proposals is the key district of Halton. The second crossing will run through the heart of this district and its impact will, therefore, be of particular relevance to the indigenous population.

4.8 In turn, businesses currently located in the district, and development and re-development sites proposed within the Mersey Gateway regeneration strategy, will be a particular source of
demand / supply interface in the area. Therefore, it is vital to consider the current, and future, expected local economic trends and, subsequently, to investigate the labour context in terms of the district’s ability to meet potential demand flowing from wider developments associated with the Mersey Gateway. This will be the focus of the following sections.

Historical Analysis

4.9 Scrutiny of trends in the Merseyside area since the recession of the 1980s provides a reflective context for the Mersey Gateway regeneration strategy proposals. Employment and GVA trends for the sub-region are presented respectively in the following graphs.

Figure 4.1: Indexed Sub-regional Historical Employment Trends (1981-2006)

![Graph showing employment trends](image)

Source: CE / GVA Grimley
4.10 Analysis of the data presented above suggests that the Halton area of Merseyside has been growing at a strong pace from a 1981 base, with both employment and GVA growth far outstripping the sub-regional and city averages, over the period.

4.11 Such a trend is likely to have stemmed from the spread of business and professional services and other higher value producer services employment negating manufacturing losses since the early 1980s and 1990s. In addition, Halton's physical 'sandwiching' amongst three very vibrant areas in Warrington, West Cheshire and Liverpool itself has provided what appears to be key ingredient for the long term performance to date.

4.12 It is noteworthy that Halton did not experience the deep-rooted downturn in the recession of the early 1980s, unlike some of its respective counterparts in Merseyside.

Contemporary Analysis

4.13 This section will provide a contemporary perspective on the economic development pattern within Halton and the wider Merseyside sub-region, before analysing forecast data developed by Cambridge Econometrics (CE) (2006).
4.14 Halton is currently host to approximately 3,400 business units\(^{11}\) (2,415 VAT registered companies) and total employment is around 63,000\(^{12}\). Data on businesses are notoriously difficult to interpret; VAT registration or stock for example excludes a great number of smaller businesses and changes in the VAT stock does not necessarily sit alongside a loss in the business base. It may indicate downsizing.

4.15 However, the current VAT stock is somewhat less than expected in the Halton economy taking account of the relative regional population densities (i.e. the per capita ratio is some 25% below expectation\(^{13}\)). Roughly speaking Halton has a potential deficit of over 800 VAT registered businesses as at 2006.

4.16 However, where we undertake the same analysis using the PAYE data (i.e. ABI Data Units) then the picture is reversed. Halton has in excess of 60 business units above expected levels. It would therefore appear that Halton is performing slightly above expectations in terms of density of the business base although the value of those businesses leads to a deficit in the VAT base, which feeds into overall value added. In turn this would suggest that Halton would significantly benefit from attracting higher value businesses to the area as well as supporting stronger growth from its indigenous base including, for example, providing appropriate facilities to for businesses to expand and develop (i.e. sites and properties).

4.17 Employment is distributed across sectors as shown in the following graph (Fig. 4.3).

4.18 The data indicates significant differences in the current employment structure for Halton, when contrasted against Merseyside as a whole, and this arguably contributes towards the difference in economic performance since the last major recession to date. The following points are of particular note:

- There exists a generally very high level of employment dedicated to the traded sector within Halton. The proportion of employment in public services is some 45% below the average for Merseyside, at 18% of total employment.
- The relatively high concentration of manufacturing employment in Halton, reaching almost 15%, is over 50% higher than for Merseyside (9.9%).
- There exists a significantly higher concentration of employment in Transport & Communications as well as Finance & Business Services in the Halton Borough.

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\(^{11}\) PAYE business units as measured through the ABI database.
\(^{12}\) LEFM data from Cambridge Econometrics which includes self employment and is not adjusted for FTE.
\(^{13}\) Expected ratio is 0.017 whereas actual ratio is 0.013.
Figure 4.3: Sectoral Distribution of Employment: Halton and Merseyside (2006)

Source: Cambridge Econometrics (2006)

4.19 Hence, the high density of traded activity in Halton contributes significantly towards the above average performance in GVA and employment terms over the last two decades. This is not to say that Halton has no problems, these are discussed further below, yet within a Merseyside context, which itself has been challenged, Halton has performed well and its strong private sector structure is a considerable factor in this regard.

Economic Projections

4.20 This section will proceed beyond the analysis above to present a forecast of future economic trends within Halton. As previously mentioned this data stems from research produced recently by Cambridge Econometrics.

4.21 CE's analysis indicates that Halton, in addition to the wider Merseyside sub-region, is expected to post reasonably strong GVA and employment growth in the near and longer term (up to 2020). The results of which are presented in the following graphs.
Figure 4.4: Indexed Sub-regional GVA Forecast (2000-2020)

Source: CE / GVA Grimley

Figure 4.5: Indexed Sub-regional Employment Trends Forecast (2000 - 2020)

Source: CE / GVA Grimley
4.22 Analysis of the data indicates that prospects in Halton are no better than those for the sub-region, or Liverpool city, over the next 10 -15 years. For the majority of said period Halton is, in fact, expected to lag behind in both GVA and employment terms.

4.23 Therefore, whilst past performance for Halton has been strong, in relation to the sub-region, forecasting indicates that its performance will be much more in line (if not below) the average. This is counterintuitive, to a degree, given the current structure, and indeed past performance. This appears to indicate a level of maturity in the market, and possible competition, which may be tempering the future rate of growth in Halton. Specifically, these may well be supply side issues – such as the degree to which new floorspace has come on-stream which economic projects, such as the Mersey Gateway strategy, seek to address.

**Sectoral Forecast**

4.24 Sectoral forecast analysis, over the period 2006-2020, conversely indicates a very close link to the sub-regional forecast save for the forecast increase in Financial and Business Services employment where Halton expects to perform considerably better than the average for Merseyside. Analysis of the employment sector and related GVA forecasts are replicated graphically below and show a similar pattern between the various major sectors.

**Figure 4.6: Forecast Employment Change (%) for Major Sectors (2006-2020)**

![Forecast Employment: Major Sectors 2006 - 2020](image)

*Source: CE / GVA Grimley*

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14 Halton has very little in the way of Agricultural and Utility employment and are therefore of no relevance with regards to sub-regional comparison.
4.25 Deeper analysis is presented graphically below for the prolific growth in the Finance, Professional and Business Services. The data offered provides a more detailed sub-sector analysis for these key sectors.
The forecasts demonstrate that projected increases in employment are associated specifically within the non-finance related activity – especially within the computing services sector. This perhaps sets a particular context for the Mersey Gateway development and the industries and skills that may well ensue locally. Other growth sectors of note include:

- Health
- Miscellaneous Services
- Distribution
- Communications (including Telecommunications)

Notable only in its absence is the lack of manufacturing sectors present, which coincides with more recent national trends in the sector. That is, whilst clearly there are some very prominent manufacturing operators located in Halton, and the surrounding area, (Vauxhall, Zeneca, Jaguar), these industries are still having to fight to maintain overall share of employment within the wider Merseyside context and indeed at a national spatial scale.
Responding to Economic Growth

4.28 Having analysed the general market trends in Halton the following considers some of the labour market issues that are pertinent to the Mersey Gateway project. In particular, where noted above that forecast growth in Halton is somewhat unusually tempered, this may well be associated by supply side issues in the area, which the Mersey Gateway project seeks, in part, to address. A range of factors may be relevant including those that are:

- logistical;
- site and premises related;
- skills and labour related; and
- structural / infrastructural capacity related.

4.29 The following section considers the labour market factors which could be relevant in this regard.

Local Labour Market

4.30 The key impact area for the Mersey Gateway is the Borough of Halton. Whilst there is a wider Travel to Work Area (TTWA) associated with this sub-area this investigation requires the knowledge regarding how this more-concentrated area is likely to, and has the capacity to, respond to the Mersey Gateway development in labour market terms.15

4.31 The spatial map below is of particular interest in this regard, describing those wards which have the greatest potential capacity and need to respond to the development opportunity. These are wards with the highest rates of rented households and rates of economic inactivity. Such indicators are highly correlated in these wards, therefore representing a major focus of regenerative influence for the development within the darkest shaded areas.

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15 The analysis of the local labour market is not constrained by the immediate boundary definition of the Mersey Gateway regeneration strategy boundary.
Figure 4.9 Concentration of Social Housing & Economic Inactivity in Halton
4.32 Whilst identification of particular priority wards for targeted support and development will be focused upon in subsequent sections of this report, the following considers the labour market issues on a broader basis which, in turn, tempers the requirement for a highly concentrated approach to the Mersey Gateway development at this stage of the report.

4.33 Instead, a more flexible approach is appropriate, consistent with an area which has limited scope and capacity to expand. Thus, this section will proceed by assessing the labour market conditions at a Borough wide spatial scale.

4.34 Utilising 2001 Census data, extracted from ONS, the following graph indicates that trends in the level of persons of working-age (16–74) is currently decreasing in the Borough (2004-2006), mirroring the trend apparent at the wider Merseyside city-regional spatial scale, albeit at a more severe level.

**Figure 4.10: Working Age Population within Halton and Merseyside (2004-2006)**

![Working Age Population: Merseyside and Halton](image)

Source: ONS

4.35 The data appears to support the observation that, in labour market terms, local supply-side conditions have been tightening in Halton.

4.36 Comparatively, analysis of economic inactivity levels within Halton and the wider Merseyside area, shown in the following graph, correspond with supply-side constraint.
The data suggests that economic inactivity levels appear to be decreasing slightly in Halton, although such a trend is less apparent at the Merseyside level. This would indicate that the scope for significant expansion in the locally available labour market, exclusive of inward commuting labour, may well be quite limited at present.

Further evidence of the labour market supply base can be ascertained by assessing resident qualification and skill levels within Halton. The following graph highlights the level of qualification attainment, to NVQ4+ level, of working age residents within the Borough compared to the wider Merseyside sub-region.
Figure 4.12: Qualification Attainment of Working Age Residents within Halton and Merseyside (2006)

Source: ONS

4.39 The data indicates that, in educational terms, the labour supply base of Halton is broadly correspondent with the sub-regional average. However, detailed inspection reveals that there are proportionately fewer highly qualified residents, at the NVQ3 and above level, in Halton than the wider sub-regional average.

4.40 In terms of how this may reflect on the occupational distribution of employment, this is exhibited below.
Figure 4.13: Occupational Distribution of Employment - Halton and Merseyside (2006)

Source: ONS

4.41 The results outlined above clearly reflect the differing industrial structure of Halton and the wider Merseyside sub-region.

4.42 The latter, with a much stronger public sector representation in the economy, is evident due to the higher propensity towards professional and administrative occupations. Conversely, Halton, exhibiting a higher concentration of Manufacturing, Finance and Business Services, demonstrates a much higher propensity towards sales / customer services and more elementary occupations.

4.43 Such observations are of importance in predicting latent labour supply available in these areas. To this effect, analysis is subsequently undertaken to estimate the potential scale of latent labour supply in Halton. The results of which, are summarised in the following table.

Figure 4.14: Occupational Distribution of Employment within Halton and Merseyside (2006)

<table>
<thead>
<tr>
<th>Description</th>
<th>Number</th>
</tr>
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<tbody>
<tr>
<td>A. Working Age</td>
<td>49,400</td>
</tr>
<tr>
<td>B. Working Age - Inactive</td>
<td>13,500</td>
</tr>
<tr>
<td>C. of which, those wanting a job</td>
<td>2,600</td>
</tr>
<tr>
<td>D. Unemployed</td>
<td>1,700</td>
</tr>
<tr>
<td>E. of which, structural (long-term unemployed)</td>
<td>1,228</td>
</tr>
<tr>
<td>G. Unemployed available (D-E)</td>
<td>472</td>
</tr>
<tr>
<td>= Potential Indigenous Labour Market Capacity (C+G)</td>
<td>3,072</td>
</tr>
</tbody>
</table>

Source: GVA Grimley
4.44 The results indicate that the current latent labour supply in Halton is slightly over 3000 people. It highlights that Halton has very limited supply of labour, with fewer than 500 people effectively, and immediately, available for work, in the near term (see 'G' in Figure 4.14). This is not to say that this constitutes 'available' labour; this would be the maximum available labour where the supply of employment was appropriate.

4.45 National policy is now also dedicated towards targeting the inactive population and in particular the large numbers currently drawing incapacity benefits. To the extent that this shift in emphasis is going to be successful is does suggest that there is scope to increase on these estimates as well. A working assumption suggests that up to 60% of people currently on incapacity benefits could be potentially available to pick up employment – this could add another 1,700 people to these estimates. In total therefore there could be up to 4,700 people potentially available for work in this area over the medium term.

4.46 However, the transition from (long term) economic inactivity is not an easy one – indeed if it was then it wouldn’t be a problem in the first place. These are people who are materialised disenfranchised from the labour market and there have been countless and indeed concerted attempts at lowering the number of inactive people over the last 25 years following the UK’s deindustrialisation during the early 80s. It has been a slow and difficult process.

4.47 In turn it is vital to be realistic about both the scale and timing of converting the economically inactive population in this area to fully functioning economic agents in the 21st century. To ensure that Halton maximises the opportunities for local people to benefit from the Mersey Gateway project, then it will require substantial and concerted investment to ‘ease’ this transition for these largely disaffected groups of people.

4.48 This is not a quick fix scenario. It therefore follows that this analysis highlights a fairly small number within the existing labour market (circa 500) that is immediately available for work. Where large scale, or shock, increases in demand were to materialise it is most likely that this area would experience price (higher wages) and volume effects (skill shortages). The importance of the latent supply of labour in Halton is clear for, in such circumstances, these individuals are most likely to provide the backfilling role. That is local shocks in labour demand will be met from the existing active workforce, the latent supply of labour is important in terms of mitigating these displacement effects.

4.49 It is important to note, at this point, that calculations above do not take account of the commuting potential in the Borough. In particular, the new Mersey Gateway will undoubtedly enhance labour supply availability from wider a field.
4.50 Accounting for current understanding of the qualification patterns in Halton, in absolute terms, the following graph indicates the labour expectation in the Borough.¹⁶

**Figure 4.15: 'Expected' Qualification Levels: Latent Workforce in Halton (absolutes)**

![Graph showing expected qualification levels](image)

*Source: ONS / GVA Grimley*

4.51 Ultimately, it is likely that the distribution of qualification amongst this group would be biased towards NVQ 2 and below; less qualified including no qualifications.

4.52 Similar analysis of the occupational forecast is provided graphically below. In general terms, where assumed that the occupational distribution of the latent labour supply mirrored current employment this would indicate an even mix of occupations.

¹⁶ Analysis is based on 3000 and therefore excludes the ICB estimates.
Intuitively expectations would be for there to be less people in the latent labour supply with higher level occupational experience or background (although where distinguishable between male and female then this arguably is less apparent). In which case where a notional adjustment is made to the distribution, away from the higher level occupations towards the lower, then a more realistic profile is perhaps evident.

In effect, a more realistic assessment of the labour conditions would indicate that a third (1000) of the latent labour supply would be associated with higher level occupations (Administrative / Secretarial and upwards), and just over 2000 across the other more elementary occupations\(^\text{17}\).

Further where estimates are adjusted to account for occupational distribution of the unemployed and inactive (separately) in Halton, according to the 2001 Census, results indicate the position to be worse with over 25\% (825) available within the higher occupations. The majority of the latent supply is thus associated with elementary occupations.

\(^{17}\) A working assumption would suggest that the estimated 1700 additional people on incapacity benefits would also fit within this group of skills.
4.56 The following section will proceed to assess socio-economic trends, including employment status, levels of income and wages, within the Borough.

Income and Wages

4.57 This section will firstly analyse income levels within the boundary of the Mersey Gateway regeneration strategy. The spatial plan below indicates the distribution of income within Halton, when contrasted against the national average in order to assess the relative economic wealth and strength of the area.
Figure 4.17 Average Median Income within Halton
4.58 The plan indicates substantial areas of low income within the boundaries of the Mersey Gateway regeneration area. Concentration is particularly acute within the West Bank area of Widnes and areas of Runcorn Old Town, yet the majority of the Borough is shown to have an income substantially below the national average.

4.59 The following section will analyse the relative levels of wages, for full time and part time employees at a household level, and workplace level for Halton, with comparisons drawn to the wider North West region.

4.60 The graph below illustrates the total number of persons, of working age, employed within Halton and the division between full time and part time employment.

Figure 4.18: Full Time & Part Time Employment Levels in Halton (April - March 2007)


4.61 The data indicates that, of the 52,900 persons employed in the Borough between April 2006 and March 2007, 81% were in full time work, whilst a minority of 19% were in part time employment.

4.62 The following graph summarises gross annual household pay for total workers, and full time employees, residing within Halton, and the comparative levels for the North West.
Figure 4.19: Annual Gross Resident-based Pay in Halton compared to North West Region

Source: Nomisweb, 2007

4.63 The graph indicates that full time employees residing in Halton receive lower gross annual pay than the regional average. This is mirrored for the resident total, which indicates that those working part-time, whilst living in Halton, are also paid less than the regional average for the North West.

4.64 The following graph summarises the annual gross workplace-based pay in Halton, contrasted alongside the wider North West region.

Figure 4.20: Annual Gross Workplace-based Pay in Halton and North West Region

Source: Nomisweb, 2007
The data indicates that workplace based pay in Halton is significantly in excess of the North West regional average, for full time and total, or the remaining part time, employees. This contrast with the aforementioned resident-based household income suggests that there is an in-migration of persons, residing outside Halton, into the Borough for employment.

**Key Economic Messages:**

- The Halton economy has been performing well relative to the sub-region and the forecast indicates that this performance is likely to continue.

- Nevertheless, evidence suggests supply side constraints could be tempering Halton’s future growth trajectory. This could be related to the supply of labour, for fewer than 500 people area are effectively, and immediately, available for work in the area.

- Estimates indicate 3,000 – 4,700 persons as the latent supply of labour (including the unemployed). However, with forecast employment expected to increase by 6,000 by 2020, this brings into question the extent to which such demand can be met locally, where there is significant new supply of floorspace coming on-stream in the next few years (see next section).

- This trend implies that substantial net commuting is required to meet demand for labour, alongside a growth in population. If economic aspirations are to be realised, whilst noting that forecast increases are unlikely to include the Mersey Gateway effect that is likely to produce an incremental impact on employment levels beyond those forecast, then the Mersey Gateway proposals are extremely important for this area’s future development. For, there is evidence of a mismatch between local accessibility of future employment opportunities and the local supply base of labour. This will ensue with any incremental forecast for the Mersey Gateway’s impact in the absence of active and concerted discriminatory labour market support in the Halton area.

- Further, proposals will need to take into account the potential mismatch between the latent supply of skills / occupations and the forecast job opportunities. To ensure that the local communities benefit fully from the Mersey Gateway there would appear to be a need to provide skills and training facilities in place to better job to supply conditions locally.
5. COMMERCIAL MARKETS

Supply of Land and Property

5.1 The following summaries present the percentage floorspace quantum, of industrial, retail and office development, in Halton compared to relative floorspace allocation at a regional and national spatial scale:

Figure 5.1: Floorspace Usage Quantum in Halton

<table>
<thead>
<tr>
<th></th>
<th>Floorspace Quantum</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Halton (m²) (000's)</td>
</tr>
<tr>
<td>Retail Premises</td>
<td>198</td>
</tr>
<tr>
<td>Offices</td>
<td>256</td>
</tr>
<tr>
<td>Industrial</td>
<td>1,667</td>
</tr>
</tbody>
</table>

Source: ONS.

Figure 5.2: Floorspace Usage Quantum in Halton compared to Regional and National Scales:

Source: ONS.
5.2 The majority of floorspace in Halton is clearly dominated by industrial premises, representing 77.1% of total floorspace usage, which is significantly above the regional average (56.9%) and national level (62.1%).

5.3 Conversely, office and retail floorspace, representing 11.8% and 9.2% of Halton’s total floorspace respectively, is significantly below regional (13.1% and 16.9%) and national (17% and 17.5%) respective levels.

5.4 Analysis of Halton Borough Council’s AMR for 2005-2006 indicates the development of 12,270 m² of B1(a) business offices, 4,506 m² of B1(b), 0 m² of B1(c) light industry, 17,225 m² of B2 general industry and 9,222 m² of B8 storage or distribution over this period.

5.5 This level of development indicates a substantial increase from the previous year (2004-2005), summarised in the relevant AMR, in all uses except B1(b) offices (35 m²). The statistics for 2004-2005 indicate much lower rates of completion, including 3,018 m² of B1(a) business offices, 2,570 m² of B1(c) light industry, 3,244 m² of B2 general industry and 2,865 m² of B8 storage or distribution.

5.6 In addition the Report highlights that, from 2006 to 2007, there was development of 11,110 m² of B1(a), 40 m² of B1(b), 0 m² of B1(c), 21,497 m² of B2 and 7,438 m² of B8 uses within the Borough. This indicates a fall in B1(a) and B1(b) business office space development (1,180 m² and -4,464 m²) and B8 storage/distribution (-1,784 m²) between 2005/06 and 2005/07. Conversely, an increase in class B2 general industrial development is apparent; rising by 4,272 m², or 19.9%, over the same period.

5.7 A summary of the development trend for the period 2004-2007 is demonstrated in the following graph.
Figure 5.3: Historic Floorspace Development in Halton by Use Class (2004/05-2006/07)

Floorspace Development in Halton by Use Class:
2004/05-2006/07


5.8 Analysis suggests that development has definitely expanded rapidly within the B1(a), B2 and B8 use classes, across the Borough, since 2005.

Age of Commercial Property

5.9 This section will analyse the age of the current stock, in order shed light on the likely quality and appropriateness for contemporary purpose.

5.10 The following table summarises the date, and volume, of completions for stock in Halton, compared to the wider regional and national trends.

Figure 5.4: Age of Commercial Property in Halton, the North West and England & Wales

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<tr>
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<td>127</td>
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<td>174</td>
<td>86</td>
<td>111</td>
<td>31</td>
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December 2007
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<td>7.5%</td>
<td>8.4%</td>
<td>6.4%</td>
<td>1.7%</td>
<td></td>
</tr>
</tbody>
</table>

Source: DCLG

5.11 The data indicates that the majority of the Borough's commercial stock (32.3%) dates back prior to 1940, which reflects regional and national trends. Similarly, completions in Halton decline post 1940, mirroring wider trends.

5.12 This suggests that a large proportion of commercial property within the Borough is becoming rather aged and, as such, questions whether such stock is fit-to-purpose, and hence attractive, for modern requirements of tenants.

5.13 The following section will assess the volume of land available for future development.

Supply of Employment Land

5.14 The 2005-2006 AMR designates approximately 165ha of type B1, B2 & B8 (mixed) development as available employment land. Nevertheless, constraint is indicated with regards to available development land for industrial uses, with the majority of employment land allocated for B1(a) office use (48ha) and B8 storage or distribution (28ha).
5.16 This information is updated within the Halton Borough Council draft Employment Baseline Report 2007\(^{18}\), which confirms the completion of 13 sites, equating to 23.1 ha of employment land, from May 2006 to May 2007. Furthermore, as of 2007, there is 230.94 ha of employment land available of which:

- 125.52 ha are greenfield sites; and
- 105.42 ha are brownfield sites.

5.16 The most recent available published data is presented in Halton Borough Council’s Commercial Property Review (2007). This document suggests that overall, Halton has relatively sufficient quantities of employment land for up to 2016, yet analysis of the actual uses demonstrates the challenges that the area faces.

5.17 The majority of employment land appears to be dedicated for regional investment sites, with specialist use likely to be the outcome. Of the total available employment land in the Borough, only 90ha is dedicated to local business needs with the remainder utilised for strategic investment / specialist sites. Local businesses have been handed only ‘fill in plots’, whilst end-users are purchasing the remaining land at Manor Park. This will be considered in the following section.

5.18 Through the combination of land-supply analysis with take-up data, the report estimates a net forward land supply of only 19.79 ha as available for local companies, which is approximately two years supply.

Constraints on Land

5.19 Halton’s Commercial Property Review (2007) indicates that the majority of key employment land sites have good access, due to the strategic transport links of the M56 and M62 situated in the South and North of the Borough.

5.20 However, it appears that contamination, resulting from the Borough’s industrial past, is acting as a constraint on development in the area. This is a significant issue, particularly due to the aforementioned shortage of space for SME’s, which are predominantly local businesses, within the Borough and the minimum brownfield development requirements (60%) outlined in RPG 13 and the Draft Regional Spatial Strategy (2006).

5.21 The most detailed information source on contaminated land constraints stems from the Halton UDP Public Enquiry Topic Paper (December 2002). The Borough became a national

\(^{18}\) Halton Borough Council, 2007
production centre for bulk chlorine, alkalis, copper smelting, soap manufacture, phosphate fertilisers and other chemicals in the late 19th and 20th Centuries. The most dangerous material, calcium sulphide waste (nicknamed galtiqu), was dumped on over 200 ha of agricultural and floodplain land in the Borough, rendering such areas devoid of any biological life sustenance.

5.22 As of 2002 Halton Borough Council had spent over £20 million on land remediation, as a result of contamination, enabling reuse of 180 ha of PDL. Of which, 129 ha was for green, and 51 ha hard, end use. In 2000 remediation was estimated to cost the Council £200,000 per hectare. In addition, the Council expected, at this time, that costs would escalate from £2 million to £6 million per annum by 2005.

5.23 The Council suggested that, according to the National Land Use Database (NLUD) (2002) that of the vacant 81.61 ha (91 sites) in the Borough, designated use classes a, b and c, 67.2 ha (41 sites) are contaminated, 15.78 ha (26 sites) are suspected of contamination and 6.62 ha have unknown contamination levels. In addition, it is known that a number of operational sites are contaminated.

5.24 An updated spatial plan of contamination in the Borough, received from Halton Borough Council (Sept 2007), is shown below.
Figure 5.5 Contamination & Sites under Contamination Investigation in Halton (2007)
5.25 The spatial plan above indicates a high prevalence of contamination within the Mersey Gateway regeneration area boundary (indicated on plan), particularly in the West Bank Impact Area of South Widnes, and the Old Town and the Rocksavage areas of Runcorn.

5.26 Under the contaminated land provisions, contained in Part II A of the Environmental Protection Act 1990, Councils are required to perform regular assessment inspections of contaminated land to inform appropriate management. The most recent update of this process in Halton is presented in the Contaminated Land Inspection Strategy Review (2008), which will take forward the Council’s strategy to 2011.

5.27 The Council suggests in the aforementioned documents, and its recently published Contaminated Land Inspection Strategy Review (2008), that the prevalence of contamination has affected the confidence of potential private sector investors who no longer see it is economically viable to reclaim a large proportion of the sites due to the imbalance between land value and remediation costs upon completed redevelopments.

5.28 Nevertheless, the Council highlights in the Strategy that remediation is a continuing and high-level priority, particularly in the Mersey Gateway regeneration area, where they aim to perform full analysis of remediation requirements and resolve any outstanding issues regarding contamination by 2009 as preparation for the new Mersey Gateway crossing.

5.29 Furthermore, the Strategy outlines a ‘Risk Prioritisation Model’ to identify and categorise land, which is likely to be contaminated and inform further investigation. Three ‘priority classes’ are presented to determine risk – high, medium and low and have categorised by use utilising Sym's (1999) ‘Index of Perceived Risk’\(^\text{19}\). The implications of contamination, and subsequent remediation requirements and costs will be presented appropriately at the Options stage of the process.

5.30 In terms of land availability, Halton Borough Council indicates that, as of May 2007, 230.94 ha of employment land is currently present for use\(^\text{20}\).

5.31 Analysis will subsequently turn to a more detailed investigation of strategic employment sites.

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\(^{20}\) Halton Borough Council draft Employment Baseline Data Report 2007
Strategic Employment Sites

5.32 The Draft RSS (2007) places specific emphasis upon several strategic sites, within the North West region, which are proximal to employment land locations within Halton. Focus is aimed towards potential for intensive economic performance gains within the Manchester city-region, as the North West’s largest sub-regional economy, and the neighbouring Central Lancashire city-region.

5.33 Furthermore, the RSS stresses the importance of the Liverpool city-region, including Halton, as a focus for increased regional economic prosperity. In particular the Strategy outlines the requirement for economic development and regeneration in the area to match accessible job opportunities with local needs by building on the opportunities provided by Liverpool city centre and its strategic international transport hubs; the Mersey Port, Liverpool John Lennon Airport and the arterial motorways.

5.34 This broadly echoes the assertions of the North West Regional Economic Strategy (2006), which identifies the Liverpool city-region as a key strategic area for high quality business locations including high value-added activity, knowledge assets and containing vital transport gateways. Halton is also recognised as a key area for the growth, and encouragement, of SME’s and business creation.

5.35 In line with regional policy, the local authority Review places considerable emphasis upon growth within several key high-quality research and knowledge-based employment areas within Halton; namely Daresbury Park and Daresbury Science and Innovation Campus located in the South of the Borough:

- **Daresbury Park, Runcorn**: This flagship business park located at Junction 11 of the M56 motorway is identifiable as a NWDA regional strategic site and was created 10 years ago, although substantial development land remains available for expansion. In total there is planning for 1.6 million sq ft. on the 90 ha site yet, as of February 2007, only 236,904 sq ft had been built upon. The site has proved highly successful attracting a number of blue chip organisations to state-of-the-art office headquarters with high rental/s and sales values.

- **Daresbury Science and Innovation Campus, Runcorn**: This high-tech employment area includes prestigious occupiers such as the Science and Technology Facilities Council (formerly the Council of the Central Laboratory of the Research Councils’ Daresbury Laboratory). Also present is Daresbury Innovation Centre, a new £50 million, 5.5 ha NWDA development targeted at securing the position of the area as a centre for
research and development excellence, supporting university spinouts and high value investment. The core technologies occupying the Centre are digital, healthcare and electronic instrumental related. Due to widespread occupier interest, at a local, regional and national level, expansion is a proposed option for what is considered a vital development within Halton and a location of significant inward investment.

Other Employment Areas

5.36 The Council also indicates the following mature industrial areas as key employment sites:

- **Waterloo Road, Widnes**: A historic, traditional area of employment located at the foot of the Silver Jubilee Bridge with a mixture of poor and average quality buildings (96) with manufacturing, logistics and storage uses dominant.

- **Catalyst Trade Park, Widnes**: An area of large low density units located off Waterloo Road, which will undergo significant demolition as a result of the Mersey Gateway strategy.

- **Halebank Industrial Estate, Widnes**: A low quality employment area of 46 units containing a number of large chemical companies situated on the Western side of Widnes.

- **Everite Road Industrial Area, Widnes**: An employment area located to the West of Widnes town centre with predominantly average building quality (99 units) and manufacturing usage dominant.

- **Spoke Approach, Widnes**: Situated off the Knowsley Expressway linking to Junction 7 of the M62, this area of employment spans 200,000 sq ft and contains 19 high-quality, detached, industrial buildings with secure yards. The dominant use type is logistics, supported by manufacturing.

- **The Health Business & Technical Park, Runcorn**: This 55 acre employment area is situated off Junction 12 of the M56 and is owned and managed by SOG Ltd. Originally built as an ICI chemical facility in 1962, The Heath now provides a range of serviced office accommodation (over 200,000 sq ft) as well as scientific and laboratory facilities (55,000 sq ft) and a high-quality conference centre. In addition, the Heath contains a ‘business village’ incorporating leisure facilities and an 18-hole private golf course. The Heath contains in excess of 170 businesses across 20 sectors, of which 75% concentrate
on high value science and technology. Major occupants include Ineos Fluor, LGC, Casella Group, Protherics and DSM.

- **Astmoor Industrial Estate, Runcorn**: As the first major employment area built in Runcorn by the New Town Development Corporation in the late 1960s, this substantial area of industrial manufacturing and office accommodation (2.3 million sq ft approx.) has reasonable access due to its positioning 3 miles from the M56, close to the Silver Jubilee Bridge bordering the South bank of the Manchester Ship Canal. The area to the North of Astmoor Road, which subjugates the site, consists of mostly larger self-contained units of which the majority are performing relatively well. Nevertheless, several vast sites, including the former Lion Foods Ltd buildings, are suffering from long-term vacancy and deterioration. The larger area to the South contains mainly large, outmoded terraced units which are unattractive in the current market and suffer from mass vacancy.

- **Manor Park, Runcorn**: This site of 153 office, warehousing, industrial and high-tech units is the largest business park location in Runcorn and is situated off the A558 Daresbury Expressway. Originally developed in the 1980’s, the site had seen subsequent updating and unit redevelopment despite the constrained nature of the area. Nevertheless, vacancy has crept into the Park due to the dating of the original development and the areas lack of physical prominence, with modern developments as young as two years old also suffering from vacancy as a result.

- **Whitehouse Industrial Estate, Runcorn**: Developed in the early 1980's by the Warrington Runcorn Development Corporation (WRDC) this employment area of 58 units is situated near to Junction 11 of the M56. Subsequently, it accommodates several major distribution companies, including B&Q operated on contract by DHL/Exel. In a similar manner to Astmoor, its terraced units are exhibiting signs of wear and age, suffering from specification issues of yard space, security and above height and as a consequence are experiencing poor occupancy rates.

- **Halton Lea, Runcorn**: This area of predominantly retail employment (11 buildings) is situated at the heart of Runcorn, but suffers a lack of prominence. A large number of 1980’s office blocks have been utilised for the public sector, by the Police, local authority and law courts. However, a large area of offices is currently experiencing long-term vacancy.

5.37 As a consequence, the only employment area in Halton now perceived as a serious market failure by the Council is the Astmoor Industrial Estate, which accommodates approximately

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4.5ha of underutilised land (although Manor Park also has increasing problems of vacancy). The site has lacked significant investment for many years and the existing owners believe that investment in the current context to be economically unfeasible. The area is viewed by the Council as a wasted, valuable asset that Halton cannot afford to utilise ineffectively.

5.38 This is a necessity for, overall, Halton is perceived as holding an oversupply of poor quality, outdated accommodation. Although it is the low quality of such accommodation (often created by the Warrington Runcorn Development Corporation during the 1970's) unmatched by the high quality demanded that makes the area particularly attractive to developers. This has been demonstrated by the number of new successful schemes seen in the area, with Abbots Park, Preston Brock and Daresbury Park to name a few. Such demand for property will undergo subsequent investigation in the following section of this report.
Demand for Property

5.39 The Commercial Property Review (2007) utilises information gleaned from surveying local businesses, agents, developers and forecast modelling\textsuperscript{22} to develop scenarios regarding the future of economic and business development in Halton.

5.40 In economic terms, the key findings indicate that;

- manufacturing is forecast to decline in size (though the Chemical industry should stay static) to be replaced predominantly by business services;
- total employment is set to grow by 2000 – 4000 jobs; and
- the number of self employed residents in Halton is predicted to decline alongside a drop in the average size of local businesses. These changes are expected to create new heightened demand for managed / incubated office space and flexible / smaller scale industrial units for business start ups.

5.41 The analysis (based on historic take up figures and the amount of land that is actually, truly available) suggests that if the Borough is to provide sufficient employment land, with range and choice through to 2016, an additional 60 is required. This added space should then be equally divided between Runcorn (30 ha) and Widnes (30 ha).

5.42 The Commercial Property Review outlines several scenarios to expand, or reinvent employment land within the Borough as follows:

- Bridging of Daresbury Park with Daresbury Science and Innovation Campus in Runcorn would create approximately 20 - 30ha.
- Redevelopment of brownfield sites that are currently underutilised, particularly Astmoor Industrial Estate, would create the other 10 ha needed in Runcorn.
- Widnes would be required to find the 30 ha of further employment land on brownfield sites alone. An attractive option to overcome this barrier would be via the re-designation of employment land currently earmarked for Strategic Developments.

5.43 Irrespective of the shift towards the service sector, demand is still generally high for industrial space over office space according to Halton's Commercial Property Review (2007). The spatial demands of both sectors are predominantly small scale with Runcorn proving popular for office location and both towns split evenly regarding demand for industrial space. Once

\textsuperscript{22} Pion Econometrics were commissioned by Halton Borough Council to produce forecast scenarios to 2016 in the report ‘Economic and Business Trends in Halton’, March 2006
located in Runcorn or Widnes, businesses tend to have high degrees of loyalty, with relocation across the Mersey infrequent.

5.44 In terms of supply, analysis illustrates a shortage of different categories of unit sizes. The industrial sector lacks high quality space that is 0 – 2000 sq ft and also 5000 – 10,000 sq ft whilst, simultaneously, there is an apparent oversupply of 2000 – 5000 sq ft and 10,000 - 20,000 sq ft space. The office sector, in particular, is seen to lack supply of high quality 0 – 1000 sq ft space.

The Future Economic Direction

5.45 A large amount of development is expected to come on-line, in both Runcorn and Widnes, over the next three to five years. The Halton Borough Council Commercial Property Review (2007) suggests that, beyond 2010, development activity in the area is hard to predict. However, if predictions of sector growth continue, there will be significant demand for higher quality office space and light industrial units.

5.46 The review forecasts the development pipeline in Widnes to include:

- 1.3 million sq ft of Industrial space covering all sizes from 3000 to 250,000 sq ft; and
- at least three separate office schemes providing space for Micro and Starter businesses

5.47 For Runcorn the forecast is as follows:

- 0.5 million sq ft of industrial space will be made available, with no developments above 7500 sq ft; and
- a variety of office and lab accommodation is proposed covering most size intervals and totalling 250,000 sq ft

5.48 The evidence suggests that it will be important to provide the conditions and land to let the private sector property market create the necessary accommodation to meet forecast demand. Consequently, recommendations are for an increasing level of office development, to kick start the underdeveloped office market in the Borough, and improved quality light industrial units utilised for uses of storage, distribution, assembly and the service sector.

5.49 Such expansion is deemed vital, particularly through the redevelopment of Astmoor, due to the predicted rise in demand for industrial space.

5.50 Other key findings for the area include:
• The highest demand for office space is usually up to 5000 sq ft whilst industrial space demand usually peaks at 10,000 sq ft.

• Freehold demand remains strong across sectors.

• Due to the expanding Science Sector in the borough, the demand for specialised space is likely to increase.

5.51 This is expanded upon in the Review, which indicates towards the likelihood of increasing strength within the sector. It suggests that, in 2003, 2.7% of Halton's employees were within the Science Sector, compared to 7.7% in North West and 7.7% in Great Britain. Yet, the Halton Science Report (September 2006), produced jointly by Halton Borough Council and The Mersey Partnership, highlights the focus on expansion in the sector envisaged in the RES and by the North West Regional Development Agency (NWDA).

5.52 The RDA announced a doubled investment in Daresbury International Science and Innovation Campus in 2005, from £25.7 million to £50.3 million due to the increased belief in its, and the wider Science Sectors, potential. The NWDA foresee significant growth and development in Halton as a response, followed by an increase in employment in the Borough's Science and research and development facilities.

Enquiries

5.53 The Council’s Commercial Property Review (2007) suggests that the Borough proves an attractive proposition for businesses to locate from 'elsewhere'. This is indicated due to 40% of enquiries coming from outside the Borough, signifying the important economic role Halton holds within the wider city-region.

5.54 The geographical origins of enquiries regarding Halton’s commercial stock are demonstrated in the following graph\(^\text{23}\).

\(^{23}\) It is important to note that from 2005/06 inward Merseyside enquiries were separated from inward North West enquiries.
Figure 5.6: Total Property Enquiries in Halton by Geographical Origin: 2001/02 – 2006/07

Source: Halton Borough Council

5.55 The data above suggests that the majority of enquiries for commercial property have originated from the wider North West region over the past five years. National and international enquiries have remained low across the same period, indicating the low prominence the Borough’s commercial property stock holds at this scale.

5.56 Comparatively, enquiry numbers from local businesses looking to start up have remained steady with those considering expansion in the area on the rise. Similarly, enquiries from the wider city region, of Merseyside, have increased since 2004/05, indicating the enhanced draw the area presents at this scale.

5.57 The following section summarises enquiry trends spatially and by size, for industrial, office, and retail uses, within Halton over the period 2001/02 – 2006/07. This indication of demand is subsequently linked to aforementioned supply issues within the Borough.
5.58 The data presented above indicates that enquiries for industrial space have been the dominant requirement for prospective tenants over the past five years, with enquiry levels remaining steady at 160-180 per annum.

5.59 In contrast, enquiries for retail property have gradually decreased from a peak in 2003/04 and, consequently, this use appears to be the least in demand. Similarly, enquiries for office property indicate a decreasing trend during the past five years from over 80 in 2001/02 to fewer than 60 enquiries in 2006/07.

5.60 Detailed formal consultation with the GVA Grimley’s leading office market analysts concluded that supply is leading demand within Halton in this sector. This, the analysts highlight, is due to a lack of stock of suitably high quality to attract occupiers at a sub-regional, or wider, scale. Instead the office market within the Borough is perceived to be sustained by local SME’s aspiring to expand or requiring start-up accommodation.

5.61 Similar conclusions were drawn for industrial units, particularly with regard to Astmoor Industrial Estate in Runcorn, which analysts indicated received little, or no, demand and had become obsolete. Buoyancy in the wider commercial market is likely to be receiving strong sustenance from Daresbury Park as a strategic, proven, benchmark location, which continues
to attract large corporations and high relative rents due to its high quality stock and excellent transport communications links.

5.62 This evidence is supported by formal consultation with property market agents conducted by the BE Group for the 'Halton Commercial Property Review' (February 2007). Responses included:

'Manor Park is only good quality stock of premises, rest is relatively poor...considering the excellent motorway connections to both towns demand should be stronger...area lags behind Warrington' (National Agent).

'There is demand for modern premises, but poor quality accommodation difficult to shift' (Regional Agent).

'Environmental improvements needed. Halton is poor relation to Warrington and neighbouring areas' (Regional Agent).

'One of the main problems in Astmoor is that the rents are too high' (Regional Agent).

'Industrial demand is for units with large yard areas, good accessibility and self-contained' (National Agent).

'Astmoor industrial estate requires wholesale redevelopment, units do not meet modern needs' (Regional Agent).

'Demand is limited, some enquiries for more modern space, so Manor Park is okay, but no interest in Astmoor Industrial Estate which requires major refurbishment' (National Agent).

'...Runcom was a poorly conceived New Town that lacks focus and has no major economic driver, relying therefore on local SME's. This does not help Astmoor that suffers from having too many similarly sized units, supply just too large for demand. The general location is okay, as Manor Park shows, but there are better opportunities elsewhere close by and Astmoor suffers from a poor environment, fragmented ownership, poor signage and a lack of facilities' (National Developer).24

5.63 Hence, such evidence highlights the necessity for intervention within the market in Halton to develop a high-quality accommodation offer – suitable to attract aspirational occupiers operating at a sub-regional, or wider, scale and thus removing the supply constraints which are, at present, inhibiting the sector from expanding to its full potential and simultaneously

24 Quoted from 'Halton Commercial Property Review' (February 2007) - BE Group (p.49-50).
negating the over-reliance upon strategic employment sites (Daresbury SIC) to maintain vacancy in the market.

5.64 The following graph summarises the enquiries for office units, by size, in the Borough.

Figure 5.8: Property Size Requirements for Office Enquiries (sq ft) in Halton

Source: Halton Borough Council

5.65 The level of enquiries for office accommodation sized 1000-5000 sq ft provides the steepest trend according to the data presented above. Enquiries dropped sharply from peak in 2001, to only 10 in 2004/05, yet have risen sharply since to the dominant enquiry size by 2006/07.

5.66 Conversely, enquiry levels for units of 500-1000 sq ft, and below 500 sq ft, have fallen from peaks in 2003/04 and 2002/03 respectively, with sizes below 500 sq ft being the least in demand by 2006/07. This indicates a linkage to supply-side issues regarding a lack of high quality accommodation within this size bracket, highlighted by the Halton Borough Council Commercial Property Review (2007). As a consequence, a boost in high-quality supply could heighten interest in units of this size.

5.67 Interest in units sized above 5000 sq ft has remained relatively steady, yet has experienced a decrease from 2005/06 to its lowest point of demand across the past five years.

5.68 The following graph summarises the enquiries for industrial units, by size, in the Borough.
Figure 5.9: Property Size Requirements for Industrial Enquiries (sq ft) in Halton

Source: Halton Borough Council

5.69 The graph above indicates that the requirements for industrial units have been predominantly for 1000-5000 sq ft over the last five years, although this size interval has experienced a decrease since its peak in 2004/05. A similar trend is apparent for units below 1000 sq ft which, as of 2006/07, is the least in demand.

5.70 Conversely, requests for larger units above 10,000 sq ft have seen a sharp increase over the same period. Enquiries for industrial units have remained relatively low in the 5000-10,000 sq ft size interval and have maintained a steady level trend.

5.71 Again, demand may be constrained by supply due to the lack of high quality, fit-for-purpose industrial space, as suggested by the Halton Borough Council Commercial Property Review (2007), for unit sizes from 0-2000 sq ft and 5000-10,000 sq ft. As such, improvements to the quality of stock in this size range are vital.

5.72 The following graph summarises the enquiries for retail units, by size, in the Borough.
Figure 5.10: Property Size Requirements for Retail Enquiries (sq ft) in Halton

Source: Halton Borough Council

5.73 The data suggests that the majority of enquiries from prospective tenants has been for units of 500-1000 sq ft, yet since 2003/04 (45 enquiries) this size interval has seen a steep decrease to 16 enquiries in 2006/07. In contrast, enquires for 1000-5000 sq ft accommodation has experienced a trend of gradual increase and, as of 2006/07, is the size most in demand (16 enquiries).

5.74 The enquiry levels for units above 5000 sq ft and below 500 sq ft have remained relatively low in the past five years indicating a lower level of interest in these size extremes in the Halton market. Nevertheless, enquiries have risen slightly from 2004/05, which indicates a mild rise in interest, yet the difference is only 2-3 enquires.

5.75 The following graph summarises the preferred location for units, across use classes, in the Borough.
Figure 5.11: Preferred Enquiry Location within Halton

Source: Halton Borough Council

5.76 The data suggests that the majority of enquiries are regarding the Borough as a whole, which indicates that prospective tenants perceive there to be little difference between the quality of location in Runcorn or Widnes. This is supported further by the similarities in enquiry levels for the individual towns, which demonstrates a comparable, and relatively parallel, trend.

Market Health

5.77 Rental values provide an indication of the relative performance of stock, which is influenced by the quality of stock and the level of demand recorded.

5.78 In order to illustrate spatial distinctions within the industrial and office market an assessment has been made of recently conducted deals for such premises. The following table provides a summary of transactions recorded over the last two years.
### Figure 5.12: Recent Industrial and Office Transactions within Halton

<table>
<thead>
<tr>
<th>Address</th>
<th>Use Type</th>
<th>Date of Transaction</th>
<th>Value</th>
<th>Size (Sq.ft)</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>4 Jensen Court, Astmoor Industrial Estate, Runcorn, WA7 1SQ.</td>
<td>Ind</td>
<td>1st July 2005</td>
<td>£4.25 p.s.f</td>
<td>4,934</td>
<td>Runcorn</td>
</tr>
<tr>
<td>18 Berkeley Court, Manor Park, Runcorn, WA7 1TQ.</td>
<td>Ind</td>
<td>1st March 2006</td>
<td>£3.50 p.s.f</td>
<td>8,480</td>
<td>Runcorn</td>
</tr>
<tr>
<td>Colloids Ltd, Astmoor Industrial Estate, Davy Road, Runcorn, WA7 1PZ.</td>
<td>Ind</td>
<td>1st March 2006</td>
<td>326,000 (f.s)</td>
<td>32,610</td>
<td>Runcorn</td>
</tr>
<tr>
<td>19-20 Astmoor Industrial Estate, Arkwright Road, Runcorn, WA7 1NU.</td>
<td>Ind</td>
<td>1st July 2006</td>
<td>£2.88 p.s.f</td>
<td>6,426</td>
<td>Runcorn</td>
</tr>
<tr>
<td>Unit 3 Queensway Trading Estate, Waterloo Road, Widnes, WA8 0FD.</td>
<td>Ind</td>
<td>1st Oct 2006</td>
<td>£5.25 p.s.f</td>
<td>4,950</td>
<td>Widnes</td>
</tr>
<tr>
<td>11 Boleyn Court, Manor Park, Runcorn, WA7 1SR.</td>
<td>Ind</td>
<td>2nd Oct 2006</td>
<td>£4.98 p.s.f</td>
<td>5,826</td>
<td>Runcorn</td>
</tr>
<tr>
<td>Charter House, Victoria Road, Runcorn, WA7 5SS.</td>
<td>Office</td>
<td>1st Dec 2006</td>
<td>£7.66 p.s.f</td>
<td>1,306</td>
<td>Runcorn</td>
</tr>
<tr>
<td>Daresbury Park, Daresbury, WA4 4BU.</td>
<td>Office</td>
<td>1st Dec 2006</td>
<td>£17.25 p.s.f</td>
<td>73,312</td>
<td>Daresbury</td>
</tr>
<tr>
<td>6 Everite Road Industrial Estate, Westgate, Widnes, WA8 8RA.</td>
<td>Ind</td>
<td>5th Dec 2006</td>
<td>£3.75 p.s.f</td>
<td>4,908</td>
<td>Widnes</td>
</tr>
<tr>
<td>Industrial Unit, Everite Road, Widnes, WA8 8PT.</td>
<td>Ind</td>
<td>1st Feb 2007</td>
<td>£1,300,000 (FH)</td>
<td>25,175</td>
<td>Widnes</td>
</tr>
<tr>
<td>Brook Chambers, High Street, Runcorn, WA7 1JH.</td>
<td>Office</td>
<td>1st March 2007</td>
<td>£100,000 (f.s)</td>
<td>1,033</td>
<td>Runcorn</td>
</tr>
<tr>
<td>3 Kings Court, Manor Farm Road, Runcorn, WA7 1HR.</td>
<td>Office</td>
<td>1st March 2007</td>
<td>£14.55 p.s.f</td>
<td>44,600</td>
<td>Runcorn</td>
</tr>
<tr>
<td>1-9 Towngate Business Centre, Everite Road, Widnes, WA8 8PT.</td>
<td>Ind</td>
<td>30th April 2007</td>
<td>£53.45 p.s.f</td>
<td>8,548</td>
<td>Widnes</td>
</tr>
<tr>
<td>2 Everite Road Industrial Estate, Westgate, Widnes, WA8 8RA.</td>
<td>Ind</td>
<td>1st May 2007</td>
<td>£3.75 p.s.f</td>
<td>4,908</td>
<td>Widnes</td>
</tr>
</tbody>
</table>

*Source: Focusnet, 2007*

5.79 The summary of office and industrial transactions above facilitates subsequent analysis of comparable rateable values in the Borough. Furthermore, detail was added to this process through consultation with office and industrial market analysts at GVA Grimley LLP.
Analyses of office transactions indicates towards the strength of the Daresbury Park location in Runcorn, with prime rents at £17.25 p.s.f as of September 2007, due to its strategic location, high quality accommodation and landscaping resulting in high demand from large, multinational corporations.

Lower rental values are dominant for other office accommodation located in Runcorn and Widnes, due to a lack of strategic positioning and high quality infrastructure, resulting in a locally sustaining market with little wider sub-regional or regional market draw.

Analysis of industrial transactions reveals that market demand is low in several areas of Runcorn as a result of poor, outdated accommodation, which has impacted on rental values. Of particular concern is Astmoor Industrial Estate, where transaction values are low at £2.88 p.s.f to £4.25 p.s.f, with analysts indicating that demand is extremely low and the estate only succeeds in attracting indigenous companies as occupiers. Yields were perceived to be highly fluctuant, with high quality newer stock, such as that at Manor Park Phase 3 obtaining 8.5%, whereas lower quality accommodation obtained from 12% - 14%.

Take-up of Employment Land

The following tables illustrate the number of completions in total, on brownfield and on greenfield land, and by use class respectively for the period of 1996 to 2007. This information has been obtained from the Local Authority and is up to date as of 7th September 2007, taken from employment monitoring work within Halton.

Figure 5.13: Completed Development Land in Halton: 1996-2007

<table>
<thead>
<tr>
<th>Completed Development Land in Halton (ha)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Year</strong></td>
</tr>
<tr>
<td>---------</td>
</tr>
<tr>
<td>1996/97</td>
</tr>
<tr>
<td>1997/98</td>
</tr>
<tr>
<td>1998/99</td>
</tr>
<tr>
<td>1999/00</td>
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<tr>
<td>2000/01</td>
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<td>2001/02</td>
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<td>2002/03</td>
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<tr>
<td>2003/04</td>
</tr>
<tr>
<td>2004/05</td>
</tr>
<tr>
<td>2005/06</td>
</tr>
<tr>
<td>2006/07</td>
</tr>
<tr>
<td><strong>Total</strong></td>
</tr>
<tr>
<td><strong>Average</strong></td>
</tr>
<tr>
<td><strong>51.8</strong></td>
</tr>
</tbody>
</table>

5.84 In total, 180.86 ha of employment land has been identified, and developed, within Halton over the period 1996 to 2007, which equates to an average annual development of 16.44 ha. In terms of PDL, 87.16 ha (48.19%) of completions were brownfield, demonstrating the predominant utilisation of greenfield land within the Borough; totalling 93.7 ha or 51.8%.

5.85 Completions peaked in 1997/9 (39.14 ha), in line with a large increase in greenfield usage (29.76 ha or 76.03%), and fluctuated considerably until a recent rise in 2005/06 to 26.66 ha that has been sustained during 2006/07 at 23.11 ha. This recent increase is predominantly the result of a substantial increase in brownfield land completions, alongside a trend of decreasing greenfield completions, throughout the ten-year period of analysis.

Figure 5.14: Completed Development on Brownfield & Greenfield Land (ha) in Halton: 1996-2007


5.86 The statistical breakdown of completions, in terms of size (ha) and use class, is presented in the following table for the period 1996 to 2007.
Figure 5.15: Completions (ha) in Halton by Use-Class: 1996-2007

<table>
<thead>
<tr>
<th>Use Class</th>
<th>B1 (a)</th>
<th>B1 (b)</th>
<th>B1 (c)</th>
<th>B2</th>
<th>B8</th>
</tr>
</thead>
<tbody>
<tr>
<td>1996/1997</td>
<td>5.38</td>
<td>0</td>
<td>0</td>
<td>1.58</td>
<td>0</td>
</tr>
<tr>
<td>1997/1998</td>
<td>37.77</td>
<td>0</td>
<td>0</td>
<td>1.14</td>
<td>0</td>
</tr>
<tr>
<td>1998/1999</td>
<td>0.8</td>
<td>0</td>
<td>0</td>
<td>0.33</td>
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<tr>
<td>1999/00</td>
<td>13.31</td>
<td>0</td>
<td>0</td>
<td>1.16</td>
<td>0</td>
</tr>
<tr>
<td>2000/01</td>
<td>13.48</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>10.15</td>
</tr>
<tr>
<td>2001/02</td>
<td>1.25</td>
<td>0</td>
<td>0</td>
<td>2.42</td>
<td>9.67</td>
</tr>
<tr>
<td>2002/03</td>
<td>12.34</td>
<td>0</td>
<td>0</td>
<td>2.16</td>
<td>1.02</td>
</tr>
<tr>
<td>2003/04</td>
<td>6.35</td>
<td>0</td>
<td>0</td>
<td>1.38</td>
<td>2.89</td>
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<tr>
<td>2004/05</td>
<td>2.77</td>
<td>0</td>
<td>0</td>
<td>2.38</td>
<td>0.54</td>
</tr>
<tr>
<td>2005/06</td>
<td>6.82</td>
<td>0</td>
<td>0</td>
<td>11.4</td>
<td>4.03</td>
</tr>
<tr>
<td>2006/07</td>
<td>3.06</td>
<td>0</td>
<td>0</td>
<td>10.08</td>
<td>9.97</td>
</tr>
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<td>103.33</td>
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<td>34.03</td>
<td>38.27</td>
</tr>
<tr>
<td>as %</td>
<td>56.8</td>
<td>0</td>
<td>0</td>
<td>18.7</td>
<td>21.1</td>
</tr>
</tbody>
</table>


5.87 These findings are summarised graphically below, as use-class completion totals, for the last decade.

Figure 5.16: Business & Property Development by Use-Class (%) in Halton: 1996-2007

5.88 To summarise, it is apparent that development within Halton has gradually shifted, from predominantly greenfield, towards brownfield sites over the past decade.

5.89 For example, Feralco UK Ltd recently completed (2006/07) a new B2 industrial brownfield development, on Ditton Road in the Riverside ward of Widnes, within the boundary of the West Bank Impact Area. The site measures 1.7 ha and will be utilised for the production of water treatment and process chemicals.

5.90 Simultaneously, business offices, industrial development and storage/distribution uses have, respectively, formed the mainstay of business and property development over the same period. The following section will assess whether a similar trend is continuing within future development activity.

Recent Development Activity

5.91 This section of the report will look to investigate the level of development, and prospective (pipeline) development, within Halton.

5.92 The following table, presented through utilisation of data received from Halton Borough Council in September 2007, demonstrates the volume of recent completions within the Borough.

![Table](image)

**Figure 5.17: Recent Development Activity in Halton (10/09/2007)**

- **Developer**: Easelside Developments, St Modwen, Marshalls, PTS, Ashalls, Marshalls
- **Project Title**: Ditton Court, Heron Business Park Phase I, Fresenius Kabi, Daresbury point, Abbots Park Phase II, Domino Park
- **Type**: Ind (Industrial), Office
- **Units**: 5, 11, 1
- **Total Size (Sq ft.)**: 15,070, 50,184, 140,000, 15,000, 39,860, 45,000
- **Location**: Halebank, Widnes Waterfront, Manor Park
- **Status (2006/07)**: Completed, Completed, Completed, Completed, Completed, Completed

December 2007
St Modwen | Liebig Court | Retail | 7 | 8,029 | Widnes Towncentre | Completed
Maple Grove | Daresbury 7000 | Office | 8 | 40,100 | Daresbury Park | Completed
Saffil | Saffil | Office | 1 | 6,474 | Widnes Waterfront | Completed

Total = 359,717

Source: Halton Borough Council

5.93 In total, 359,717 sq ft of land has been developed for office, industrial or retail uses during 2006/07. The data suggests that office development has been the majority end use.

Development Pipeline

5.94 In terms of prospective development, office development is undoubtedly dominant. The latest data, supplied by Halton Borough Council on the 10th September 2007, is presented in the following table.

Figure 5.18: Hakon Development Pipeline (10/09/2007)

<table>
<thead>
<tr>
<th>Developer</th>
<th>Project Name</th>
<th>Type</th>
<th>No of Units</th>
<th>Total Size (Sq ft)</th>
<th>Location</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marshalls</td>
<td>Evenwood Close</td>
<td>Office</td>
<td>6</td>
<td>25,000</td>
<td>Manor Park</td>
<td>Construction</td>
</tr>
<tr>
<td>St Modwen</td>
<td>Bridge Retail Park</td>
<td>Retail</td>
<td>2</td>
<td>29,100</td>
<td>Runcorn Old Town</td>
<td>Construction</td>
</tr>
<tr>
<td>Chantry Developments</td>
<td>Clifton House</td>
<td>Office</td>
<td>1</td>
<td>20,000</td>
<td>Ashley</td>
<td>Construction</td>
</tr>
<tr>
<td>Property Alliance</td>
<td>B&amp;Q</td>
<td>Retail</td>
<td>3</td>
<td>49,000</td>
<td>Widnes Waterfront</td>
<td>Construction</td>
</tr>
<tr>
<td>Easter</td>
<td>Easter Park</td>
<td>Ind</td>
<td>4</td>
<td>102,000</td>
<td>Gorsey Lane</td>
<td>Construction</td>
</tr>
<tr>
<td>EBL</td>
<td>Suttons Quays Phase II</td>
<td>Office</td>
<td>2</td>
<td>14,870</td>
<td>Sutton Quays</td>
<td>Construction</td>
</tr>
<tr>
<td>Gladman</td>
<td>G360 Space</td>
<td>Ind</td>
<td>1</td>
<td>360,000</td>
<td>Manor Park</td>
<td>Construction</td>
</tr>
<tr>
<td>Priority Sites</td>
<td>Turnstone Business Park</td>
<td>Office</td>
<td>13</td>
<td>37,500</td>
<td>Widnes Waterfront</td>
<td>Construction</td>
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<tr>
<td>----------------</td>
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<td>--------</td>
<td>----</td>
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<td>------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Priority Sites</td>
<td>Turnstone Business Park</td>
<td>Hybrid</td>
<td>5</td>
<td>16,148</td>
<td>Widnes Waterfront</td>
<td>Construction</td>
</tr>
<tr>
<td>SOG</td>
<td>The Heath</td>
<td>Office</td>
<td>8</td>
<td>187,000</td>
<td>Runcorn Old Town</td>
<td>Planning Granted</td>
</tr>
<tr>
<td>Forward Construction</td>
<td>Forward Point</td>
<td>Office</td>
<td>3</td>
<td>16,561</td>
<td>Widnes Waterfront</td>
<td>Planning Granted</td>
</tr>
<tr>
<td>Langtree</td>
<td>Widnes Waterfront</td>
<td>Office</td>
<td>1</td>
<td>30,935</td>
<td>Widnes Waterfront</td>
<td>Proposed</td>
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<tr>
<td>Marshall Park</td>
<td>Daresbury Park</td>
<td>Office</td>
<td>23</td>
<td>209,099</td>
<td>Daresbury Park</td>
<td>Proposed</td>
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<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
<td>1,097,213</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Source: Halton Borough Council*

**5.95** There appears to be a significant level of development proposed, or under construction, within the Borough. In fact, a total of 1,097,213 sq ft of land in Halton is proposed development, under construction or had gained planning permission and is awaiting construction to commence.

**5.96** Nevertheless, vacancy has crept up within certain areas. The following section will investigate the current situation in the Borough.

**Vacancy**

**5.97** As previously noted vacancy has developed into a significant issue within a number of the increasingly dated segments of the Borough’s employment areas. The levels of vacancy within Halton, in terms of unit size and unit numbers within specific industrial areas, are presented in the following graphs:
5.98 The evidence presented indicates the highest levels of vacancy within the Borough are within the smaller to medium scale units, particularly ranging from 1000-5000 sq ft (22 units) and 10,000-20,000 sq ft (24 units). Combined, these two segments of the market represent a maximum availability of 590,000 sq ft based on calculations of the upper limit of each interval.
There is also a high level of vacancy in smaller units, below 1000 sq ft and the largest units (>100,000 sq ft): each with 5 vacancies.

5.99 This supports assertions to suggest that it is the quality of stock deterring prospective occupants, due to enquiry based demand being highest for the smaller stock with the higher vacancy rates. Here supply is likely to be impacting severely upon demand.

5.100 The data also supports evidence discussed earlier in this report, clearly demonstrating the highest levels of vacancy, well and above the general trend within the Borough, at Astmoor and Manor Park industrial areas. The data confirms that these sites have 26 and 25 units vacant, equating to 27% and 18% of their total available building stock, respectively. Furthermore, updated information received from Halton Borough Council indicates the number of vacancies at Manor Park has increased to 32 in November, equating to a rate of vacancy at 21%.

5.101 The majority of vacant units (18) are situated in the oldest area of the industrial estate area of Manor Park One, which was developed from 1983, and where a number of the units are getting increasingly tired. Furthermore, this area has been particularly affected by the loss of companies who occupied multiple units and due to their current availability as leasehold only, this is not responding to a market context favouring strong demand for freehold, or brand new units, available to lease elsewhere at a similar rental value.

5.102 Indeed, there is stronger demand where the landlord has invested in the refurbishment of older property, such as Canalside, an 80,000 sq ft industrial unit, and at Avon House; a 10,000 sq ft office development. Similarly, newer development in Manor Park Phase II, and the on-going Phase III, is of a higher quality – reflecting current occupier requirements, and is in demand.

5.103 Hence, Astmoor in particular, represents a hugely underutilised asset, and provides strong justification for intervention, particularly when the aforementioned future economic growth opportunities for the Borough, outlined at a regional and city-regional level, are taken into account.

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23 Nevertheless, the BE Group / Tushingham Moore Halton Commercial Property Review (February 2007) suggests that, due to the private sector responding to market needs at Manor Park, there little need for significant intervention at this employment site at present.
Employment Areas - the Surrounding Locality

5.104 There are a number of schemes in the locality surrounding Halton that are likely to have some impact upon development and the property market in the Borough as there will be some overlap and likely competition for occupiers. These are as follows:

- **Warrington**: Land supply is scarce in the area with few development opportunities left at the towns major business parks of Winwick Quay, Gemini, Birchwood Science Park, Risley and the Grange. Omega could provide a substantial competitor to Halton, located both sides of Junctions 7 and 8 of the M62. This site is expected to offer 7 million sq ft of office, industrial, high tech and distribution floorspace, creating approximately 24,000 new job opportunities as a direct result. However, having only recently received planning permission, secured by GVA Grimley, development is unlikely to progress prior to 2010, and over a 15 year period. As a result Halton could provide an attractive, low-cost solution to companies looking for larger accommodation, or a position south of the Thelwall Viaduct, offering improved accessibility to Cheshire and the South.

- **Vale Royal**: This Borough lies to the South of Halton and is relatively rural, with the nearest competing quality office scheme being Cheshire Oaks Business Park located along the M56 at Junction 10 of the M53 in Ellesmere Port. However, this area is less related to Halton’s market than to the Wirral’s. Both Winsford Industrial Estate and Gadbrook Park at Northwich are nearing maximum development capacity and are more related to the Cheshire M6 corridor than to Halton’s market.

- **St Helens**: This Borough is situated to the North of Halton, yet schemes in the East, including Haydock Industrial Estate, Old Boston Trading Estate and The Parks, are viewed by Halton Borough Council as related predominantly to the M6/A560 market. Nevertheless, potential competition can be identified within the South of the Borough centring on Junction 7 of the M62. In this area, several schemes are coming forward including Sherdley Business Park, of which Phase 1 comprises of 18 industrial units of 2500-4500 sq ft, with Phase 2 coming forward to develop the remaining 8 ha of available land. In addition, 6 ha is being developed by Priority Sites for 5000-10,000 sq ft industrial units at Sutton Fold Industrial Estate, 8 ha of development land remains available on Rocket Business Park and Lea Green Business Park provides modern 2000-30,500 sq ft business units for SME’s. The NWDA also proposes to develop a high quality business park on 10 ha nearby at Lea Green Farm West.

- **Knowsley**: This area has several high quality employment areas, of which the closest to Halton being a specialist automotive corporate and pharmaceutical supplier park;
Boulevard Industry Park. Further North is Huyton Industrial Estate, situated at the intersection of the M57 and M62 motorways, which contains several high profile companies due to its accessibility, including BASF.

- **Liverpool**: The South East section of this area, known as Speke Halewood, directly competes with Halton due the shared communication benefits of proximity to the M62. This is now Liverpool’s premier out-of-town retail and office business area, attracting substantial inward investment from major employers including Jaguar cars, Getrag Ford, Eli Lilly and established names such as Marriott Hotels, HBOS, Vertex, DHL International and Chiron Vaccines.

5.105 Overall, despite a number of existing, and forthcoming, industrial developments surrounding Halton appearing likely to impact on the market for occupiers within the Borough, only Omega is considered by the Council to be of a significant scale to seriously impact on Halton’s developments.

**Key Conclusions from Economic & Commercial Analysis**

5.106 This section has considered the commercial land and property offer of Halton, from which a number of significant conclusions can be drawn.

- In economic terms Halton appears to be performing well within its sub-regional context, and this is forecast to continue. Nevertheless, this could well be tempered by supply-side constraints including a low local labour supply, particularly with employment forecast to expand exponentially. This assertion is supported by income and wages assessment, which indicates towards the prevalence of inward employment-based commuting currently within Halton. Hence, analysis indicates that the Mersey Gateway Bridge will provide a vital access improvement to establish the level of inward commuting required to allow the Halton economy to develop unhindered.

- Furthermore, vacancy has increased in several key employment areas within the Mersey Gateway regeneration area, negatively affecting the health of the market. A particular concern is Astmoor Industrial Estate in Runcorn, which is operating with 25% vacancy levels. With enquiry prevalence centred upon the unit sizes exhibiting highest vacancy (0-20,000sq ft), this appears to highlight a further supply-side constraint associated specifically with the low quality, and ageing, commercial stock in the area. Such supply constraint is likely, over time, to affect demand in the area. Investment in commercial stock should be a key economic concern.
• In terms of supply, there are a combined 230.94\textsuperscript{26} ha of greenfield, and brownfield, employment land available within Halton as of 2007. This volume is sufficient to support demand through to 2018, yet the majority of land is allocated to regional strategic sites, such as Daresbury SIC, or is discounted for local uses\textsuperscript{27}. Although such strategic sites are performing well, this is placing constraint on the expansion and start-up capabilities of SME’s, which are the mainstay of the local economy in Halton. As such, redevelopment on PDL, and any pipeline development should focus on meeting the requirements of this business sector to allow natural growth in the market and encourage inward business migration at a regional scale.

\textsuperscript{27} Halton Commercial Property Review (February 2007) – BE Group. This refers to currently undeveloped land and infill opportunities on existing employment sites.
6. MERSEY GATEWAY BUSINESS SURVEY

6.1 In October 2007, Spirul Intelligent Research was commissioned by GVA Grimley (on behalf of Halton Borough Council) to conduct a telephone survey of 200 businesses located within the Mersey Gateway Impact Area regarding the Mersey Gateway Bridge and Regeneration Strategy.

6.2 This chapter provides quantitative and qualitative analysis of the feedback received from local businesses, which has shaped the subsequent development of proposals and concepts.

Background & Aims

6.3 A business survey was deemed to provide an integral understanding of the current, and projected, business context within the Borough in order to assess the perceived impact of the Mersey Gateway Bridge and associated Regeneration Strategy upon businesses in the Runcorn and Widnes area. Specifically, the survey aimed to:

- Ascertain the location factors businesses believed to be the most important regarding performance;
- Ascertain the impact of existing congestion on the A557, and the Silver Jubilee Bridge, on businesses and staff;
- Gain a comprehensive understanding of the attitudes of local businesses towards the proposals for the Mersey Gateway project with regards to key issues of future productivity, performance and the impact of tolling on the Bridge.

6.4 The following section will introduce the findings of the business survey.

Findings

6.5 This section will be divided into several key areas of data analysis in order to facilitate the achievement of the aforementioned survey aims.

The Importance and Impact of Transport Communications

Locational Advantages

6.6 Participating businesses in both Runcorn and Widnes highlighted close proximity to the motorway network (M56/M6/M62) as the central advantage of their present location in Halton.
This was viewed as marginally more beneficial by businesses in Widnes (56%) than in Runcorn (43%).

6.7 Businesses stressed that the strongest influences on performance in their current location stemmed from the ability to access markets and customers (51%), local economic performance (22%) and access to a highly skilled, quality, local labour force (19%). Indeed, this will be analysed further in the following section regarding performance.

6.8 The economic importance of geographical location to participating businesses in Halton was further underscored by the realisation that the majority of their customers and employees were sourced from within a 10-mile radius of the business itself. In fact, 16% of businesses indicated that 100% of their customers were situated within a 10-mile radius, and a further 42% indicated that the figure was 75-100%. 57% of businesses had 0% of their customers based further than 50 miles away.

6.9 Similarly, 54% of businesses stated that 100% of their employees were based within a 10-mile radius of their location and 93% indicated that no employees were based further away than 50 miles.

6.10 However, the issue of congestion was found to factor highly as a current, and future concern for businesses located within Halton.

*Locational Disadvantages - Congestion*

6.11 Participating businesses highlighted that, at present, 62% of their workforce utilise the A557 and Jubilee Bridge to commute on a daily basis and 36% and 35% respectively use the bridge for business travel and the delivery/distribution of goods and services on a daily basis.

6.12 This necessity for employees to use the A557 and Jubilee Bridge was viewed as a major hindrance to businesses in Halton, with the majority (40%) stating traffic congestion during peak hours as a 'very big problem', and 9% of businesses finding congestion outside of peak hours as a 'very big problem'.

6.13 As a consequence the majority of businesses (31%) believed planning journey times on the A557 and Jubilee Bridge to be 'fairly difficult' and 19% of businesses reported that all staff as being affected by peak hour congestion delays.

6.14 Furthermore, 31% of businesses in Widnes, and 28% of businesses in Runcorn, felt that congestion had resulted in a 'fairly negative' impact on workforce morale/productivity over the past three years.
6.15 In addition, 31% of businesses in Widnes, and 28% of businesses in Runcorn, felt that congestion on the A557 and Jubilee Bridge had resulted in a 'fairly negative' impact on the ability of customers and suppliers to visit their business over the past three years.

6.16 Hence, businesses in Runcorn and Widnes both pinpointed congestion on the A557, especially the Silver Jubilee Bridge, and its unreliability, as the foremost disadvantage of their location within Halton. This was viewed as a slightly larger problem for businesses in Widnes (38%), than in Runcorn (35%).

6.17 Furthermore, 15% of businesses believed that the impact of congestion on the A557, and in particular on the Silver Jubilee Bridge, would have a 'very negative' impact on their business over the next three years, and the majority of businesses (38%) felt congestion would have a 'fairly negative' impact.

Current and Projected Business Performance

Current Performance

6.18 The majority of participating businesses had small employment bases, with 53% having fewer than 5 full-time staff and 54% of businesses having fewer than 5 part-time staff.

6.19 Overall, the majority of businesses (43%) reported that their company performance had been 'fairly good' over the previous three years. As previously mentioned, businesses highlighted the pivotal influences on performance as the ability to access markets and customers, local economic performance and access to a highly skilled, quality, local labour force. Businesses in both Runcorn and Widnes cited access to markets and customers as being most important, although this was slightly more important to businesses located in Runcorn (54%) than Widnes (46%).

Projected Performance

6.20 The majority of surveyed businesses believe performance will be 'fairly good' over the forthcoming three years. The central factors were, again, deemed to be access to markets and customers (56%) and access to a highly skilled local labour force (21%).

6.21 Nevertheless, businesses were relatively conservative in their predictions for future productivity expansion over the next three years. The majority of businesses thought that turnover would 'increase a fair amount' (46%) or stay the same as now (32%). Profit would mostly 'increase a fair amount' (45%), or stay the same (32%), and employee numbers would mostly stay the same (49%) or 'increase a fair amount' (32%).
Perceived Impact of the Mersey Gateway

6.22 When questioned what impact the building of the Mersey Gateway would have on business performance, over and above what would occur anyway, over the next three years the response indicated that 11% of businesses felt it would have a 'very positive' impact and 29% felt it would have a 'fairly positive' impact. Only 3% felt it would be 'very negative'.

6.23 As a consequence, 6% of businesses surveyed believed that the development of the Mersey Gateway was 'extremely important' to their economic prospects over the next three years, and a further 27% of businesses felt it to be 'fairly important'.

6.24 Hence, 28% of participating businesses in Widnes, and 22% in Runcorn, highlighted that the Mersey Gateway will have a 'fairly positive' effect on company turnover and 24%, and 21% respectively, believe it will have a 'fairly positive' effect on the size of their company's market.

6.25 In addition, two of the participating businesses stated that they already had plans to create additional long-term jobs as a result of the Mersey Gateway proposals – 50% of which would be in the skilled sector.

6.26 Opinions on the perceived effect of the Mersey Gateway on business performance were found to differ significantly across economic business sectors. The following provides a sectoral assessment of the qualitative responses received:

- Banking & Finance - This sector found the proposals broadly positive for increasing trade and improving journey times for clients:
  
  ‘...any new road would improve journey times, so any development which may bring in more clients can only be a good thing’

  ‘Regeneration being brought into the area is always good for our type of business’

  ‘There is a possibility of more trade’

- Building & Construction – Responses from this sector were less positive as they currently avoid the Bridge when possible:

  ‘[performance] depends on the cost of the toll...’

  ‘Don’t use it (bridge)’

  ‘Don’t rely on the bridge - so not that big of an issue for us’

  ‘Prevents being late because of congestion – sometimes 1.5 hours late’
• Business Services: This sector highlighted that much of their business was performed via email, meaning a new bridge impacted them less than other sectors, yet the bridge would have a positive impact on their need to travel promptly to meetings:

'...business here is done entirely through fax and email'

'Currently, traffic is an issue for new clients'

'...less traffic jams to get to meetings'

• Chemical & Pharmaceutical: Businesses were concerned that the toll would prove too costly for their staff, and that public transport would not be sufficient as a cheaper modal alternative for commuting:

'The level of toll will affect how many people use it'

'Some staff may not be able to pay costs involved with the toll—staff morale will be affected...'

'...a lot of staff will not be able to afford the additional cost to get to work. Public transport is poor in this area so you do need a car to get to work'

'...people may use it more if it's not tolled'

• Engineering & Electronics – Businesses expressed concern over the close proximity of the new bridge and the resulting building noise, whilst several noted that the impact would be minimal as they avoid the bridge:

'...heavy impact of building – noise pollution'

'Increased reliability would lead to better customer service, and would encourage repeat business'

'Don't use it'

• IT, Telecommunication and Communications – This sector highlighted that the Mersey Gateway proposals would have little impact due to travelling being generally unnecessary for their business:

'For the nature of my business, it should not have any effect'

'I don't rely on the bridge for business'

• Manufacturing – The majority of comments indicated a belief that the bridge would improve commuting and travel for customers:

'...improved commuting'

'...more companies would pass through and come into the area'
...'would be positive...'

- Other Services: This sector indicated that the Mersey Gateway will encourage more passing trade, make travel easier for customers, and improve delivery times, yet were concerned about the cost of tolling:

  'More people would travel across. Hopefully, investment in the area will lead to regeneration, and tidy the place up’

  'More companies would pass through and come into the area'

- Retail – Businesses expressed concern that the toll may discourage prospective customers using their services:

  'It could go either way. We are located just around the corner from Silver Jubilee Bridge so it could affect us a great deal – pulling people away from the bridge. Especially if it is tolled'  

  'If a toll is charged then everyone is going to go through Warrington instead and cause even more congestion there’

- Tourism, Leisure & Hotels: Businesses had mixed perceptions of the possible benefits:

  '...can’t see it bringing more customers to me...it will affect local people most who have to pay the toll on a daily basis'

  '...more people will be inclined to visit'

- Transport – Businesses in this sector were extremely supportive of the proposals – recognising the benefits of reducing congestion, accelerating journey times and improving goods distribution:

  'We rely on good road systems to distribute our goods; any new bridge will bring much needed relief to the existing bridge’

  'Everything will run more smoothly – ease things up’

- Wholesale: This sector indicated the proposals would improve the capability for delivery schedules to be met, yet concerns over the toll also figured heavily:

  '...could make more deliveries. More possible customers’

  'The toll should only be on the new bridge – immoral way of doing things’

6.27 The following section seeks to develop an understanding of the level of local business support for the Mersey Gateway proposals.
Business Support for the Scheme

6.28 The majority of participating businesses in Halton indicated that they 'strongly support' proposals for the Mersey Gateway – this equated to 49% of businesses in Widnes and 44% in Runcorn. Only an extremely small minority, of 4%, cited some opposition to the project.

6.29 Quantitative sectoral analysis indicates that, from a base of 174 Halton based businesses, a large proportion of business sectors believed the Mersey Gateway will have a positive impact on their performance:

- 100% of businesses in the Banking and Finance sector reported the effect would be 'more positive' due to improving, and generating more, business.
- 55% of businesses in the Wholesale sector reported the effect would be 'more positive' and 33% reported the proposals would make 'no difference'.
- 50% of businesses in the Business Services sector reported the effect would be 'more positive' and 39% reported the proposals would make 'no difference'.
- 50% of businesses in the Transport sector reported the effect would be 'more positive' and 10% reported the proposals would make 'no difference'.
- 50% of businesses in the Chemical and Pharmaceutical sector reported the effect would be 'more positive' and 33% reported the proposals would make 'no difference'.
- 47% of businesses in the Building and Construction sector reported the effect would be 'more positive' and 26% reported the proposals would make 'no difference'.
- 45% of Manufacturing sector businesses reported the effect would be 'more positive' and 27% reported the proposals would make 'no difference'. Only 9% of businesses expect some negative effect.
- 31.4% of businesses in the Other Services sector reported the effect would be 'more positive' and 48.6% reported the proposals would make 'no difference'.
- 27.3% of the Retail sector businesses reported the effect would be 'more positive' and 36.4% reported the proposals would make 'no difference'. This sector was the largest participating, consisting of 28% of the 199 valid responses.
- 18% of businesses in the 'Tourism, Leisure and Hotels sector reported the effect would be 'more positive' and 45.45% reported the proposals would make 'no difference'.

28 It is worth noting that this sector represented 1% of participating businesses.
6.30 The Engineering and Electronics and IT, Telecommunications and Communications sectors believe that the impact of the Mersey Gateway would result in a neutral or more negative business performance outcome. Furthermore, a minority of the Retail, and Other Services sector perceive effect of the proposals to have a negative effect on performance:

- 23% of Engineering and Electronics sector businesses reported the effect would be 'more positive' and 23% reported the proposals would make 'no difference'. In addition, a further 23% reported that impact of the Mersey Gateway would result in a more negative business performance outcome.

- 56% of businesses in the IT, Telecommunications and Communications sector reported that the proposals would make 'no difference' to business performance. 22% of businesses felt it would have a positive effect and a further 11% believed the proposals would result in a negative business performance outcome.

- 11.4% of the Other Services sector businesses reported the expected effect would result in a negative business performance outcome.

- 10.9% of the Retail sector businesses reported the expected effect would result in a negative business performance outcome.

6.31 In addition, participating businesses highlighted the plans to introduce a toll (user charge) on the Mersey Gateway Bridge as a major concern and pivotal drawback.

Opposition to the Scheme – tolling

6.32 Awareness of the plans to introduce a tolling system on the proposed Bridge was found to be very high – at 73% of participating businesses. The majority of businesses indicated that they would 'strongly oppose' the toll even if the Mersey Gateway proposals offering improved journey time and reliability.

6.33 It is important to note however, that 14% of businesses stated their support for the toll proposals. Furthermore, when questioned whether the impact of the Mersey Gateway on their business would be different if the road was not tolled, the majority of businesses (43%) believed that the effect on their business would be 'a lot more positive'. The most widely-held reason cited for this (39%) was because no tolling would 'bring more business and more people would use it'. Views were found to differ widely across economic business sectors.

6.34 The following points present a qualitative sectoral analysis of comments received from businesses:
• Banking & Finance – This sector was in total support of the bridge being free to use, stating the encouragement of people and regeneration into Halton as a central factor:

‘...encourage people to use it more, bring more regeneration into the area – people are more likely to buy houses if the area is being developed’

• Building & Construction – The majority of comments from this sector highlighted that businesses did not feel that the toll would be of any significant impact:

‘...not reliant on the bridge’

‘...for us – not much difference to our business...’

• Business Services – This sector indicated a belief that the bridge would be utilised to a greater extent if it was free, and were concerned about increased costs for staff:

‘People won’t use the bridge if they have to pay a fee, although the bridge has to be paid for in some way’

‘Unfair on staff...’

• Engineering & Electronics – Businesses in this sector were predominantly supportive of the toll:

‘If not tolled, it would come congested’

‘Do not mind paying a toll...’

• IT, Telecommunication and Communications – Business indicated that they believed more people would use the bridge if it was not tolled and, otherwise, it could increase congestion through Warrington:

‘People will go out of their way not to pay the toll, so it would be better if there was no toll’

‘Although the new bridge should be tolled, if the old bridge is as well, it will merely encourage people to drive through Warrington’

• Manufacturing – This sector also expressed concern that traffic would be diverted through Warrington if a toll was introduced and could stop people using services on either side of the bridge.

‘Having a toll would divert more people through Warrington and lead to more congestion problems there’

‘...the toll is the worst thing you could put on the bridge, a lot of businesses are going to suffer in Widnes as people will just stop using the bridge and doing business in Widnes, me included’
Other Services – This sector produced a mixed response to tolling with some businesses seeing the requirement to toll the new bridge, but not the Silver Jubilee, and others concerned with the impact a reduction in bridge usage could have on their levels of custom.

‘Got to be tolled. Needs to be to recover costs and people have to pay elsewhere so should also there. Should be a discount for locals though’

‘Not having a toll would keep costs down. Also, it would be more convenient for customers, and would encourage them to travel across the river...’

Retail – This sector demonstrated strong support for the bridge to be free from tolling, particularly due to a concern it may lead to a reduction in footfall to businesses:

‘If no toll the business would be improved – more access to customers. But, toll means people may shop on the other side of the water and reduce business...’

Tourism, Leisure & Hotels – This sector was in strong opposition to tolling, with businesses viewing a toll as an additional tax on local people and an impediment on commuters:

‘...a toll is another tax on local people’

‘People would not be put off travelling across if it were free to use’

Wholesale – This sector produced a mixed response to the tolling issue, with a recognition that the bridge must be paid for, and its importance in reducing congestion, but were concerned that measures should be introduced to ensure locals are not overburdened by the toll.

‘People choose to use the toll on the M6, people can take a different route if they don’t want to pay, they have that option, so if you want to speed up your journey you simply have to pay’

‘The road and Council would have a lot more support from locals – the general impression is that the government are just trying to squeeze more money out of the public and honest small business people. Local people should feel they are supported by the Council’
Key Issues & Conclusions

6.35 It is apparent that businesses in both Runcorn and Widnes value close proximity to the motorway network (M56/M6/M62) as the central advantage of their present location in Halton in order to gain access markets and customers, benefit from local economic performance, a strong local business base, and ensure access to a highly skilled, quality, local labour force.

6.36 However, respondents confirmed that congestion is, at present, undermining the performance potential for businesses in Halton. For, businesses in Runcorn and Widnes both highlighted congestion on the A557, especially the Silver Jubilee Bridge as the central disadvantage of their location.

6.37 Furthermore, when questioned what impact the building of the Mersey Gateway would have on business performance over the next three years, over and above the businesses conservative predictions of what would occur anyway, the response indicated that a high proportion of businesses believed the proposals will result in a positive performance impact.

6.38 Indeed quantitative business survey evidence indicates that businesses in the Banking and Finance, Wholesale, Business Services, Transport, Chemical and Pharmaceutical and Building and Construction sectors believe that the proposals for the Mersey Gateway will have a positive impact on their performance.

6.39 As a consequence, the majority of participating businesses in Halton concluded that they would 'strongly support' proposals for the Mersey Gateway – equating to 49% and 44% of businesses in Widnes in Runcorn respectively. Indeed 6% of businesses believed that the development of the Mersey Gateway was 'extremely important' to their economic prospects over the next three years, and a further 27% of businesses felt it to be 'fairly important'.

6.40 Nevertheless, a major issue of concern, across all business sectors, was the proposed introduction of user charging (tolling) on the Mersey Gateway and existing Silver Jubilee bridges. This, it was believed, would be likely to 'put off' prospective clients and customers from crossing the Mersey to utilise business services, would place increased financial stress on employees, or subsidising employers, to meet the cost of commuting across the Mersey, and would be overly punitive on local residents.

6.41 Instead, it was advocated by the majority of businesses that either only one, or neither, of the bridges should be tolled. This would, it was proposed, have 'a lot more positive' impact on their business. The most widely-held reason cited for this was because no tolling would 'bring
more business and more people would use it', although views differed across the business sectors within Halton.
7. HOUSING MARKET

7.1 This chapter provides an analysis of the housing market considering both the supply (stock) of housing and the performance of the active market. The analysis is structured as follows:

- Economic & Demographic Drivers
- Housing Market Profile
- Drivers of Stock Change
- Quality of Housing Stock
- Occupancy
- Future Supply
- Housing Values
- Conclusions for the Mersey Gateway Bridge.

7.2 Analysis is largely undertaken at a local authority level as the major source used to analyse the housing stock are the annually produced Housing Strategy Statistical Appendix (HSSA) returns.

7.3 This data also provides an update of 2001 Census data. However, where smaller spatial levels of analysis have been undertaken Census data has been used as this remains the only consistent data source, which can be mapped at a small spatial scale.

Economic and Demographic Drivers

7.4 Analysis enabled through the lens of the recent Liverpool City Region housing strategy indicates that Halton falls within the Northern Housing Market area, centred on Liverpool, and also including the Merseyside local authorities of Wirral, Sefton, Knowsley and West Lancashire and is thus included within the synopsis of a Northern market characterised in the past by a significant trend of population decline resulting in lower demand for housing.\(^79\)

7.5 However, due to Halton’s central position, the Borough is linked more strongly with the Eastern Housing Market area, centred on Warrington and including parts of Wigan, Vale

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\(^79\) Liverpool City Region Housing Strategy ‘Northern Housing Market Assessment’ (January 2007) GVA Grimley
Royal, St Helens and Halton to the west. This area may be best understood as a linear region based on employment centres related to the M6 and the West Coast main line, with evidence of population movement southwards from Warrington and Halton into Vale Royal and even Crewe and Nantwich.

7.6 As a consequence, Halton is also situated within an Eastern Housing Market characterised by strong links with both Merseyside and Cheshire, a good mixture of housing tenure and type and a gradual population increase.

7.7 Nevertheless, the Eastern housing market area is projected to experience marked differences in population growth with Warrington expected to continue growing whilst St Helens declines and Halton stagnates. Significant house price rises within the Eastern market area coupled with a number of localised areas of lower income mean that affordability is becoming an increasing problem within this housing market area. Warrington and Vale Royal have a labour-force capacity to participate in and support the development of higher value industry, with a direct contrast apparent within Halton and St Helens where the labourforce is skewed towards lower end occupations. The labour-force structure is consequently acting as both an economic enabler and constraint on future growth potential.30

7.8 The aforementioned trend of decline and stagnation has been reflected at the local scale in Halton. Utilising data from Nomisweb, this historical trend is presented in the following graph.

Figure 7.1: Historical Population of Halton: 1981-2006

![Historical Population of Halton: 1981-2006](image)

Source: Nomisweb, 2007

30 Liverpool City Region Housing Strategy ‘Eastern Housing Market Assessment’ (January 2007) GVA Grimley
7.9 The population level, within the Borough, is shown to have fallen from a peak in 1989 on a downwards trend until 2003. Recently, this has shown signs of abating, with the indication towards positive growth figures.

7.10 Utilising population projection statistics from Nomisweb it is possible to summarise this gradual increase in population. This trend is demonstrated in the following graph.

Figure 7.2: Population Projections of Halton: 2004 – 2029

Source: Nomisweb, 2007

7.11 The data suggests that the population in Halton is predicted to steadily rise to over 120,000 by 2022, at which point it is expected to plateau and decline slightly.

Household Growth Projections

7.12 Consequently, the expectation of increased population relates directly to the number of households required to provide accommodation within the Borough over the same period.

7.13 These projections are not an assessment of housing need, nor do they take account of future policies or developments. The sub-regional projections are less reliable than regional ones as smaller household numbers are involved. Using predictions data from Nomisweb, the associated household amplification is demonstrated below.
7.14 As expected, in line with the aforementioned acceleration in population, the number of households is also expected to rise. Comparatively, at a regional level, between 2003 and 2026 growth of only 17.5% is projected for the North West, compared to 23% for England. Growth within Halton is predicted to be relatively conservative, compared to the national and regional scales, equating to an increase of only 12%, or an additional 8,000 households, over the 25 year period.

7.15 This picture is more optimistic than previous projections projecting growth in areas where in the past decline was forecast.

7.16 It is worth noting that this trend is likely to be exacerbated by the national trend for falling household size, with the outcome being an increased requirement for housing.

City-Regional Analysis

7.17 The Liverpool City Region housing strategy also examines the role of the economy as a driver of household change. Its key conclusions for the region suggest that, as a whole, the Northern Housing Market's economy has experienced profound structural changes as it has moved out of the manufacturing economy and developed in the service sector economy.
7.18 This area is subsequently seen to provide a key growth point, where many of the key business service sectors are located and major interventions are planned. This improved outlook for the Northern HMA is based upon a halting of the trend towards population decline that has been in effect for much of the past 2 decades. Recent evidence thus indicates towards an emerging trend of stabilisation and reversal.

7.19 Economic analysis, provided in the previous chapter, highlights that significant employment growth is expected within the Mersey Gateway regeneration area of Halton as a response to demand for labour and constraint in the latent market. In particular, higher occupation growth is expected in the computer services sector as well as lower value occupations, which infers the requirement for an increase in both aspirational, and affordable, housing types to accommodate an influx of residents from outside Halton.

7.20 Furthermore, the second Mersey crossing will provide a vital link in achieving the economic aspirations of the area, in terms of facilitating commuter linkages, particularly with constraint in the labour market appearing set to increase.

7.21 As such, these factors combined highlight the necessity for increased housing stock, in terms of quantity and quality, within the Mersey Gateway regeneration area of Halton, in order to accommodate the heightened requirement for employment in high value and lower occupations.

7.22 The following section will proceed to investigate the profile of the local housing market within the Mersey Gateway regeneration area of Halton.

**Profile of the Housing Market**

**Housing Tenure Profile**

7.23 The breakdown of tenure is a key element of understanding the nature of the existing housing stock.

7.24 The HSSA indicates a total dwelling stock of 52,815 in Halton in April 2006. Of this 26.4% were within the social sector (RSL / local authority) and the remaining majority of 73.6% in the private sector.

7.25 Halton has a relatively high proportion of social housing, at 26.4%, compared to 19.1% regionally across the North West and 17.9% across England and Wales. Correspondingly, the
market sector in the Borough is approximately 8-10% below the respective spatial averages; at 73.6% stock.

7.26 The table below indicates changes in the tenure profile of dwelling stock over the last five years.

**Fig. 7.4: Tenure Profile Change in Halton 2002-2006**

<table>
<thead>
<tr>
<th></th>
<th>Social Sector</th>
<th>Private Sector</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>15,555</td>
<td>35,593</td>
<td>51,148</td>
</tr>
<tr>
<td>2003</td>
<td>15,281</td>
<td>36,074</td>
<td>51,355</td>
</tr>
<tr>
<td>2004</td>
<td>14,661</td>
<td>37,294</td>
<td>51,955</td>
</tr>
<tr>
<td>2005</td>
<td>14,180</td>
<td>37,920</td>
<td>52,100</td>
</tr>
<tr>
<td>2006</td>
<td>14,107</td>
<td>38,514</td>
<td>52,621</td>
</tr>
</tbody>
</table>

*Source: HSSA, 2007*

7.27 The social sector has declined steadily over the last five years, whilst housing growth has been concentrated in the private sector. Subsequently, the social sector has shrunk significantly as a proportion of total housing stock.

7.28 In order to analyse such trends spatially, the current concentration of social housing within the Borough is mapped below.
Figure 7.5 Local Concentration of Social Housing in Halton
7.29 The data highlights the prevalence of social sector housing within the Borough, particularly in the Castlefields areas of Runcorn, with 56.7% to 70.9% of total stock in the social sector. A high concentration of social sector housing (42.6% to 56.7%) is also situated in the Grange, Hallwood Park and Windmill Hill areas of Runcorn. A key factor behind this is the development that occurred as part of the New Town Programme.

7.30 In contrast, across the Mersey to the North, the Widnes area of Halton has a considerably lower concentration of social sector housing. The areas of Lugsdale, the town centre, Simms Cross and West Bank in Widnes demonstrate social sector housing levels of 28.5% to 42.8%, and coincides with the vicinity in which the Mersey Gateway Bridge will be positioned. A second area of higher concentration (42.6% to 56.7%) is situated to the North West of Widnes centre, in the areas of Upton and Dutton.

Housing Type Profile

7.31 The breakdown of the stock by type also provides an important aspect of understanding the existing stock profile within the housing market area. Too much of one type of housing can undermine market choice giving those wishing to purchase a lack of options. It is important therefore to understand this balance at a local spatial scale.

Figure 7.6: Housing Profile by House Type in Halton

<table>
<thead>
<tr>
<th></th>
<th>Detached</th>
<th>Semi-Detached</th>
<th>Terraced</th>
<th>Flat/Maisonette</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2001</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Halton</td>
<td>19.2</td>
<td>33.1</td>
<td>37.5</td>
<td>9.9</td>
<td>0.2</td>
</tr>
<tr>
<td>North West</td>
<td>17.8</td>
<td>36.6</td>
<td>31.7</td>
<td>13.8</td>
<td>0.3</td>
</tr>
<tr>
<td>England</td>
<td>22.5</td>
<td>31.6</td>
<td>25.8</td>
<td>19.7</td>
<td>0.4</td>
</tr>
</tbody>
</table>

Source: ONS Census 2001

7.32 The census data indicates that the stock profile in Halton is particularly skewed towards terraced housing, at 37.5% of the total stock. This is significantly above the national rate (25.8%), and also the regional level of 31.7%. There is also a slight over-representation of semi-detached stock within Halton, at 33.1%, when weighed against respective regional and national levels of 36.6% and 31.6%.

7.33 The Borough appears to be poorly represented in terms of available flats/maisonettes, which comprise less than 10% of the total stock in 2001, compared to a higher regional (13.8%) and national (19.7%) volume. There is a similar, albeit less severe, deficiency of detached properties, which account for 19.2% of stock contrasted against national stock levels of 22.5%.
Spatial Concentrations

7.34 Understanding the lower spatial level of distribution of the breakdown of type is important in understanding where concentrations of single type housing exist. The distribution of detached, semi-detached, terraced, apartment, maisonette and flat housing types have been mapped for the Borough and are shown over the following pages.

7.35 As expected from the aforementioned housing type data, the spatial plan (figure 7.7) reveals that detached housing is hugely underrepresented within the majority of the Borough in comparison to areas outside the Borough to the North West, South and East, which form a belt surrounding the central areas of Runcorn and Widnes.

7.36 The data presented in Figure 7.8 indicates that, as expected, semi-detached properties are more strongly represented across the Borough. An area of particular concentration (53.8% to 70.3%) exists within the Halton Brook and Higher Runcorn areas of Runcorn.

7.37 As expected, the percentage of terraced properties is extremely high within the Borough (figure 7.9). Particular overrepresented areas of spatial concentration (70.7% to 88%) exist across South Widnes in its entirety, encompassing the West Bank and Lugsdale areas, extending as far as Simms Cross, Halton View and Appleton situated North of Widnes town centre. An area of similar concentration exists in the North West of Widnes in Upton.

7.38 To the South, in Runcorn, a similar level of concentration is situated in the Palace Fields area (figure 7.9). Lesser, yet significant concentrations (53.2% to 70.7%) cover a band across the West of Runcorn of Weston, Weston Point, Runcorn Hill, Higher Runcorn and Heath. A similar band extends South East across Runcorn from the Halton Brook and Grange areas to Hallwood Park, Brookvale and Murdishaw.

7.39 Figure 7.10 reveals that there is an extremely low concentration (0.7% to 15.5%) of flats, apartments and maisonettes across the majority of the Borough. Only one area, Castlefields in Runcorn exhibited a significant concentration of 45.1% to 59.9% of stock. However, discussion with Halton Borough Council indicates that the percentage of flats on Castlefields will have significantly reduced, since the 2001 Census, due a number of deck access demolitions.
Figure 7.7 Local Concentration of Detached Housing in Halton
Figure 7.8 Local Concentration of Semi-detached Housing in Halton

Source: Census, 2001

Percentage of Semi Detached Properties
Figure 7.9 Local Concentration of Terraced Housing in Halton
Figure 7.10 Local Concentration of Flats, Maisonettes & Apartments

Source: Census, 2001

Percentage of Flats, Maisonettes & Apartments
Drivers behind Stock Change

7.40 This section will analyse the drivers behind stock change within Halton, namely the Right to Buy (RTB) scheme, completions and demolitions. Data will be extracted, and presented, from the Census 2001, DCLG and Halton Borough Council Annual Monitoring Reports.

1. Right to Buy

7.41 It is well documented that the amount of social stock nationally has fallen over the last ten years. This has been driven in part by government policies including the RTB program introduced in the early 1980s by the Conservative Government.

7.42 In line with the national trend, Halton has experienced a fall in social stock over the same period. In fact, between 2002 and 2006, the number of social dwellings decreased from 15,555 to 14,101\(^{31}\).

7.43 The 2001 Census allows for a cross tabulation of tenure with type. The graph below indicates this breakdown for Halton.

![Figure 7.11: Social Rented Property by Type](image)

Source: Census, 2001

7.44 The data suggests that there is considerable variance within the stock type profile of the social sector in Halton. In particular, the sector appears highly skewed towards terraced housing, whilst very little of the sector comprises of detached residences. This stock profile is not uncommon within the social sector, due to a prominent trend which has witnessed few larger

\(^{31}\) HSSA 2007
properties being built by local authorities and the majority of those subsequently being purchased through the Right to Buy Programme.

7.45 As noted earlier in this section the impact of people undertaking Right to Buy (RTB) on their Council House has had a marked impact on the quantity of social sector housing. Households also have a tendency to buy the larger family units rather than flats which is likely to have impacted on the stock profile identified above.

7.46 Using data collected by the DCLG it is possible to track the level of RTB in the Borough over recent years. This is demonstrated in the following graph\(^{32}\).

**Figure 7.12: Right to Buy Sales in Halton**

![Graph showing Right to Buy sales from 1998 to 2006.](image)

*Source: DCLG, 2007*

7.47 The graph demonstrates an upwards trend in RTB from 1999 to a peak in 2003/04. Levels then subsequently drop away for the remaining two years. By 2004/05 Halton had transferred all its stock. This indicates that RTB has been an important driving element in the reduction of the social housing stock throughout recent years.

2. Housing Completions

7.48 The following table presents the gross dwelling completions within Halton, as well as the division between greenfield and brownfield development, for the past ten years.

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\(^{32}\) Additional data from Halton BC indicates a RTB level in 2004/05 of 220 which supports general trend of reduced levels following 2003/04
Figure 7.13: Housing Completions in Halton: May 1996 - May 2007

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1996/97</td>
<td>475</td>
<td>513</td>
<td>425</td>
<td>88</td>
</tr>
<tr>
<td>1997/98</td>
<td>752</td>
<td>752</td>
<td>580</td>
<td>172</td>
</tr>
<tr>
<td>1998/99</td>
<td>480</td>
<td>492</td>
<td>455</td>
<td>37</td>
</tr>
<tr>
<td>1999/00</td>
<td>343</td>
<td>410</td>
<td>276</td>
<td>134</td>
</tr>
<tr>
<td>2000/01</td>
<td>188</td>
<td>255</td>
<td>155</td>
<td>100</td>
</tr>
<tr>
<td>2001/02</td>
<td>239</td>
<td>259</td>
<td>187</td>
<td>72</td>
</tr>
<tr>
<td>2002/03</td>
<td>390</td>
<td>588</td>
<td>301</td>
<td>287</td>
</tr>
<tr>
<td>2003/04</td>
<td>177</td>
<td>616</td>
<td>359</td>
<td>257</td>
</tr>
<tr>
<td>2004/05</td>
<td>405</td>
<td>613</td>
<td>202</td>
<td>311</td>
</tr>
<tr>
<td>2005/06</td>
<td>741</td>
<td>744</td>
<td>402</td>
<td>542</td>
</tr>
<tr>
<td>2006/07</td>
<td>419</td>
<td>562</td>
<td>70</td>
<td>492</td>
</tr>
<tr>
<td>Total</td>
<td>4609</td>
<td>5704</td>
<td>3412</td>
<td>2292</td>
</tr>
</tbody>
</table>

Total as %: 59.81% 40.19%


7.49 This data incorporates net dwelling gain, thus importantly accounting for demolitions and conversions.

7.50 It suggests that, in terms of gross gain, the Local Authority has been building at a level over and above the prescribed numbers in the draft RSS for the majority of the previous decade. Over this period the Borough witnessed a gross dwelling gain of 5,704. In particular, annual completion rates have remained strong against draft RSS and RPG 13 requirements since 2002/03, holding steady above the 500 mark.

7.51 Nevertheless, when demolitions and conversions are accounted for, within the net gain statistics, it is apparent that the Borough has not been performing so well against the prescribed targets. In fact, the draft RSS target was only met once, in 2005/06 (+741) although the RPG 13 requirement (+330) was met during eight of the last ten years. Between 2000/01 and 2004/05 1,386 net dwellings were completed, representing an undersupply of 251 dwellings.

7.52 However, between 2006 and 2016, 5,785 dwellings are forecast compared to an increased draft RSS requirement of 8,000. This represents a significant undersupply of 2,235 dwellings. This indicates that the Local Authority must significantly increase its annual dwelling completion rates to meet with regional prescriptions.
Characteristics of Housing Completions

7.53 The percentage of homes built on previously developed land in Halton during 2005/07 is 87%. (582 completions). This is above the recommended target of 65% outlined in regional planning guidance, and by the RSS EIP Panel Report. This rise in the Borough is a substantial increase from 2004/05, and 2005/06 during which time the percentages were 61%\(^3\) and 46.2% respectively\(^4\).

7.54 Analysis of the characteristics of dwelling completions, over the several years in Halton, indicates a substantial skewing towards private accommodation; representing 81.6% of the total completion figure. This is represented in the following summary.

Figure 7.14: Dwelling Completions in Halton – 2005 - 2007

<table>
<thead>
<tr>
<th>Dwelling Completions by Bedroom &amp; Type 2005/07</th>
<th>Private Housing</th>
<th>Housing Associations</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Whole houses or bungalows)</td>
<td>2005/06</td>
<td>2006/07</td>
</tr>
<tr>
<td>1 bedroom</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2 bedrooms</td>
<td>27</td>
<td>11</td>
</tr>
<tr>
<td>3 bedrooms</td>
<td>203</td>
<td>133</td>
</tr>
<tr>
<td>4+ bedrooms</td>
<td>170</td>
<td>69</td>
</tr>
<tr>
<td>Total</td>
<td>400</td>
<td>213</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Dwelling Completions by Bedroom &amp; Type 2005/07</th>
<th>Private Housing</th>
<th>Housing Associations</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Maisonettes or Apartments)</td>
<td>2005/06</td>
<td>2006/07</td>
</tr>
<tr>
<td>1 bedroom</td>
<td>35</td>
<td>67</td>
</tr>
<tr>
<td>2 bedrooms</td>
<td>281</td>
<td>200</td>
</tr>
<tr>
<td>3 bedrooms</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>4+ bedrooms</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>316</td>
<td>267</td>
</tr>
</tbody>
</table>


7.55 This bias extends to a concentration of development upon three (25.7%) and four (18.3%) bedroom private sector houses/bungalows. Little development was aimed at one (0%) and two (2.6%) bedroom private houses/bungalows. As such, this indicates towards encouraged development for family accommodation in the Borough.

\(^3\) Halton Borough Council Annual Monitoring Report 2004/05
\(^4\) Halton Borough Council Annual Monitoring Report 2005/06
7.56 A large volume of completions were private maisonettes/apartments, representing 44.6%, with a majority being two bedrooms (36.8%). Conversely, there were no completions of 3 and 4 bedroom private maisonettes or apartments.

7.57 The following are examples of recent development within the Borough:

- Chapel Gate, Ditton Road, Widnes: This new development of one bedroom apartments, and two, three and four bedroom terraced, apartment style homes has been produced by Redrow. Asking prices range from £99,990 to £105,990 for a one bedroom house and from £111,950 to £117,950 for a two bedroom house.

- Sunningdale Park, Halebank, Widnes: This new development is located approximately two miles from the centre of Widnes and comprises of one, two and three bedroom apartments and houses produced by Bovis Homes. Prices range from £95,900 to £163,500 for houses, with one bed apartments available from £89,050 and two bed apartments from £106,000.

7.58 In the social sector, housing association development of houses/bungalows is biased towards smaller accommodation, with the dominant sizes being one and two bedrooms, although still only representing 3.7% and 3.2% of total completions respectively.

7.59 Development of social sector maisonettes/apartments is focused upon 3 bedroom apartments alone, representing 6% of total completions, with no 1, 2 or 4 bedroom maisonettes/apartments built over this period.

**Housing Demolitions**

7.60 Demolitions can have a significant impact on stock change and, as a consequence, on targets set for dwelling gains within Halton’s UDP and the draft RSS.

7.61 In total there were 142 demolitions in the Borough in 2006/07, which represents a significant increase in the 2005/06 total of 0.35. Of these 141 demolitions were within the Castlefields ward, on De Lacey Row/Fitswilliam Walk (94) and The Butts (47), and 86 Moughland Lane in the Heath ward.

7.62 Once demolitions are taken into account, the net dwelling gain within the Borough was 419 over the period 2006/07.

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Halton Borough Council Housing Baseline Report 2007
Quality of Housing Stock

7.63 The 2006 HSSA returns identify 816 unfit dwellings in Halton, representing 1.5% of the total housing stock. This represents an improvement on the previous year for, in 2005, 1.6% of dwellings were deemed unfit, which is substantially less than the respective regional and national totals of 6% and 5.1%.

Social Housing Quality

7.64 Halton Borough Council transferred all housing stock (6000+) across to Halton Housing Trust (HHT), a newly formed RSL, in December 2005 after the majority of tenants voted in favour of such a transfer. This repealed all direct management responsibilities for housing from the Council.

7.65 At present Halton Housing Trust is the leading RSL in Halton, with 6301 properties, although it is worth noting that there are several other RSL’s operating in the Borough, albeit with lower property numbers:

- Riverside Housing Association Limited owns 2618 properties.
- Liverpool Housing Trust Limited owns 2541 properties.36

7.66 The latest available data that supplies analysis of the social housing stock conditions in the Mersey Gateway regeneration strategy area has been provided through a formal consultation meeting with the Policy Officer of the dominant HHT RSL.

7.67 The RSL was particularly concerned with the quality of social stock within the Borough, and as a result have subsequently developed a 5-year investment strategy, starting from April 2006, targeting financial outlay at the social stock in their possession.

HHT Social Housing Investment

7.68 The investment programme is phased across the period up to 2011 and sub-divided into three investment categories. Each category will be timed to ensure that upgrades are simultaneous. The phases are as follows:

1. **Internal refurbishment** - Up to three elements will receive funding subject to inspection and perceived requirement. These are rewiring, a new kitchen and a new bathroom.

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36 Housing Corporation Website (2007) (http://www.housingcorp.gov.uk/server/show/ConLA.75)
2. External refurbishment: Includes roofs, gutters, rendering, painting, paths and fencing and, as above, is subject to inspection.

3. Windows: New secure double-glazed UPVC units will be provided for all dwelling stock, with the addition of a high security door.

Investment in Mersey Gateway Impact Areas

7.69 The Halton Housing Trust investment programme will impact on several key sites highlighted as Impact Areas for the Mersey Gateway regeneration strategy.

7.70 The first, the West Bank in South Widnes, will receive the first phase of investment in stock from November 2007. The area will initially receive internal upgrades to approximately 160 properties on the following residential roads:

- Terrace Road, Alice Court, Beaumont Street, Oakland Street, Bridge View Close, Lower Church Street, Mersey Road and Wilkinson Close.

7.71 Following completion of the first investment phase, the West Bank is expected to undergo redevelopment of externals in 2010 and installation of windows in 2011.

7.72 Investment in the Old Town area of Runcorn, a second Mersey Gateway regeneration strategy Impact Area, is scheduled to proceed over the same timescale where social housing is under the possession of HHT.

7.73 However, the phasing will be different for external upgrades will be proceeding first, with internal investment from 2010 and window replacement in 2011.

7.74 Hence, such large scale, long-term and comprehensive investment will provide a significant step-change in the quality of social stock within the Borough, and particularly in the aforementioned Mersey Gateway impact areas.

7.75 The following section will turn to analyse the quality of private housing in the Borough.

Private Housing Quality

7.76 The latest data available that provides analysis of private sector housing stock conditions is the Halton Private Sector House Condition Survey (HCS) — Final Report (February 2003)
commissioned by Halton Borough Council and produced by Managed Services and Consultancy Ltd\textsuperscript{37}.

\textit{Age Profile}

7.77 The HCS (2003) highlighted that the Borough had a particularly high level of newer post-1984 stock (53\%) when compared to the national average of 37\%. 15\% of stock was completed during the period 1945-1984, compared to a national average of 21\%, and 32\% of stock was built prior to 1944, which is significantly lower than the national average of 43\%.

\textit{Unfit Dwellings}

7.78 As previously noted, the total percentage of unfit dwellings in Halton was 1.5\%, as of 2006. This section will utilise the HCS (2003) to in an attempt to evaluate the level of unfitness existing in the private housing stock.

7.79 In 2003 the HCS indicated that 2.46\% of the private sector stock was unfit, with a further 8\% categorised as ‘borderline unfit’. As expected the majority of stock situated within the aforementioned categories originated from older dwelling stock, completed prior to 1919 (1.14\%), and between 1919 and 1944 (0.89\%). These sectors combined equated to 13.3\% of all dwellings in the age groups and 82.6\% of total unfit property.

7.80 Divided geographically Widnes was found to have the higher proportion of unfit dwellings (470) amounting to 58\% in total. Correspondingly, Runcorn contained 42\% of total unfit dwellings, or 344 in number.

7.81 The main reasons cited for unfitness within dwellings were as follows:

- Disrepair (46\%)
- Kitchen (29\%)
- Bathroom (28\%)
- Sanitation (25\%)
- Heating (18\%)

7.82 The following sub-section will assess cost estimates for remedying said unfit dwellings.

\textit{Costs}

\textsuperscript{37} It is important to note that, due to the HCS being almost five years old, there is scope for the condition of housing to have altered within the Borough within this period of time.
7.83 The HCS (2003) highlighted the costs of bringing unfit dwelling stock up to acceptable standards for the next thirty years.

7.84 The total estimated cost to remedy unfitness and achieve a 30 year standard for stock was £9,005,374, equating to an average cost of £11,063 per dwelling. To bring all 'borderline unfit' dwellings to the same standard was estimated at a cost of £29,520,663, at an average cost of £10,873, in the HCS (2003).

Key Messages:

7.85 This sub-section summarises the key messages from the findings above:

- Halton has a significantly higher proportion of post-1964 stock than the national average, and also a higher proportion of private sector terraced type dwellings.

- There is a strong association between advancing dwelling age and the costs of repair. The most frequently unfit dwelling types were found to be semi-detached and terrace, reflecting their prominence in the Borough.

- The number of unfit private sector dwellings in 2003 (2.5%) was significantly below the national average calculated at 7%\textsuperscript{30}. The Widnes area had a larger problem with unfitness than Runcorn.

Occupancy

7.86 The levels of occupancy and, correspondingly, vacancy are the key indicator for ascertaining demand for stock, and the quality of such stock, within a given locale. Hence, this section will gauge market demand within Halton utilising HSSA data.

7.87 In terms of occupancy, there were 1,712 vacant dwellings within the Borough as of 1\textsuperscript{st} April 2006. This equates to a vacancy rate of 3.2%. The level of vacant properties is considered a key indicator of a housing market that is falling.

7.88 The table below compares vacancy levels with the North West region and England. The level of vacant properties in Halton in 2006 is below the regional benchmark (for 2005) in both the social and private sectors. Similarly, the level of social sector vacancy in Halton is below the national benchmark, yet the private sector has a higher vacancy rate.

\textsuperscript{30}Halton Private Sector House Condition Survey (HCS) – Final Report (February 2003) commissioned by Halton Borough Council and produced by Managed Services and Consultancy Ltd.
7.89 Despite a level of vacancy being considered sustainable in order to support 'churn' in the market (typically 2.5% - 3%), the data clearly indicates substantial vacancy in the North West (4.47%) and intrinsically with the Halton private market, at 3.9%.

Figure 7.16: Vacancy Levels in Halton - 2006

<table>
<thead>
<tr>
<th></th>
<th>Vacant Dwellings</th>
<th>% Social Sector</th>
<th>% Private Sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Halton (2006)</td>
<td>1,712</td>
<td>1.50%</td>
<td>3.90%</td>
</tr>
<tr>
<td>North West (2006)</td>
<td>128,733</td>
<td>3.27%</td>
<td>4.47%</td>
</tr>
<tr>
<td>England (2006)</td>
<td>680,412</td>
<td>2.20%</td>
<td>3.30%</td>
</tr>
</tbody>
</table>

Source: HSSA, 2006

7.90 Using HSSA data it is possible to identify within the private sector the proportion of vacancy which is long-term. Properties vacant for less than six months can be viewed as being part of the housing market 'churn', however those considered long-term can often fall into disrepair therefore impacting on the surrounding neighbourhood and the wider housing market.

7.91 It is important to note that the properties indicated as vacant for more than six months do not include properties vacant for more than 6 months as a result of an agreement with a private developer or partner to set these aside (to be demolished) for regeneration or housing scheme purposes.

7.92 The data suggests that, of the 1,712 vacant dwellings in Halton as of April 2006, 843 (49.2%) were long-term vacancies lasting longer than six months. As over half of vacant properties are shorter-term vacancies this would suggest demand levels are not critically low.

7.93 As a background the 2001 Census indicated vacancy levels within the Borough of 4.5%, which was slightly higher than across the wider North West (4.4%) and significantly higher than the national vacancy level of 3.3%.

7.94 The following spatial plan highlights levels of vacancy across the Borough, utilising ONS data from the Census 2001.

7.95 The spatial plan (figure 7.16) indicates the highest levels of vacancy (8.5% to 11.3%) in the Astmoor and Castiefields areas of Runcorn, which is significantly above the aforementioned regional and national averages. The Old Town, Weston and Westen Point areas of Runcorn also exhibit levels of vacancy (5.7% to 8.5%) elevated above the regional and national levels.

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59 It is, however, important to note that 2001 Census data will include all vacant property, including that planned for demolition, whereas data taken from HSSA does not. Resultantly, HSSA data should be viewed as a more conservative calculation.
averages. This high level is mirrored within South, and central, Widnes areas of Riverside (West Bank), Lugsdale, Simms Cross and Kingsway.
Figure 7.16 Spatial Distribution of Vacancy Levels in Halton – 2001 Census Analysis

Source: Census, 2001

Percentage of Vacant Properties
Future Supply

7.96 This section establishes the supply side situation for housing within the housing market area. A brief examination is undertaken into Halton’s previous completion levels against the levels set by the draft RSS (2006), as well as projected future levels of building based on the figures recorded within annual monitoring reports.

7.97 Analysis is also undertaken of pipeline development and the availability of land within the housing market area. Both these factors are very important in understanding the constraints placed upon future policy attempts to influence the quantity and location of housing development.

Housing Requirements

7.98 Under the old RPG 13 (still the adopted regional planning guidance) the authorities within the North West were allocated an annual average rate of housing provision net of clearance.

7.99 The Draft RSS produced in 2006, having recently undergone an Examination in Public (EIP), establishes new housing requirements for each authority. This document proposes a higher level of development within Halton, from the 330 dwellings required under RPG 13, to 500 new dwelling completions per annum.

Characteristics of Housing Pipeline

7.100 As part of the evidence base for the Draft RSS authorities were asked to supply information regarding the level of outstanding planning permissions, this was recorded as at 31st March 2004. The MPU updated this data in January 2007 and the table below reflects the data from both these sources.

Figure 7.17: Summary of Outstanding Planning Permission Supply:

<table>
<thead>
<tr>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Green field</td>
<td>Brown field</td>
<td>Total</td>
</tr>
<tr>
<td>Halton</td>
<td>4001</td>
<td>1183</td>
<td>5184</td>
</tr>
<tr>
<td></td>
<td>3458</td>
<td>1705</td>
<td>5163</td>
</tr>
</tbody>
</table>

Source: Halton Borough Council

7.101 Halton has very high levels of extant planning permissions placed across the period, representing a significant number of years supply based on the current housing requirements.
7.102 These high levels of extant planning permissions have an impact on the ability of policy to influence current situations, as a time lag exists before any policy will witness prescribed change based on this existing supply situation.

*Land Availability*

7.103 The final element of understanding the potential housing supply situation is the availability of land for housing within the local authority. A lack of available land for housing development is a major constraint in terms of the contribution of future supply, both in overall figures and with regard to spatial distribution.

7.104 Halton Borough Council has provided information indicating the position as at May 2007. The final figures from Council monitoring are shown in the following table.

**Figure 7.18: Land Supply in Halton – May 2007**

<table>
<thead>
<tr>
<th></th>
<th>Housing Supply (dwellings) in Halton - May 2007</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total Capacity</td>
</tr>
<tr>
<td>Widnes</td>
<td>1,900</td>
</tr>
<tr>
<td>Runcorn</td>
<td>3,578</td>
</tr>
<tr>
<td>Halton Total</td>
<td>5,478</td>
</tr>
</tbody>
</table>

*Source: Halton Borough Council – Housing Monitoring Report 2007*

7.105 This data is map geographically on the following spatial plan (figure 7.19).

7.106 The data suggests that there is sufficient supply capacity within the Borough to meet the requirements of the draft RSS for 500 dwellings per annum until 2016. At this rate of development Halton has enough available land for ten years supply on 163 ha of obtainable land.

7.107 It appears that land is more constrained within Widnes, which has 29.5% of the available land supply, when weighed against availability in Runcorn, which equates to 70.5% or 109.4 ha of supply.
Figure 7.19 Land Supply in Halton – May 2007

Source: Halton Borough Council, 2007

Land Availability 2006-2007

GVA Grimley

Halton Borough Council (5/06/07)
The Housing Market

National and Wider Market in Context

Relative House Prices

7.108 House prices are indicative of the relationship between supply and demand for different housing products and reflect the attractiveness of a particular location to potential purchasers.

7.109 Recent years have witnessed significant and consistent upwards trends in house prices across the nation. The North West has paralleled national trends, and indeed towards the end of 2005 the annual rate of house price inflation within the region was well above the UK average\(^6\). However, Halifax’s second quarter report for 2007 suggests that the annual rate of house price inflation in the region (8.9%) is significantly trailing the UK average of 10.7%.

7.110 The same summary reports that house prices in the North West increased by 0.7% in the second quarter of 2007, compared to the UK average increase of 2%. Accordingly, the Halifax Price Index indicates that the average house price in the North West is currently £152,510, which is 22.4% below the national UK average of £196,525.

7.111 The Halifax second quarter report for 2007 contains some interesting summary information for the Halton area in question:

- The average house price in Runcorn rose from £132,767 in June 2006, to £137,472 in June 2007, representing a 4% increase over the year.
- Conversely, the average price of a house in Widnes fell by -3%, during the same period, from £147,531 to £143,682.

7.112 At the scale of the Liverpool City Region, it appears that areas of industrial/post industrial environmental degradation directly coincide with lower price ranges – e.g. the North Docks/Atlantic Avenue SIA, Birkenhead Docks, Eastern Approaches SIA, Speke-Garston SIA, Ellesmere Port, West Runcorn, Northwich, Winsford, South Widnes, parts of St. Helens and the A57/A58/A580 corridor.

7.113 Land Registry provides a more detailed breakdown of house prices for the Borough of Halton. As previously noted the housing market has experienced remarkable buoyancy in recent years. This is demonstrated in the following graph.

\(^6\) Halifax House Price Index Third Quarter 2005 – The annual rate of house price growth in the North West is 9.1% considerably higher than the UK average of 3.0%
Figure 7.20: Average House Prices in Halton 1996 – 2007(Q1)

Source: Land Registry, 2007

7.114 Halton has clearly experienced a significant level of growth, particularly since 2002. Significantly, values within the Borough have remained marginally below the regional average, and considerably under perform in comparison to the national average house price. In fact, the gap between Halton and the national average growth value appears to have widened significantly over the past decade, particularly since 1999.

7.115 The following chart will display an indexed breakdown of the average house price data displayed above to gain a clearer image of comparative change between Halton, the region, and the nation since 1996.
Figure 7.21: Indexed Average House Prices in Halton 1996 – 2007(Q1)

Indexed Average House Prices 1996-2007

Source: Land Registry, 2007

7.116 The indexed data highlights that, since 1999, Halton has underperformed against the national average in terms of value growth. Nevertheless, closer inspection reveals Halton has remained relatively consistent with fluctuating regional value growth until 2006, when it fell sharply indicating a decrease in value and has remained below the regional average into 2007.

The Local Housing Market

7.117 The following spatial plan (figure 7.22) shows mapped Land Registry price data at four digit postcode level for Halton. This indicates average overall house prices for the period January 2004 – December 2006 in the Borough.

7.118 The following key points of analysis can be extracted from the plans:

- Average property values within the Mersey Gateway regeneration area of the Borough, in the North of Runcorn and South Widnes, are particularly low; with property across the entire area worth only £91,000 - £147,000.
- The Mersey Gateway clearly suffers from a depressed housing market when viewed relatively in comparison to neighbouring areas visible on the spatial plan.
Figure 7.22 Average House Prices in Halton – All Property Types (2006)
7.119 The following spatial plan (Figure 7.23) reinforces the observation that average prices are particularly low in Halton compared to surrounding areas. As highlighted previously, there is a preponderance of terraced, lower value, housing within the Borough – yet clearly the value of terraces increases towards the outskirts of Halton and beyond. This suggests that the core of the Borough suffers from a depressed market when comparing the dominant housing type.
Figure 7.23 Average House Prices in Halton – Terraces (2006)
**Affordability**

7.120 This segment will firstly provide analysis of the housing needs within Halton, before summarising levels of affordability within the Borough.

7.121 This section summarises the results of the **Halton Housing Needs Study** (2006). Due to its recent production, it can be taken as a fairly robust analytical source:

- 84.5% of respondents to the household survey said their home was adequate for their needs; 15.5% said their home was inadequate. Levels of adequacy are much lower in the private rented sector and in the former Council stock.

- The property type profile in Halton is skewed towards terraced and semi-detached houses. The stock of flats is low and the majority are in the social housing sector.

- Under-occupation affects approximately 38.1% of all households and over-occupation affects 2.8% of all existing households - below the national average of 3%.

- Demand from existing moving households focused on detached (41.4%) and semi-detached (39.4%) houses. 79.5% of demand was for 3 or 4 bed accommodation.

- The private rented sector is very small at 4.1% and has generally low quality standards. It is the housing preference of only 1.4% of existing and 0.9% of concealed households.

- A projected significant increase in the elderly population was forecast along with a high level (31%) of households containing someone with a special need. The Survey identified a need over the next three years for 103 units of independent accommodation with a visiting support worker, and 29 units of independent accommodation with a live in carer.

- The property type profile in Halton is fairly varied and as such meets the needs of a wide range of population groups but with a low level of flats and a high level of terraced properties.

- The survey identified an emerging affordability issue in the Borough with a need for an additional 176 affordable units per annum, this represents a significant change from the previous survey which did not identify an affordable need.

- In total, the data suggests a combined requirement of 748 units of sheltered accommodation, 435 in the affordable sector and 313 in the private market.

7.122 The Council are currently planning to develop an Affordability Supplementary Planning Guidance (SPD) document, in which, the response to the requirements outlined in the Needs Study (2008) will be presented.
Affordable Supply

7.123 HSSA forms provide an indication of the supply side attempts to relieve this issue within the northern housing market area with authorities indicating the number of affordable units constructed each year. This is demonstrated in the graph below.

Figure 7.24: Supply of Affordable Housing 2002-08

Source: HSSA

7.124 This indicates that, despite the Borough continuing to produce a steady supply of affordable units, completions have dropped sharply from 2004/05, yet are predicted to rise again towards 2008. A significant factor behind this fall in provision is that the majority of affordable housing provision is being delivered at Castlefields, where greater numbers of social housing are being demolished.

7.125 The analysis identifies areas in which the current housing market is likely to preclude households from purchasing a house, this is driven by two factors, house prices and income levels. Types of households affected include:

- First Time Buyers (FTB), and
- Low income households, including those looking to move out of the social rented sector

7.126 It is important to note that these households play a critical role in ensuring the continuity of the housing market. If households are unable to buy entry level properties other elements of the

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41 2006/07 and 2007/08 data is planned / predicted from HSSA 2007.
42 A significant proportion of this projected supply is focused in the Castlefields area, which is an area of targeted demolition of social stock as part of a wider programme.
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Figure 7.24: Supply of Affordable Housing 2002-08\textsuperscript{41}

![Graph showing affordable housing out-turn in Halton 2002-2008]

Source: HSSA

7.124 This indicates that, despite the Borough continuing to produce a steady supply of affordable units, completions have dropped sharply from 2004/05, yet are predicted to rise again towards 2006\textsuperscript{42}. A significant factor behind this fall in provision is that the majority of affordable housing provision is being delivered at Castlefields, where greater numbers of social housing are being demolished.

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![Affordable Housing Out-turn In Halton 2002-2008](chart)

Source: HSSA

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\(^{41}\) 2006/07 and 2007/08 data is planned / predicted from HSSA 2007.

\(^{42}\) A significant proportion of this projected supply is focused in the Castlefields area, which is an area of targeted demolition of social stock as part of a wider programme.
'housing chain' cannot operate smoothly therefore impacting on all components of the housing market.

7.127 The analysis undertaken does not aim to quantify need in terms of the number of households requiring affordable housing.

7.128 An initial assessment is made of the spatial patterns of household incomes across Halton. Following this examination is made of the affordability issues within Halton using ratios based on household income and house prices.

*Income Measurement*

7.129 Firstly, simply examining income in isolation provides an indication of the location of households which are classed as low income. The threshold generally adopted to define low income is 60% of median equivalised disposable income. The following plan (figure 7.25) indicates areas which have median incomes which are 60% or below the English average, this does not include a discounting of housing costs from the income levels. The average median income for England calculated by CACI is £32,819.97.

7.130 The plan also illustrates areas of acute low income, where household income is less than 45% of the England average.

7.131 The plan shows that there is a concentration of low income households within the Runcom Old Town, Grange, Castlefields and Halton Brook areas of Runcorn. In addition there are pockets of low-income within areas of the West Bank in Widnes.

7.132 Analysis on Census 2001 data indicates that low income within the Mersey Gateway area is combined with a high level of unemployment (4.5%) compared to regional (3.6%) and national (3.4%) averages. This, when taking into account the high level of key benefit claimants in Halton (22%), compared to regional (18%) and national averages (14%), suggests that the demographic profile of the Borough has become skewed towards benefit dependency. Thus, benefits appear to be supporting the income levels within the aforementioned areas of Halton.

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43 Office of National Statistics, 2007
Figure 7.25 Low Income Earners (<60% Average Income for England)
Key Conclusions from Housing Analysis

- In terms of the current stock, there is a high proportion of social housing sector property in Halton. Furthermore, the stock type is highly skewed towards terraced housing with detached, family housing and flats/apartments particularly underrepresented. However, recent completions have focused upon balancing this situation. The quality of stock is generally good, with the volume of unfit dwellings significantly below regional and national average levels, and vacancy not at a critically high level. Furthermore, the social housing provider (HHT) is engaging in a significant investment programme to align all properties to Decent Homes standards.

- The Local Authority has been building at a level over and above the prescribed numbers in the draft RSS for the majority of the previous decade. Over this period the Borough witnessed a gross dwelling gain of 5,704. However, between 2000 and 2016, 5,765 dwellings are forecast compared to an increased draft RSS requirement of 8,000. This represents a significant undersupply of 2,235 dwellings. The Local Authority must significantly increase its annual dwelling completion rates to meet with regional prescriptions.

- In supply terms, there is sufficient supply capacity within the Borough to meet the requirements of the draft RSS for 500 dwellings per annum until 2016. At this rate of development Halton has enough available land for ten years supply on 163 ha of obtainable land. Land is more constrained within Widnes, when weighed against availability in Runcorn, which equates to 109.4 ha.

- Housing values within the Borough have fluctuated across the past decade, and currently reside marginally below the regional average, and considerably under perform in comparison to the national average house price growth. The gap between Halton and the national average growth value appears to have widened significantly over the past decade, particularly since 1999. The Borough’s decline in 2006 to values below the regional average could signal signs of a ‘depressed’ housing market, when contrasted against neighbouring areas. An increase in values of terraced stock located towards the outskirts of the Borough provides reinforcement to this assertion.

- Nevertheless, despite the Borough continuing to produce a steady supply of affordable units, completions have dropped sharply from 2004/05.

- Therefore, with higher occupation growth expected in higher values, as well as lower value occupations, the second Mersey crossing will provide a vital link in achieving the economic aspirations of the area, in terms of facilitating commuter linkages, particularly
with constraint in the labour market appearing set to increase. These factors combined highlight the necessity for increased housing stock, in terms of quantity and quality and in both aspirational, and affordable, housing types, within the Mersey Gateway regeneration area of Halton, in order to accommodate the heightened influx of residents from outside Halton and internal growth.
8. PRIORITY REGENERATION AREAS

8.1 Halton is an area that suffers significantly from deprivation, and consequently requires holistic regeneration. The 2004 Index of Deprivation (IMD) ranked Halton as the nation’s 21st most deprived Borough, which places the Borough significantly above neighbouring areas of St. Helens (36th), Wirral (48th) and Sefton (76th).

8.2 The revised 2007 IMD highlights that Halton’s overall position has improved slightly, with its score decreasing from 34.29 to 32.61 and its ranking position subsequently rising to 30th from the 356 LA’s nationally.

8.3 Nevertheless, the Borough remains a significant concentration of deprivation. Furthermore, the associated Concentration of Poverty Index, which is utilised to identify localised hot-spots of deprivation, reported that Halton had increased from 36th in 2000 to the 20th worst authority in England in 2004.

8.4 As a consequence, the Halton Strategic Partnership (LSP) has identified a number of priority regeneration areas within the Borough, which show significant concentrations of deprivation and subsequently require targeted regeneration efforts. These wards have been specified, in the Local Area Agreement for Halton (April 2007 - March 2010) (LAA), as neighbourhoods in which it is vital to ‘close the gap’ between such hotspots of multiple deprivation and the Borough overall. The wards are as follows;

- Castlefields (Runcorn)
- Windmill Hill (Runcorn)
- Halton Lea (Runcorn)
- Grange (Runcorn)
- Riverside (Widnes)
- Kingsway (Widnes)
- Appleton (Widnes)

8.5 It is important to note at this stage that the Riverside ward takes in the West Bank Impact Area within its boundary.

8.6 The Rank of IMD (2007) for Halton is presented on the following spatial plan (figure 8.1), with the boundaries of the priority wards outlined.
Figure 8.1 Rank of IMD (2007) within the Priority Wards of the Mersey Gateway Regeneration Area

Source: IMD, 2007

Index of Multiple Deprivation - Rank of IMD
8.7 The spatial plan clearly exposes large swathes of deprivation with Halton, with concentrations exhibited in the Kingsway, Appleton and Riverside (West Bank and Lugsdale in 5% most deprived) areas of Widnes and Windmill Hill (1% most deprived), Hallwood Park, Castlefields and Halton Lea in Runcorn (5% most deprived). Grange and Halton Lea also exhibit high levels of deprivation, and have areas included in the 10% most deprived areas in England.

8.8 It is possible to breakdown the IMD 2007 data into seven separate sub-domains to develop a more detailed image of the ‘hotspots’, and specific sources of deprivation, within Halton and the Mersey Gateway regeneration area. The sub-domains are as follows:

- Crime & Disorder
- Education
- Employment
- Health
- Housing
- Income
- Local Living Environment.

8.9 This section will subsequently progress to analyse the aforementioned sub-domains for the Mersey Gateway regeneration area within Halton.

8.10 The following spatial plan (figure 8.2) indicates the geographical rank of areas within the Borough for incidence of crime and disorder.

8.11 The data highlights that the Appleton ward is ranked within the 5% most deprived wards in England and Wales in terms of occurrence of crime and disorder. Neighbouring Kingsway also experiences a high level — situated within the 10% most deprived wards nationally.

8.12 There also appears to be a concentration of high levels of crime and disorder in the centre of the Borough, with areas of the wards of Grange, Windmill Hill and Castlefields all situated within the 10% most deprived wards nationally.

8.13 To summarise, all priority wards outlined within the Mersey Gateway area exhibit high levels of deprivation in terms of crime and disorder, for all fell totally or partially within the 30% most deprived wards nationally.
8.14 Figure 8.3 progresses to indicate the geographical deprivation rank of priority wards within the Borough for the education sub-domain.
Figure 8.2  Rank of Crime & Disorder from IMD (2007) within the Priority Wards of the Mersey Gateway Regeneration Area

Source: IMD, 2007

Index of Multiple Deprivation • Rank of Crime & Disorder
Figure 8.3  Rank of Education from IMD (2007) within the Priority Wards of the Mersey Gateway Regeneration Area
8.15 The plan highlights that, in terms of education, skills and training deprivation, all priority wards exhibit a high level of deprivation compared to the national average. Kingsway demonstrates the highest levels of deprivation; positioned within the 5% most deprived wards nationally.

8.16 Appleton, Riverside, Castlefields, Windmill Hill, Grange and Halton Lea all have considerable areas that are within the 10% highest ranked wards, indicating the severity of the problem in these areas.

8.17 The following spatial plan (figure 8.4) proceeds to indicate the geographical deprivation rank of priority wards within the Borough for the employment sub-domain.

8.18 Figure 8.4 highlights that the majority of Castlefields and the southern area of Windmill Hill exhibit extremely high levels of employment deprivation and are situated within the 5% most deprived wards nationally for this sub-domain.

8.19 The other priority wards in the Mersey Gateway regeneration area also demonstrate high levels of deprivation in this sub-domain. Riverside, Kingsway, Halton Lea, Appleton and areas of the Grange ward are situated within the 10% most deprived wards nationally. Remaining areas of Riverside and Grange are positioned within the 20% and 30% most deprived wards nationally, indicating the depth of the employment problem within the Mersey Gateway area.

8.20 Figure 8.5 proceeds to indicate the geographical deprivation rank of priority wards within the Borough for the sub-domain of health.

8.21 This spatial plan highlights that health is particularly poor within the Mersey Gateway regeneration area. The areas exhibiting the highest levels of deprivation are Halton Lea, Windmill Hill, Castlefields and the southern area of the Kingsway ward. Each of the aforementioned wards features in the 5% most deprived wards at a national scale.

8.22 Riverside, Grange, Appleton and the northern area of Kingsway also demonstrate a poor level of health, each being within the 10% most deprived wards nationally.

8.23 The scale of the health problem is evident in the Mersey Gateway area, with all priority wards ranking within the 20% most deprived wards in England and Wales.

8.24 The subsequent spatial plan (figure 8.6) proceeds to indicate the geographical deprivation rank of priority wards within the Borough for the sub-domain of housing.
Figure 8.4 Rank of Employment from IMD (2007) within the Priority Wards of the Mersey Gateway Regeneration Area
Figure 8.5  Rank of Health from IMD (2007) within the Priority Wards of the Mersey Gateway Regeneration Area

Source: IMD, 2007

Index of Multiple Deprivation - Rank of Health
Figure 8.6  Rank of Housing from IMD (2007) within the Priority Wards of the Mersey Gateway Regeneration Area

Source: IMD, 2007

Index of Multiple Deprivation - Rank of Barriers to Housing & Services
8.25  Figure 8.6 demonstrates that the Mersey Gateway regeneration area does not exhibit the same high levels of deprivation in housing terms, when compared to the aforementioned sub-domains.

8.26  Nevertheless, some significant levels of deprivation were indicated on the plan, particularly in the south of the Borough, within Halton Lea, which exhibited levels of housing deprivation within the 20% and 30% highest ranked wards nationally respectively.

8.27  The subsequent spatial plan (figure 8.7) proceeds to indicate the geographical deprivation rank of priority wards within the Borough for the sub-domain of income.

8.28  Figure 8.7 underscores the high levels of income deprivation within the Mersey Gateway regeneration area. Of particular significance are the Windmill Hill ward and the southern area of Kingsway which, at having extremely low income levels, are situated within the 1% most deprived wards in England and Wales.

8.29  Several of the priority wards are situated within the 5% most deprived wards in the country. These being: Castlefields, Halton Lea and the northern area of Windmill Hill. The remaining areas of Halton Lea, Appleton and Kingsway are ranked within the 10% most income deprived wards nationally.

8.30  The Grange ward also demonstrates high deprivation, to a lesser degree, and is ranked in its majority, within the 20% most deprived wards nationally.

8.31  The following spatial plan (figure 8.8) proceeds to indicate the geographical deprivation rank of priority wards within the Borough for the final IMD (2007) sub-domain of living environment.
Figure 8.7 Rank of Income from IMD (2007) within the Priority Wards of the Mersey Gateway Regeneration Area

Source: IMD, 2007
Figure 8.8  Rank of Living Environment from IMD (2007) within the Priority Wards of the Mersey Gateway Regeneration Area

Source: IMD, 2007
8.32 The spatial plan above (figure 8.6) indicates that the priority wards located in Widnes have a higher intensity of living environment deprivation, at a general level, than the priority wards in Runcorn. Only part of the priority ward of Appleton was ranked within the top 5% of deprived wards nationally.

8.33 Nevertheless, the southern areas of Kingsway and Appleton were both ranked within the 10% most deprived wards nationally.

8.34 Several areas were positioned within the 30% most deprived wards nationally; namely Riverside ward, the northern area of Appleton and the southern vicinity of Kingsway.

8.35 Hence, by recognising the high levels of deprivation within priority wards, the Local Area Agreement for Halton (April 2007 - March 2010) strategy places high precedence on obtaining a healthier community, transformational urban renewal and increased economic prosperity through investment in employment, education and skills development.

8.36 This approach focuses upon promoting enterprise, increasing connectivity to employment, liveability, addressing basic skills gaps and linking necessary urban renewal and investment to local labour markets. This strategy will focus on several broad key targets;

- increasing employment rate;
- decreasing economic activity rate;
- increasing qualifications in adults;
- increasing self employment; and
- increasing VAT registrations.

8.37 Furthermore, an important part of achieving such improvement is to be realised through Halton Borough Council’s inclusion within the Liverpool City Region Employment Strategy which seeks to alleviate worklessness in those areas within the Borough that experience highest levels of unemployment (above 25%). At present the areas identified with greatest need are Windmill Hill, Castlefields, Riverside, Halton Lea, Grange and Kingsway — the priority wards.

8.38 The City Employment Strategy (CES) will attempt to bring together the public, private and voluntary sectors to implement targeted assistance using new Deprived Areas Funding (DAF), which can only be utilised for the benefit of unemployed persons within the aforementioned areas. The DAF will provide investment to engage unemployed persons, provide them with support in finding work and building skills through training and developing specialised
employer forums with local business champions to encourage awareness of the issues and necessity to boost employment in these areas.

8.39 The following section will provide a deeper analysis of each of the priority wards, in order to ascertain the weaknesses and problems inherent within said neighbourhoods, and subsequently provide strategic guidance for their regeneration.

**Priority Ward Analysis**

8.40 This section will draw out the problems in key indicator sectors for the priority wards outlined above. The key indicators will be as follows:

- Health
- Amenities
- Economic Activity
- Occupation
- Education and Qualifications
- Travel to Work

8.41 The data utilised is collated from the national Census 2001, obtained from ONS, the Halton Strategic Partnership’s ‘Halton Observatory’ database and ward level Neighbourhood Renewal Strategy (2003/04) resident consultation documents.

**Health**

8.42 From the extensive consultation performed as part of the Neighbourhood Renewal Strategy in 2003, health was revealed as a major concern for residents living in the priority wards. The majority of residents felt that health was poor in these areas, particularly in Appleton, Kingsway, Riverside, Heath and Grange, due to the air conditions stemming from industrial pollution and contamination.

8.43 The following table presents key health indicators for the priority wards in Halton, alongside regional and national comparators.
Figure 8.9: Health Related Indicators: Priority Wards & Regional / National Comparators

<table>
<thead>
<tr>
<th></th>
<th>Health – Census 2001 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Not Good General Health</td>
</tr>
<tr>
<td>England &amp; Wales</td>
<td>9.0</td>
</tr>
<tr>
<td>North West</td>
<td>11.0</td>
</tr>
<tr>
<td>Halton Wards</td>
<td></td>
</tr>
<tr>
<td>Appleton</td>
<td>13.6</td>
</tr>
<tr>
<td>Castlefields</td>
<td>15.9</td>
</tr>
<tr>
<td>Grange</td>
<td>13.2</td>
</tr>
<tr>
<td>Halton Lea</td>
<td>14.7</td>
</tr>
<tr>
<td>Kingsway</td>
<td>13.0</td>
</tr>
<tr>
<td>Riverside</td>
<td>13.4</td>
</tr>
<tr>
<td>Windmill Hill</td>
<td>17.5</td>
</tr>
</tbody>
</table>

Source: ONS

8.44 The summary above supports the resident’s assertions, indicating that all priority wards within the Mersey Gateway regeneration area experience levels of ‘not good’ general health above both the regional (11%) and national (9%) averages.

8.45 Windmill Hill demonstrates particularly high levels of poor health, with 17.5% of residents exhibiting ‘not good’ general health, which equates to almost double the national average. Castlefields and Halton Lea also demonstrate high levels of poor health, at 15.9 and 14.7% of their total resident population respectively.

8.46 Kingsway has the lowest incidence of poor general health amongst the priority wards, yet, at 13%, still exhibits a lower level of health than the national and regional spatial scales.

8.47 With regards to the percentage of residents, of working age, experiencing long-term limiting illness, again the priority wards indicate a higher incidence that the regional (15.4%) and national averages (13.3%).

8.48 Windmill Hill appears to be an area of high concentration of poor health within the Borough, as this ward also contains the highest percentage of persons with limiting long-term illness (30.3%), which equates to nearly a third of its available workforce. Similarly, Castlefields and Halton Lea appear to hold high levels of ill health, with the second and third highest levels, equating to 26.5% and 23.5% respectively.
8.49 As with 'not good' general health occurrence amongst the priority areas, the Kingsway ward exhibits the lowest percentage of limiting long-term illness. Nevertheless, this remains 5.5% above national, and 2.4% beyond regional, wider spatial averages.

Amenities

8.50 The following table presents key health indicators for the priority wards in Halton, alongside regional and national comparators.

**Figure 8.10: Amenity Related Indicators within Priority Wards & Regional / National Comparators**

<table>
<thead>
<tr>
<th>Amenities per Household (%)</th>
<th>No Car</th>
<th>No Central Heating</th>
</tr>
</thead>
<tbody>
<tr>
<td>England &amp; Wales</td>
<td>26.8</td>
<td>8.5</td>
</tr>
<tr>
<td>North West</td>
<td>30.2</td>
<td>11.8</td>
</tr>
<tr>
<td>Halton Wards</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appleton</td>
<td>42.7</td>
<td>24.7</td>
</tr>
<tr>
<td>Castlefields</td>
<td>45.1</td>
<td>4.9</td>
</tr>
<tr>
<td>Grange</td>
<td>37.3</td>
<td>6.2</td>
</tr>
<tr>
<td>Halton Lea</td>
<td>37.3</td>
<td>1.7</td>
</tr>
<tr>
<td>Kingsway</td>
<td>35.6</td>
<td>18.2</td>
</tr>
<tr>
<td>Riverside</td>
<td>38.1</td>
<td>19.5</td>
</tr>
<tr>
<td>Windmill Hill</td>
<td>48.3</td>
<td>4.3</td>
</tr>
</tbody>
</table>

*Source: ONS*

8.51 As suggested via analysis of health indicators, the analysis of the percentage of households without a car demonstrates Windmill Hill as the priority ward with the lowest amenity level. The summary indicates that almost 50% (48.3%) of households have no car in this area, which is vastly in excess of the national level (26.8%) and the regional average (30.2%).

8.52 All wards have a higher percentage of households without a car, with Castlefields (45.1%) and Appleton (42.7%) joining the aforementioned Windmill Hill as being the areas with lowest automotive amenity levels.

8.53 Four of the seven wards have a higher percentage of homes with central heating than the national (6.5%) and regional (11.8%) averages: Castlefields, Grange, Halton Lea and Windmill Hill. In contrast, Appleton has the highest percentage of homes with no central heating.
heating (24.7%), followed by Riverside and Kingsway wards, with 19.5% and 18.2% respectively.

8.54 In terms of locally accessible amenities, the Neighbourhood Renewal consultation underscored that all wards were in support of physical urban regeneration and renewal, with 72% believing the physical appearance of their area to be very important to quality of life.

8.55 In particular, emphasis was placed on urban regeneration requirements in Castelfields and Windmill Hill where concerns focused upon the declining employment opportunities, high vacancy levels and unattractive aesthetics of Astmoor Industrial Estate. In Halton Lea, Grange and Heath residents expressed concern over the quality and volume of local leisure and shopping facilities and strong support was found for the Mersey Gateway Bridge as a catalyst for local renewal and accelerated reduction in land contamination.

Economic Activity

8.56 The Neighbourhood Renewal consultation highlighted levels of economic activity as a key concern within the priority wards. In Appleton, Kingsway and Riverside 71% of consulted residents felt that there existed a lack of employment opportunities in the Borough for local people. Similarly, in the Grange, Heath, Castelfields, Windmill Hill and Halton Lea wards 68% to 71% of residents believed unemployment to be unsustainably high within the area.

8.57 The following table presents key economic activity indicators for the priority wards in Halton, alongside regional and national comparators.
### Figure 8.11: Economic Activity Related Indicators within Priority Wards & Regional / National Comparators

<table>
<thead>
<tr>
<th></th>
<th>Economically Inactive (unemployed)</th>
<th>Long-term Unemployed</th>
<th>Unemployed Permanently sick/disabled</th>
<th>Unemployed Households with Dependent Children</th>
<th>Never Worked</th>
</tr>
</thead>
<tbody>
<tr>
<td>England &amp; Wales</td>
<td>3.4</td>
<td>30.3</td>
<td>5.3</td>
<td>4.8</td>
<td>2.7</td>
</tr>
<tr>
<td>North West</td>
<td>3.6</td>
<td>31.7</td>
<td>7.8</td>
<td>5.8</td>
<td>3.1</td>
</tr>
<tr>
<td><em>Halton Wards</em></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appleton</td>
<td>21.8</td>
<td>35.3</td>
<td>10.7</td>
<td>6.8</td>
<td>3.3</td>
</tr>
<tr>
<td>Castlefields</td>
<td>7.5</td>
<td>36.5</td>
<td>15.5</td>
<td>9.3</td>
<td>5.2</td>
</tr>
<tr>
<td>Grange</td>
<td>5.5</td>
<td>31.7</td>
<td>11.2</td>
<td>9.5</td>
<td>4.1</td>
</tr>
<tr>
<td>Halton Lea</td>
<td>6.9</td>
<td>35.4</td>
<td>14.8</td>
<td>13.6</td>
<td>5.8</td>
</tr>
<tr>
<td>Kingsway</td>
<td>4.0</td>
<td>31.7</td>
<td>9.9</td>
<td>9.7</td>
<td>3.8</td>
</tr>
<tr>
<td>Riverside</td>
<td>5.8</td>
<td>39.0</td>
<td>12.4</td>
<td>11.2</td>
<td>5.3</td>
</tr>
<tr>
<td>Windmill Hill</td>
<td>8.6</td>
<td>32.2</td>
<td>20.1</td>
<td>21.2</td>
<td>7.3</td>
</tr>
</tbody>
</table>

*Source: ONS*

8.58 The data presented above highlights that all seven priority wards exhibit levels of unemployment, long-term unemployment, permanent illness or disability, unemployment in households with dependents, and residents who have never worked at a higher level than the regional and national averages.

8.59 In terms of unemployment, Appleton has the uppermost level, at 21.8%, compared to the national (3.4%) and regional (3.6%) averages. In fact, this indicates the ward has an unemployment level over six times the national average.

8.60 Of those unemployed, within the priority wards, high percentages are long-term unemployed (6+ months). Riverside, Castlefields, Halton Lea and Appleton have the highest levels, at 39%, 36.5%, 34.4% and 34.3% respectively, and are subsequently in excess of the national (30.3%) and regional (31.7%) average levels.

8.61 A high percentage of unemployed are also permanently sick or disabled. Windmill Hill (20.1%), Castlefields (15.5%) and Halton Lea (14.8%) exhibit the highest levels and are significantly in excess of the North West (7.8%) and national (5.3%) levels.

8.62 Several priority wards demonstrate levels of unemployed households with dependent children, in excess of double the national average (4.8%). These are; Windmill Hill (21.2%), Halton Lea (13.8%), Riverside (11.2%) and Kingsway (9.7%).
The priority wards also exhibit high levels of residents who have never entered employment. Windmill Hill (7.3%) has the highest percentage, followed by Halton Lea (5.8%), Riverside (5.3%) and Castelfields (5.2%), which are significantly above the national and regional averages of 2.7% and 3.1% respectively.

Occupation

The following table presents key occupation indicators for the priority wards in Halton, alongside regional and national comparators.

Figure 8.12: Occupation Related Indicators within Priority Wards & Regional / National Comparators

<table>
<thead>
<tr>
<th></th>
<th>Occupation (%) (Aged 16-74)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Routine Occupations</td>
</tr>
<tr>
<td>England &amp; Wales</td>
<td>9.8</td>
</tr>
<tr>
<td>North West</td>
<td>9.8</td>
</tr>
<tr>
<td>Halton Wards</td>
<td></td>
</tr>
<tr>
<td>Appleton</td>
<td>12.7</td>
</tr>
<tr>
<td>Castelfields</td>
<td>14.1</td>
</tr>
<tr>
<td>Grange</td>
<td>13.5</td>
</tr>
<tr>
<td>Halton Lea</td>
<td>14.9</td>
</tr>
<tr>
<td>Kingsway</td>
<td>12.3</td>
</tr>
<tr>
<td>Riverside</td>
<td>14.3</td>
</tr>
<tr>
<td>Windmill Hill</td>
<td>15.8</td>
</tr>
</tbody>
</table>

Source: ONS

The data indicates that a high proportion of residents from the Halton priority wards are employed in lower paid, routine occupations compared to the regional (9.8%) and national (5%) average levels. In particular, Windmill Hill (15%), Halton Lea (14.9%) and Riverside (14.3%) exhibit high levels of residents within this sector.

Correspondingly, the priority wards are underrepresented in the volume of residents employed in higher paid, lower and higher, professional occupations. The national and regional averages for lower professional occupations, 18.7% and 16.8% respectively, are significantly in excess of those of the priority wards; the highest of these being Kingsway (12.6%) and Appleton (11.5%). In particular, Windmill Hill stands out as highly underrepresented in this sector with only 5.5% of residents employed in lower professional occupations.

Similarly, all wards exhibit lower levels than the national (5.1%) and regional (4.2%) averages for numbers of residents employed in highly paying higher professional occupations. Again,
Windmill Hill (0.9%), Halton Lea (1.2%) and Riverside (1.5%) are the wards most poorly represented, and Kingsway (2.2%) the best, in this employment sector.

Education & Qualifications

The following table presents key education and qualification indicators for the priority wards in Halton, alongside regional and national comparators for the period 2005 to 2005.

Figure 8.13: Education & Qualifications Related Indicators within Priority Wards & Regional / National Comparators

<table>
<thead>
<tr>
<th>Education (%) (2004/05)</th>
<th>&gt;5 A*-C GCSE's</th>
<th>No GCSE Passes</th>
</tr>
</thead>
<tbody>
<tr>
<td>England &amp; Wales</td>
<td>56.0</td>
<td>4.2</td>
</tr>
<tr>
<td>North West</td>
<td>53.9</td>
<td>3.9</td>
</tr>
<tr>
<td>Halton Wards</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appleton</td>
<td>42.9</td>
<td>1.3</td>
</tr>
<tr>
<td>Castlefield</td>
<td>41.3</td>
<td>2.7</td>
</tr>
<tr>
<td>Grange</td>
<td>40.2</td>
<td>0.9</td>
</tr>
<tr>
<td>Halton Lea</td>
<td>27.0</td>
<td>9.5</td>
</tr>
<tr>
<td>Kingsway</td>
<td>41.3</td>
<td>4.1</td>
</tr>
<tr>
<td>Riverside</td>
<td>46.1</td>
<td>7.9</td>
</tr>
<tr>
<td>Windmill Hill</td>
<td>20.0</td>
<td>0</td>
</tr>
</tbody>
</table>

Sources: ONS, Halton Strategic Partnership – Halton Observatory

All priority wards are shown to have underperformed in 2005/04 against the regional (53.9%) and national (65%) average achievement of gaining five or more GCSE qualifications marked A* to C.

Of particular note are Windmill Hill and Halton Lea, where only 20% and 27% of students respectively achieved five or more GCSE qualifications marked A* to C. This is below 50% of the national and regional averages.

Several of the priority wards also had students whom obtained no GCSE passes (A*-G grade) above national (4.2%) and regional (3.9%) average levels. Of these, Halton Lea and Riverside demonstrated the highest failure rates of 9.5% and 7.9% respectively. The remaining wards showed above average levels of non-failure.
Travel to Work

8.72 The 2003 Neighbourhood Renewal consultation highlighted the inadequacy of the current public transport system, and transport infrastructure, as a key concern within the priority wards.

8.73 Of particular note were the areas of Appleton, Kingsway and Riverside, where residents felt that transport links to key employment sites were inadequate, as were the public transport services.

8.74 Resident opinion was found to be of a similar nature in Grange and Heath, where the poor quality of the road network and traffic congestion problems were seen as impediments to the area. Here, strong support was found for the Mersey Gateway Bridge due to the associated easing of congestion and traffic levels, on the existing Jubilee Bridge and the surrounding road network, and the upgrading of the local network and environment related to the new crossing.

8.75 The following table presents key transport methods for commuting by residents of the priority wards in Halton.

**Figure 8.14: Resident Travel to Work Method in Priority Wards with Regional / National Comparators**

<table>
<thead>
<tr>
<th></th>
<th>Method Of Travel to Work (% of Total Population)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Train</td>
</tr>
<tr>
<td>England &amp; Wales</td>
<td>2.7</td>
</tr>
<tr>
<td>North West</td>
<td>1.1</td>
</tr>
<tr>
<td><strong>Halton Wards</strong></td>
<td></td>
</tr>
<tr>
<td>Appleton</td>
<td>0.7</td>
</tr>
<tr>
<td>Castlefields</td>
<td>0.5</td>
</tr>
<tr>
<td>Grange</td>
<td>0.4</td>
</tr>
<tr>
<td>Halton Lea</td>
<td>0.4</td>
</tr>
<tr>
<td>Kingsway</td>
<td>0.7</td>
</tr>
<tr>
<td>Riverside</td>
<td>0.3</td>
</tr>
<tr>
<td>Windmill Hill</td>
<td>0.5</td>
</tr>
</tbody>
</table>

**Source:** ONS

8.76 Analysis of the data above suggests that utilisation of rail public transport for commuting is particularly low within all of the priority wards, compared to national and regional levels. Buses are also used at a frequency below the national (4.7%) and regional (6.1%) average for several wards, including Appleton (3.7%), Riverside (4%) and Grange (4.3%). High bus usage is recorded in Halton Lea (9.1%), Windmill Hill (7.6%) and Castlefields (5.6%).
8.77 The majority of priority wards exhibited use of car based transport at levels below the national (38.6%) and regional (39.5%) averages. Of particular note is Windmill Hill, with a car use rate of only 22.8%, which is likely to correspond with the aforementioned high level of households without car ownership in the ward (48.3%). At the opposite end of the spectrum however, Halton Lea (48.6%) exhibits car usage in excess of 10% higher than the regional and national averages.

8.78 Five of the seven priority wards have a higher average of residents that travel to work by foot than the national (6.3%) and regional (6.2%) averages, thus, indicating short commuting journeys. Wards with the highest levels of foot based commuting are Appleton (10.6%), Halton Lea (8.8%) and Kingsway (8.8%), followed by Riverside (7.2%) and Castlefields (7.2%). At the opposite end of the spectrum, Grange and Windmill Hill has the lowest levels of residents walking to work at 4.9% and 5.5% respectively.

8.79 The summary below subsequently identifies the distances travelled by residents, to work, within the identified priority wards. National and regional average levels are included as comparators.

Figure 6.15: Resident Travel to Work Distance in Priority Wards with Regional / National Comparators

<table>
<thead>
<tr>
<th>Travel to Work - Distance (km)</th>
<th>&lt;2km</th>
<th>2-5km</th>
<th>5-10km</th>
<th>10-20km</th>
<th>20-30km</th>
<th>30-40km</th>
<th>40-60km</th>
<th>&gt;60km</th>
</tr>
</thead>
<tbody>
<tr>
<td>England &amp; Wales</td>
<td>20.0</td>
<td>23.1</td>
<td>18.3</td>
<td>15.2</td>
<td>5.3</td>
<td>2.4</td>
<td>2.2</td>
<td>2.7</td>
</tr>
<tr>
<td>North West</td>
<td>21.2</td>
<td>22.8</td>
<td>19.5</td>
<td>14.4</td>
<td>4.6</td>
<td>1.9</td>
<td>1.5</td>
<td>2.1</td>
</tr>
<tr>
<td>Appleton</td>
<td>35.3</td>
<td>22.4</td>
<td>17.6</td>
<td>8.8</td>
<td>2.5</td>
<td>1.8</td>
<td>0.9</td>
<td>1.1</td>
</tr>
<tr>
<td>Castlefields</td>
<td>33.8</td>
<td>26.8</td>
<td>9.5</td>
<td>10.5</td>
<td>6.4</td>
<td>2.8</td>
<td>0.4</td>
<td>1.4</td>
</tr>
<tr>
<td>Grange</td>
<td>30.0</td>
<td>30.2</td>
<td>9.0</td>
<td>14.0</td>
<td>3.7</td>
<td>2.2</td>
<td>0.7</td>
<td>1.2</td>
</tr>
<tr>
<td>Halton Lea</td>
<td>27.6</td>
<td>26.8</td>
<td>10.0</td>
<td>12.9</td>
<td>6.3</td>
<td>3.1</td>
<td>0.5</td>
<td>2.2</td>
</tr>
<tr>
<td>Kingsway</td>
<td>34.5</td>
<td>17.7</td>
<td>16.5</td>
<td>13.1</td>
<td>3.1</td>
<td>2.8</td>
<td>1.1</td>
<td>1.8</td>
</tr>
<tr>
<td>Riverside</td>
<td>33.5</td>
<td>22.4</td>
<td>13.9</td>
<td>15.0</td>
<td>1.7</td>
<td>3.0</td>
<td>0.8</td>
<td>1.8</td>
</tr>
<tr>
<td>Windmill Hill</td>
<td>28.4</td>
<td>33.9</td>
<td>13.6</td>
<td>8.4</td>
<td>7.0</td>
<td>1.5</td>
<td>0.5</td>
<td>1.1</td>
</tr>
</tbody>
</table>

Source: ONS

8.80 The table above indicates that the majority of journeys to work by residents from priority wards are short in length. All wards exhibit levels above the national (20%) and regional (21.2%) averages for journeys of a shorter distance than 2 km. This trend is particularly acute in Appleton (35.3%), Kingsway (34.5%), Castlefields (33.6%) and Riverside (33.5%).
8.81 The majority of wards also demonstrate levels above the national (20.1%) and regional averages (22.6%) for journeys ranging from 2 km to 5 km in distance, thus indicating a high level of incidence in the wider distance bracket of 0 - 5 km. The highest incidence was in Windmill Hill (33.9%) and the lowest in Kingsway (17.7%).

8.82 Between 5 km and 20 km travel distances nearly all wards exhibited an average below the national and regional levels.

8.83 Towards the middle level commuting distance of 20 km to 30km, several wards exhibit levels above the regional (4.6%) and national (5.3%) averages. These are Windmill Hill (7%), Castlefields (6.4%) and Halton Lea (6.3%). Similarly, at the 30 km to 40 km commuting interval again Halton Lea (3.1%), Riverside (3%), Castlefields (2.8%) and Kingsway (2.8%) display levels above the national (2.4%) and regional (1.9%) average.

8.84 There are no wards with averages above the regional and national thresholds for the longer commuting distance of 40 km to 60 km, and only Halton Lea (2.2%) is marginally above the regional average (2.1%) for long commutes of more than 60 km.

Key Messages from Ward Level Analysis

- Halton is an area that suffers significantly from deprivation, and consequently requires holistic regeneration. The 2007 Index of Deprivation (IMD) ranked Halton as the nation’s 30th most deprived Borough. There exist large swathes of deprivation with Halton with Windmill Hill situated within the top 1%, and Kingsway and Riverside (West Bank) within the 5% most deprived wards nationally.

- Within the seven main IMD (2007) sub-domains all the LAA identified priority wards show significant problems. In terms of crime and disorder, all are within the 30% most deprived wards nationally and, in terms of education, skills and training deprivation, all priority wards exhibit a high level of deprivation compared to the national average. Kingsway demonstrates the highest levels of deprivation; positioned within the 5% most deprived wards nationally. Appleton, Riverside, Castlefields, Windmill Hill, Grange and Halton Lea all have considerable areas that are within the 10% highest ranked wards.

- For employment deprivation, the majority of Castlefields and the southern area of Windmill Hill are situated within the 5% most deprived wards nationally and Riverside, Windmill Hill, Halton Lea, Appleton and areas of the Grange ward are situated within the 10% most deprived wards nationally. This was supported by 2001 Census data, which revealed all seven priority wards exhibit levels of unemployment, long-term unemployment, permanent illness or disability, unemployment in households with
dependents, and residents who have never worked at a higher level than the regional and national averages.

- Health was evident as being particularly poor within the Mersey Gateway regeneration area. The areas exhibiting the highest levels of deprivation are Halton Lea, Windmill Hill, Castlefields and the southern area of the Kingsway ward. Each of the aforementioned wards features in the 5% most deprived wards at a national scale. Riverside, Grange, Appleton and the northern area of Kingsway also demonstrate a poor level of health, each being within the 10% most deprived wards nationally. The scale of the health problem is evident in the Mersey Gateway area, with all priority wards ranking within the 20% most deprived wards in England and Wales. This was strongly supported by evidence from the 2001 Census.

- Income deprivation analysis indicated a similar severity. Of particular significance are the Windmill Hill ward and the southern area of Kingsway which, all having extremely low income levels, are situated within the 1% most deprived wards in England and Wales. Several of the priority wards are situated within the 5% most deprived wards in the country; namely Castlefields and Halton Lea.

- In terms of commuting, the Census data highlighted particularly insular, and short, travel patterns for local residents in priority wards.

**Identified Priority Sub-Areas**

8.85 This section will look to provide an update, encompassing any areas within the Halton Borough that have 'fallen through the net' of the priority ward attention and, due to their socio-economic status, are thus deemed to require additional regeneration attention.

**The West Bank, South Widnes**

8.86 This area is located in South Widnes, directly to the East of the existing Jubilee Bridge and on the north bank of the River Mersey, has experienced recent scrutiny through the West Bank Neighbourhood Renewal Assessment (NRA), which was commissioned by Halton Borough Council and produced by RDHS Housing Consulting.

8.87 The West Bank is under the broader remit of, previously discussed, Riverside ward yet, as a community, is physically divorced from surrounding residential areas due to industrial infrastructure in the Waterloo Road area. This infrastructure also acts as a substantial barrier to Widnes town centre and the Kingsway and Appleton wards to the North.
8.88 It is worth highlighting that the Mersey Gateway Bridge will pass to the North and East of the areas extremities. As such, this area is in a prime position to benefit from the Mersey Gateway strategy, with the Bridge acting as a vital opportunity to correct, and develop beyond, the limitations and impediments present. The West Bank is presented as the following spatial output areas:

- 00ETNT0001
- 00ETNT0002
- 00ETNT0005
- 00ETNT0006
- 00ETNT0007
- 00ETNT0008

8.89 Key socio-economic data from the 2001 Census, and NRA (2006), is presented in the following section in order to establish a more detailed image of this particular area.

Socio-economic Profile

8.90 In December 2006 the West Bank Neighbourhood Renewal Assessment (NRA), commissioned by Halton Borough Council and produced by RDHS Housing Consulting, highlighted the necessity for intervention to sustain the local community, improve conditions and raise confidence in the area, arising from consultation with residents and key stakeholders.

8.91 Data presented from the 2001 Census records highlights that the West Bank is one of the most disadvantaged areas in Halton. This is supported by the NRA, which highlights that the West Bank is in the top 4% of the most deprived households for overall deprivation, health and employment deprivation according to the 2004 IMD.

8.92 The NRA (2006) consultation process demonstrated that health levels were perceived to be a major problem for residents in the area, where 47% believed smoke and fumes from neighbouring industrial works to be a specific concern.

8.93 The following graph presents key health indicators for the West Bank area, alongside regional and national comparators.

---

45 West Bank Neighbourhood Renewal Assessment (NRA) - RDHS Housing Consulting (2006)
**Figure 8.16: Resident Experience of ‘Not Good’ Health & Long-term Limiting Illness (%)**

with Regional / National Comparators

![Graph showing health data with regional and national comparators](image)

**Source:** ONS

8.94 The graph indicates that the West Bank experiences a level of poor health (21.6%) at more than double the national (9%) and regional (11%) averages. Similarly, the proportion of residents of the West Bank experiencing long-term limiting illness (37.1%) is significantly above the national (13.3%) and regional (16.4%) rates.

8.95 The standard of local amenities also appeared as a significant problem for local residents, with 49% of respondents to the NRA (2006) consultation believing local shops to be of only an 'average' standard and 23% perceiving the availability and appearance of local shops as a 'big problem'. Focus group data from the same study highlighted that residents would like to see the regeneration, and improvement, of existing facilities as a priority for investment.

8.96 In terms of housing amenities, 45% of consulted residents in the same study viewed the condition of local houses to be a 'big problem', and 35% felt the levels of housing vacancy to be a significant problem. Residents involved in aforementioned focus groups indicated that group repair should be a key priority for regenerative investment to bring housing up to the Decent Homes standard.

8.97 The following graph presents key amenity indicators for the West Bank area, alongside regional and national comparators.
Figure 8.17: Households with No Car & No Central Heating (%) with Regional / National Comparators

West Bank Households (%) with No Car & with No Central Heating against Spatial Comparators

Source: ONS

8.98 The data summarised above indicates that the proportion of households in the West Bank who do not have ownership of a car (46.8%), which is 20% above the national average of 26.8%, and over 16% beyond the regional average level (30.2%).

8.99 Consultation during the NRA (2006) highlighted that 40% of residents saw the level of economic activity in the area as a significant problem.

8.100 The following table presents key economic activity indicators for the West Bank area, alongside regional and national comparators.
Figure 8.18: West Bank Resident Economic Activity with Regional / National Comparators

<table>
<thead>
<tr>
<th></th>
<th>Econ Inactive (unemployed)</th>
<th>Long term unemployed</th>
<th>Permanently sick/disabled</th>
<th>Unemployed Households with Dependent Children</th>
<th>Never Worked</th>
</tr>
</thead>
<tbody>
<tr>
<td>England &amp; Wales</td>
<td>3.4</td>
<td>30.3</td>
<td>5.3</td>
<td>4.6</td>
<td>2.7</td>
</tr>
<tr>
<td>North West</td>
<td>3.6</td>
<td>31.7</td>
<td>7.8</td>
<td>5.8</td>
<td>3.1</td>
</tr>
<tr>
<td>West Bank</td>
<td>7.2</td>
<td>39.8</td>
<td>14.6</td>
<td>12.0</td>
<td>9.9</td>
</tr>
</tbody>
</table>

Source: ONS

8.101 The data reveals that the level of unemployed residents of working age in the West Bank (7.2%) is twice as high as the regional average of 3.6% and more than double the national level of 3.4%. In addition the percentage of those unemployed persons who are experiencing long-term unemployment, of six months or more, is significantly higher in the West Bank (39.8%) than at a regional (31.7%) or national spatial scale (30.3%).

8.102 This trend is also apparent for the percentage of persons in the West Bank who have never been in employment (9.9%), which is more than triple, and nearly quadruples, the respective regional (3.1%) and national (2.7%) average levels.

8.103 The proportion of those unemployed persons with permanent sickness/disability in the West Bank (14.6%) is also nearly twice the regional level of 7.8% and nearly triples the average for England and Wales (5.3%).

8.104 The number of households in the West Bank (12%) with no employed adults and dependent children is more than twice the North West (5.8%) and national (4.8%) average levels.

8.105 The following graph subsequently presents key occupation indicators for the West Bank area, alongside regional and national comparators.
Figure 8.19: Socio-economic Occupation Classification of West Bank Residents against Regional / National Comparators

Source: ONS

8.106 The graph above highlights the under-representation of West Bank residents within the higher, and lower, professional employment sector compared to the regional and national average levels. In fact, levels of employment in these sectors are approximately 50% lower, in the West Bank, than at regional and national scales.

8.107 The West Bank is also vastly over-represented in the routine occupations sector, with 14.2% of employed residents working in this low paid segment. This compares unfavourably with national and regional average levels, which sit at 9.8% and 9% respectively.

8.108 In terms of commuting distance for employment, the NRA (2006) consultation process revealed that a high proportion of residents (44%) travel a short distance, of less than 5 miles, to work.

8.109 The following summary presents the distances travelled to commute to places of employment for the residents of West Bank, alongside regional and national comparators.
Figure 8.20: Travel to Work Distances of West Bank Residents against Regional / National Comparators

<table>
<thead>
<tr>
<th></th>
<th>&lt;2km</th>
<th>2-5km</th>
<th>6-10km</th>
<th>10-20km</th>
<th>20-30km</th>
<th>30-40km</th>
<th>40-60km</th>
<th>&gt;60km</th>
</tr>
</thead>
<tbody>
<tr>
<td>England &amp; Wales</td>
<td>20</td>
<td>20.1</td>
<td>18.3</td>
<td>15.2</td>
<td>5.3</td>
<td>2.4</td>
<td>2.2</td>
<td>2.7</td>
</tr>
<tr>
<td>North West</td>
<td>21.2</td>
<td>22.6</td>
<td>19.5</td>
<td>14.4</td>
<td>4.6</td>
<td>1.9</td>
<td>1.5</td>
<td>2.1</td>
</tr>
<tr>
<td>West Bank</td>
<td>30.1</td>
<td>30.1</td>
<td>11.1</td>
<td>12.7</td>
<td>1.6</td>
<td>2.4</td>
<td>1.1</td>
<td>1.2</td>
</tr>
</tbody>
</table>

Source: ONS

8.110 The data above indicates that the residents of West Bank show highly polarised results towards extremely short travel distances to work. In particular, residents of the West Bank travel distances up to 5 km, on average, 10% more frequently than residents regionally or nationally.

8.111 For middle range commuting distances, of 5 km to 30 km, the volume of West Bank residents is significantly lower than the North West average and at a national scale.

8.112 Correspondingly, residents from the West Bank are underrepresented for longer-distance commutes ranging 40 km and above, at consistently lower levels than regional and national averages.

Key Messages from Socio-economic Analysis of the West Bank

- Local amenities and housing conditions are inadequate compared to regional and national average levels.
- Unemployment in the area is more than double the national average and, when economically active, the West Bank is extremely poorly represented in higher valued employment sectors and overrepresented in low paid work.
- Residents of West Bank show highly polarised results towards extremely short travel distances to work.

Key Conclusions from Analysis of Regeneration Areas

8.113 This chapter has described those wards, and areas within, which have the greatest potential capacity and requirement to respond to the development opportunity that is the Mersey Gateway regeneration strategy due to their physical situation within the immediate vicinity of the proposed Mersey Gateway Bridge.
8.114 These areas of Halton have been demonstrated to hold the highest rankings in terms of multiple deprivation, socially rented households and economic inactivity rates within the Borough, and are indeed some of the most deprived in the nation. As a consequence it is no surprise that these factors are highly correlated in these wards and represent a major focus of regenerative influence for the development.

8.115 Consultation, outlined above, has demonstrated the concerns of residents in the aforementioned areas in terms of health, education and employment, highlighting the necessity, and widespread support, for holistic and comprehensive urban regeneration to reverse the trends of decline and deprivation currently present.

8.116 Finally this does not preclude addressing the more deep rooted problems that are apparent across priority wards in the Halton area. The key to unlocking the potential of said areas is to ensure the opportunity for regeneration, provided by the Mersey Gateway proposals, is utilised effectively to provide improved socio-economic prospects for existing residents, to encourage new residents in through improved services and transport communications, and to secure high-quality, accessible employment areas and opportunities.
9. QUALITY OF PLACE FRAMEWORK

9.1 The purpose of this section is to explore the physical aspects of regeneration in more depth, based upon a tested appreciation of the character of the Mersey Gateway Regeneration Strategy area. It is important to note that the Mersey Gateway Regeneration Strategy will combine the economic and social aspects with the environmental and physical aspects of truly holistic regeneration, in supporting the overall vision for the project.

Character Appraisal

Urban Form and Growth in Widnes and Runcorn

9.2 In undertaking an urban appraisal of Runcorn and Widnes it is impossible to ignore the historic development pattern of the area and the contribution this aspect has had on the overall character and sense of place within the study area. A number of historical periods are evident and these are highlighted below.

Medieval/Pre-Industrial Period

9.3 The River Mersey has always played an important part in the historical development of the town. Located at a pinch point in the river as early as the 12th Century a Ferry operated across the Runcorn Gap. Essentially a Norman agricultural settlement, the area was punctuated by key structures including Halton Castle first established on Halton Hill in the 1070’s and Norton Priory in 1134. The remains of both of these structures are still evident today.

9.4 During the Norman period, Widnes was made up of a series of rural villages including Farnworth, Appleton, Ditton, Upton and Woodend. A Norman Church was built in Farnworth in the 11th Century.

Industrial/ Victorian Period

9.5 The proximity of the Runcorn to the river helped to underpin its economic importance in the eighteenth century and its urban growth in the late nineteenth century. Runcorn’s early urbanisation was based on its development as a canal port. In the mid 18th century the Bridgewater canal was completed and connected Manchester with the seaport of Liverpool and marked the beginning of the trade in coal and shipbuilding activity in Runcorn. Further canal links were established to Warrington (Old Quay Canal) and Weston Point by 1807.
9.6 As a direct consequence of this canal building the pace of industrial growth accelerated. These included shipbuilding, tanneries, soap works, the chemical industry and quarrying. During the 19th century Runcorn was dominated by an industrial landscape of giant chimneys of the soap works of Hazlehurst and Johnson.

9.7 The coming of the Railway established the first direct crossing across the Mersey between the two towns. In 1868 the Runcorn Railway Bridge was opened across the River Mersey, linking the towns to Liverpool. This was followed by a second crossing the Transporter Bridge in 1905 (now demolished), which for the first time created a direct vehicle and pedestrian access between the towns.

9.8 The urban form that was apparent in the 1850's and 60's (figure 9.1) included the following,

- Major infrastructure investment including the Sankey Canal and the Bridgewater Canal which ran east-west and the Railway Network which divided the towns.
- The Industrial core of Runcorn to the west of the town associated with its role as a port and along the Bridgewater Canal within the town.
- The historic urban core of Runcorn located along Mersey Road, Church Street and High Street.

9.9 Urbanisation in Widnes was triggered later than Runcorn, in the 19th Century with the extension of the Sankey Canal to the town. This combined with the St Helens and Runcorn Gap Railway in 1833 and the world's first railway dock at Spike Island just to the east of the Widnes. The opening of a major chemical factory (Hutchinson), the first in Britain, in 1862 at Spike Island established the industrial character of the town. This was later relocated to eastern side of the town and combined with further chemical works developments. The town grew dramatically with the development of associated worker housing particularly at West Bank and these subsumed the original villages.

9.10 The urban form that was apparent in the late industrial period included the following (figure 9.2);

- The addition of the Manchester Ship Canal in 1894 and the Transporter Bridge in 1905
- The dramatic urban expansion of Widnes which subsumed previous rural villages. The town centre located at Victoria Square (Victoria Road/Widnes Road)
- Isolated pockets of residential development associated with industrial activity, in particular West Bank which is separated from the Town Centre. The remnants of this period are still seen in the remaining grid road structure particularly along West Road.
The formalisation of arterial routes in Widnes and Runcorn and the establishment of a formal grid street pattern.

The expansion of Runcorn westward along the Bridgewater Canal and southward to Weston Village (Clifton Road)

Large monolithic areas of industrial land fronting onto the River Mersey but penetrating deep into Widnes and running along Weston Point.

The Contemporary Period

9.11 Massive expansion in Runcorn occurred in this period with the construction of the Runcorn Widnes Bridge in 1981 and its designation as a New Town in 1984, as an influx of residents were accommodated from Merseyside (figure 9.3). This led to the expansion from the Old Town mainly to east of Runcorn. However, economic restructuring and the decline of the chemical industry undermined the ability of both settlements to support existing and new residents.

9.12 A number of key urban characteristics resulted from this period.

- Runcorn was characterised by a unique road system which included an Expressway which defined the town in a figure of eight. Within these defined areas dedicated public transport routes or ‘Busways’ were provided. Therefore, substantial physical infrastructure led the structure of future growth separating the Old town from the New Town.

- The Masterplan (1968) for the New Town defined the extent of the industrial estates (including Astmoor) along the Manchester Ship Canal and to the east along the river Mersey and River Weaver.

- New neighbourhoods were created between 1966-1976 centred around a new Town Park included Palace Fields, Southgate and Castlefields. Halton Lea shopping centre acted as the focus for these new neighbourhoods with a series of smaller local centres.

- For the most part, the neighbourhoods of the New Town were separated from the canals and the waterfront

- The civic core of Widnes moved from Victoria Square to campus style civic buildings along Kingsway the main north-south route of the town. In addition, the retail focus of the town.
Place-Making Opportunities

9.13 The proposed Mersey Gateway will deliver an exceptional piece of architecture which will help to reverse the image and perception of this stretch of the river Mersey. Here is an opportunity, realised through the rationalisation of infrastructure and movement, which not only allows greater flexibility with regard accommodating future development, but can also facilitate connection between settlements and the waterfront.

9.14 Overall, the area lacks an identity appropriate to its outstanding location, the summary character of which is highlighted below.

Landscape Character Assessment & Analysis Methodology

9.15 Judgements made about the landscape are based on four criteria: character, quality, value and sensitivity.

- Character refers to the differential features between landscapes which make them distinct and recognisable.
- Quality refers to the condition of the character in terms of integrity and intactness.
- Value is the relative value attached to each landscape based on either national or local criteria (designations etc.)
- Landscape sensitivity refers to the ability of a landscape to accommodate change or development without detriment to its character.

Wider Landscape Character

9.16 The 'Countryside Character Initiative' published by Natural England provides a valuable starting point for considering the character the wider landscape character of Halton. It outlines a systematic description of the features that define the characteristics that make the landscape. Referring to this work, the area falls into the Mersey Gateway Character Area the key characteristics of which include:

- A very distinctive river-valley landscape focused on the Mersey, its estuaries and waterways (although the views of the river are often obscured).
- A range of landscape types, including salt marches around the estuary along with semi-natural mosslands.
Figure 8.4: Mersey Valley Character Area

- Broad linear valley with large-scale, open, predominately flat farmland supporting substantial bands of mixed agriculture.
- Trees and Woodland are scarce mainly associated with settlements.
- Large-scale highly visible industrial development, particularly at the river crossings of Runcorn, Widnes and Warrington.
- A dense communication network of roads, railways, canals and bridges.

9.17 Distinctive cultural landscape with major towns of Runcorn, Warrington and Widnes having much in common in relation to past and existing development pressures.

Local Landscape Character and Views

9.18 The context of landscape around the towns of Widnes and Runcorn (figure 9.5) is dominated by the Mersey valley which is estuarine in character with extensive mud and sand flats. The valley is a valuable site for nature conservation. The river and estuary combined with surrounding relatively flat low lying topography create broad panoramic views. Runcorn and Widnes represents a natural pinch point on the river, offering more expansive river views to the east and west.
9.19 The character of this surrounding landscape is influenced by the urban and industrial developments along the river, which in many cases have had a negative impact. The openness of the surrounding landscape is punctuated by vast industrial developments at Runcorn which dominate the skyline and dwarf neighbouring residential development.

9.20 For Runcorn and Widnes the imposing industrial feature of the Fiddlers Ferry Power Station dominates the landscape especially long range views to the east, particularly from Runcorn across the Mersey. It forms a backdrop both to the neighbourhoods of the towns and prominent local landmarks such as St Mary’s Church in Widnes.

9.21 South of the river, to the West of Runcorn the landscape is dominated by Runcorn Dock and associated shipping and industrial activity.

9.22 North of the river, to the west of Widnes, natural landscape is more prominent and views of this area are of a better quality being punctuated by less intrusive industrial developments at Hale Bank. The area becomes more rural in character farther along the river Mersey toward Hale Head.

9.23 The Silver Jubilee Bridge forms a natural centre point along this stretch of the river Mersey and is the most prominent landmark for both towns.

9.24 Other important view points of the River Mersey are Pickering Pasture and Spike Island and Catalyst Museum on the north bank. On the south bank Runcorn Hill, Halton Castle and Jubilee Bridge Promenade offer excellent views of the river.
Open Space Assets and Opportunities

9.25 Halton Borough Council has carried out a comprehensive Open Space Study (2005) which identifies the key open spaces in the area and any deficiencies or surpluses in the quality, quantity and accessibility of open space. Overall the borough is well provided for in open space terms and there has been an increase in open space provision in recent years. There is now almost 1,400 ha of public open space in Halton. The main findings of the study are highlighted below:

- Parks & Gardens: the overall quality of parks is good.
- Natural and Semi-Natural: Halton is well provided for in terms of natural and semi natural open spaces and is fortunate to have a number of regionally significant sites within its boundaries. It may be appropriate to investigate the protection of existing good quality sites and increase accessibility to sites. Natural and semi natural sites offer an excellent opportunity to develop contaminated land.
- Amenity Greenspace: there is a small overall deficiency of amenity greenspace and there are a number of areas outside appropriate catchments areas.
- Provision for Children and Young People: the quality of young people’s areas is variable across the Borough and the report highlights some of the higher and lower quality sites. There is also high demand for additional provision borough wide, particularly in Farnworth.
- Outdoor Sports Facilities: the playing pitch strategy highlights a shortage of junior sports pitches, other types of outdoor sports facilities are very accessible within the borough.
- Allotments: consultation highlighted that allotments are a valuable recreation and are currently 100% full. Although there is limited additional demand at present for further provision, some residents are outside the defined catchment area.
- Green Corridors & Linkages: there are many opportunities and much potential to develop and provide an enhanced network of green corridors (cycleways and walkways) to complement the existing linear green spaces and link the major open spaces together around the borough.

9.26 There are several main public open spaces which contribute significantly to the character of Widnes and Runcorn and these are illustrated in figure 9.6.
Figure 9.6  Open Space Assessment
• Spike Island - a sizable park and area of natural and semi-natural open space to the east of Widnes. It connects Widnes with the Sankey Canal and connects the town to the countryside to the east as the trans-Pennine trail runs through this area.

• Pickering Pasture Local Nature Reserve – in Widnes to the east of Ditton Marsh which has a Green Flag Award

• Runcorn Town Park and Phoenix Park – Runcorn Town Park forms a centre piece of the Runcorn New Town communities and Phoenix Park offers a range of play facilities for all ages

• Wigg Island Community Park- Situated on the Southern Bank of the River Mersey it acts as both a formal park and a sanctuary for wildlife (Green Flag Award).

• Runcorn Hill Local Nature Reserve – Formerly a previous quarry it also acts as a formal park and wildlife reserve (Green Flag Award).

**Opportunities**

9.27 Collectively, open space within Halton represents a significant green infrastructure network which connects the towns of Runcorn and Widnes to wider countryside. However these green infrastructure connections generally form north-south connections. East-West linkages between these open spaces are less pronounced. Redevelopment proposals should seek to create these east-west linkages between open spaces and waterfronts as a means of connecting new and existing neighbourhoods with key locations.

9.28 It is essential to realise that the provision of quality open space is a crucial element not only in place making but also in its role in contributing to the regeneration strategy for the area as a whole. Quality Open Space is one of the considerations house buyers take into account when selecting neighbourhoods to live in. This combined with the impressive views of the River Mersey and waterside locations associated with the canals represent a key residential selling point for Runcorn and Widnes. New suburban and urban housing development near to open space, parkland and woodlands with impressive waterfronts views remain a popular housing preference.
9.29 With this in mind a number of opportunities within the open space assets exist which can become the focus of future residential development. These include:

- Potential to use existing open space which surrounds the entrance to Wigg Island as a pocket park or viewing platform.

- Potential to deliver waterfront development along Manchester Ship Canal and overlooking both Wigg Island and the River Mersey. This could be achieved through the use of existing development sites, the relocation of existing industrial uses and the rationalisation of a small part of existing Busway.

- The potential to use Spike Island as an anchor for surrounding development proposals.

- There is potential for a small linear park to connect the college campus through to Runcorn town centre and Wigg Island to the west

9.30 Further opportunities to improve open space provision will be explored within the detailed analysis of each of the Impact Areas in the following chapter.
10. CHARACTER AREA ANALYSIS

10.1 The analysis contained in the previous chapters has been instrumental in examining potential opportunities for physical investment in the Mersey Gateway area. The interventions proposed will be developed following a fuller appreciation of the economic drivers of change (the Scenarios stage) and a fuller appreciation of the commerciality of delivery.

10.2 For the purposes of this Issues report, site problems and opportunities have been identified as part of a masterplanning framework, which will form the basis of the next stage of consultation with local stakeholders and the community and inform subsequent development of the regeneration 'Options'.

Southern Widnes

10.3 The character of South Widnes can be broken down into a number of discrete character zones, which are largely defined by the infrastructure of roads, railway lines, and waterways, all of which dissect and isolate the area from Widnes Town Centre and other parts of the Borough.

10.4 The poor circulation and lack of permeability, which afflicts the area today, can be traced back to successive infrastructure projects, aimed at improving the wider transport network. Undoubtedly, these have enhanced the wider network and opened up specific sites but these improvements have often been at the expense of local permeability.

10.5 Figure 10.1 (Widnes Movement & Barriers) illustrates the man made and natural features, which define the over riding character of isolation and poor permeability.
10.6 There are a number of man-made and natural barriers, which collectively dissect the area and isolate its community.

10.7 The River Mersey creates a definitive edge forming the eastern boundary and a natural barrier to movement.

10.8 The estuary landscapes offer few access points for pedestrians and the disused Sankey Canal reinforces the separation between the river corridor and the residential hinterland.

10.9 Spike Island is crossed by tracks which continue northwards threading their way through industrial estates and the railway line, which defines the northern perimeter of the area.

10.10 Links across the Mersey (at this location) are restricted to the Silver Jubilee Bridge, which runs between Runcorn and Widnes South predominantly serving the wider transport network. Local links are frustrated by the congestion and speed of traffic running across the bridge resulting in poor inter-town connectivity.

10.11 The railway viaduct and the expressway (A533) run north to south, forming the western boundary.

10.12 Victoria Road forms a further division, running north to south, through the centre of the area. As a gateway to Widnes South (the junction of Ashley Way West and Victoria Road), it is unfortunately restricted and narrow in character. The feeling of separation between the town centre and Widnes South is further accentuated by Ashley Way West itself, which as a main vehicular thoroughfare presents a number of challenges for pedestrians and local traffic wishing to cross it. The A562 (Ashley Way) forms the northern boundary of the Widnes South area.

10.13 The freight line off the West Coast Main Line railway line runs parallel to the south reinforcing the divisions, which exist between Widnes town centre and Widnes South. The railway also passes over Victoria Road next to an overhead road bridge of the A568 Widnes Eastern Relief Road, which heads north through the area before turning eastwards at the railway forming yet another boundary along Victoria Road.

10.14 The location is dominated by vehicles and road infrastructure creating an environment, where pedestrians are only likely to use the route out of necessity (most likely preferring to use the route within day light hours). The current layout means that pedestrians are less likely to feel safe or comfortable walking along Victoria Road and this creates an 'obstacle' impeding free movement between South Widnes and the town centre where inter-area
visibility is reduced and the Waterloo Centre left located in a poor setting adjacent the bridges.

10.15 The severance between areas north and south of the railway line and the issue of poor connectivity can hopefully be addressed in the designs developed as part of the MG project. This particular location has been identified by CABE as an opportunity, and an example, of where the new MG Bridge project can be utilised to address the issue of severance facing South Widnes at present. The threat however, is that if not properly addressed, the communities within Widnes South will remain isolated from the town centre and other parts of the Borough.

10.16 The infrastructure and barriers described above have conspired to fragment the area into a number of character zones. Figure 10.2 (Widnes Identity & Place) identifies eight sub-zones described below.
Character Areas

A) West Bank

10.17 The residential community of West Bank is located around a collection of terraced streets, which are predominantly arranged north to south. Older terraced properties are arranged to the east and west of Mersey Road. The condition and quality of the properties appears generally poor with the area inadequately served by shops and facilities.

10.18 The permeable housing grid, which characterises the industrial period is disrupted by later infill developments. Inward looking developments such as Davies Close and James Close are typical and restrict access east to west. These newer estates have disrupted the original grid of streets. North to south the links remain largely in tact. However, movement east to west is severely restricted leaving the potential of the Mersey Estuary inaccessible and an unrealised asset.

10.19 Key streets face towards the estuary, with the main ones being Inwell Street and Mersey Road linking to either end of a promenade park. Both streets are terminated by a number of expansive views across the Mersey containing many fine views of the Silver Jubilee Bridge and across to Runcorn Old Town, where the new Deck Development takes on a new prominence. Opportunities to extend the promenade park are currently being considered. A key site (formerly an office building) at the end of Inwell Street (at its junction with Terrace Road) is currently being considered for re use for residential development. Importantly the development brief established for the site considers the importance of keeping the waterside route open in line with policy objectives.

10.20 Through site visits (and mapping of the urban form over different time-periods) we have been able to identify parts of the study area that are permeable and legible - that is easy to walk through, with clearly identified routes, streets, squares, parks etc. In other areas we have identified locations where the urban form is weak and fragmented (or shattered). Locations where these conditions are found can be described as 'Shatter Zones'.

10.21 Shatter Zones are typically created where lines of infrastructure (roads and railways) have been threaded through existing neighbourhoods. For example: The proximity of the A533 (and the alignment of the expressway) which runs close to the west, prematurely severs the street pattern and impacts upon the quality of the existing public realm, which impedes permeability through the area making it less clear as to the route to take. Links for example to bus stops on either side of the A533 are poor being accessible only by subways and indirect routes.
10.22 In other locations (such as Terrace Road and St Mary's Road) the older street pattern is more legible. However, the character of the street is poor – being aligned by newer, two storey properties of low architectural merit. Given the proximity of the Mersey it is also disappointing that the layout of the estate does not relate well with the Mersey Estuary. Few of the streets are connected to the foreshore areas and the opportunities to present and frame the dramatic views of the Mersey seem to have been ignored.

10.23 The West Bank area also contains a small number of interesting buildings including St Mary's church (a grade II* listing), West Bank and the Catalyst Museum described below.

B) Catalyst Science Discovery Centre

10.24 The original building, which now houses the Catalyst Science Discovery Centre dates from around 1860. It is rendered with slate roof above four storeys, with a two storey wing containing various classical features. The building was originally constructed for the chemical firm of Hutchinson & Co and later used by Gossage's. More recently, the building was converted into a museum with additional fifth glass-surrounded storey and a glass external lift to the east.

10.25 The Catalyst Science Discovery Centre stands apart from the grain of residential streets marking an important corner and junction between the neighbourhood of West Bank and the open spaces of the Mersey Corridor. Today it is used as a museum celebrating the Town’s historic associations with the Chemical Industry providing an exciting display of interactive and educational facilities. The building is listed and contains four interactive galleries with over 100 different exhibits and a glass observatory at the roof level, which provides panoramic views across Cheshire. The museum also offers free car parking, and a shop and the ‘Elements Cafe’.

C) Spike Island & the Waterside

10.26 The Waterside Development Strategy for Halton (March 2005) sets out a number of aims and aspirations for the Sankey Canal Waterfront, which aim to attract development and support an expanded range of leisure uses, which are to date unrealised. Along the waterfront there is an opportunity to establish an uninterrupted waterfront promenade and maximise development opportunities at key locations along the waterside. These aims are reflected in current policy - South Widnes Action Area RG1 - which promotes mixed use and redevelopment of the waterfront areas.
10.27 The Sankey Canal also forms an access point to the Trans Pennine Trail and forms an important access point to the wider estuary for anglers, walkers, cyclists, and pedestrians.

10.28 However, a number of existing developments within the West Bank area run down to the waterside and therefore frustrates wider movement along the waterside, which if addressed could also form part of a valued commuter link between the residential areas and employment areas - provided that secure, direct routes can be created. This is particularly important within areas of South Widnes, where a number of more recent housing developments have eroded the area’s permeability and ignored the potential links to the waterfront.

10.29 The waterside potential is realised and supported through the development of ‘Greenway Routes’ and strategic environmental improvements implemented with funding secured within the Widnes Waterfront area, which is designated as an Economic Development Zone.

10.30 In the immediate vicinity of the Museum, the Sankey Canal now has restored lock gates, joining the River Mersey at Spike Island. The Grade II listed lock gates date from 1833 with later alterations and repairs and control a difference in water level of 12 feet (3.6 m) between the canal and the river level.

10.31 In 1990, the island itself was used to hold an outdoor rock concert headlined by the Stone Roses, which was reportedly attended by 27,000 people. Spike Island (with its proximity to the Mersey Estuary and the Sankey Canal) has the potential to be developed further as a destination for leisure uses related to its waterside location. Improving its accessibility (following construction of the proposed Mersey Gateway Bridge) for such purposes must also carefully consider the important links to the wider green network, which also includes a number of adjacent sites of nature conservation interest.

10.32 To the west of the Silver Jubilee Bridge (within the 3MG area) sites of local ecological interest include the banks of Ditton Brook and the Mersey Estuary itself.

10.33 The Mersey Estuary is designated as a Special Protection Area (SPA) and as a Ramsar Site, and Site of Special Scientific Interest (SSSI) containing large areas of inter-tidal sands and mudflats, reclaimed marshland, and a range of important habitats.

10.34 The SSSI, SPA and Ramsar site extends eastwards as far as the Runcorn-Widnes (Silver Jubilee) Bridge. The upper Mersey and Wigg Island (on the opposite bank of the Mersey) is designated as a non-statutory Site of Importance of Nature Conservation.

D) Wandsworth Way / A533


10.35 Area D comprises industrial land lying between Wandsworth Way and the A533. It currently contains a recreational area (sports pitches) and storage yards and builders merchants forming part of a low quality gateway into the Widnes South area with convoluted access off the A533 and into the core of the area via Hutchinson Street.

E) Waterloo Road

10.36 Despite the isolation and lack of permeability the area continues to support a mix of uses. Area E spans Waterloo road and comprises a garage showroom and workshop surrounded by small industrial units, providing a mix of employment opportunities and valued local employment uses, which are located in a mix of accommodation of varying quality and design. Storage areas and compounds are often arranged in locations that are visible from the adjoining residential streets reinforcing the areas traditional industrial image as an area known for its mix of ageing, moderate quality buildings close to Widnes town centre.

10.37 Trafalgar Court (located to the south of Area E) houses a number of workshops and lock up premises.

F) Catalyst Trade Park

10.38 The Catalyst Trade Park was developed over the last ten years and houses a mix of employment uses including car hire and leasing businesses, a cleaning company, and a plumber’s merchant. The area is affected by the Mersey Gateway proposals, with the land required to deliver the preferred route.

G) Ashley Way

10.39 The area is affected by the Mersey Gateway proposals, with the land required to deliver the preferred route. It currently contains a number of older industrial premises of low quality located on land fragmented by Ashley Way West, Ditton Road and the railway, which runs east to west along its southern boundary. Current uses detract from the character of this important corridor and include a very visible scrap merchant and numerous low quality storage yards and a mix of under utilised buildings.

H) Thermophos

10.40 Area H comprises Thermophos Chemical Works, which lies to the north east of the Catalyst Trade Park forming an industrial feature in many of the local views reinforcing the area’s industrial character and associations with the chemical industry.
Runcorn Old Town

10.41 The character of Runcorn Old Town can be broken down into a number of discrete character zones, which are largely defined by the underlying topography and the layout of streets, roads, waterways and the railway.

10.42 There is a recurring theme of poor circulation and poor permeability, which is a by-product of the transport networks which converge upon the town at the crossing point of the river Mersey.

10.43 The character of the town is also defined by the quality of the views to the north, which offer an impressive sense of scale with some of the best views found on the north facing Runcorn slopes, which lie above the older town. These views include the estuary landscapes set within an expansive array of industrial infrastructure, which includes the splendid Silver Jubilee Bridge and the remnants of the older industrial plants located in Widnes and at Fiddlers Ferry for example.

10.44 Figure 10.3 illustrates the man made and natural features, which define the character of the town.

10.45 Runcorn Old Town has the potential to feel more like a 'market town' where its special location - on the banks of the Mersey can be used to create a vibrant, place to live, shop or visit, and is defined by its waterway, rail and road networks. The character and context for change within the Runcorn Impact Area is discussed below.
The Waterways

10.46 The Mersey Estuary, the Manchester Ship Canal (constructed in the later half of the 17th Century), and the Bridgewater Canal (built in the 1770’s) are aligned east to west creating corridors around which industrial premises, wharfs, and neighbourhoods have traditionally been arranged over a number of years.

10.47 The Promenade to the north of Mersey Road includes waterside pocket parks, visitor car parking and some limited interpretation boards from which excellent views of the Mersey and the Silver Jubilee Bridge can be enjoyed. 466 new apartments (by Bryant Homes – The Deck) are also under construction to the east of the promenade.

10.48 The Bridgewater Canal is located to the south of the town centre and has recently received a number of improvements under the Bridgewater Way Programme – a leisure scheme that is regenerating the waterside area along Runcorn’s length of the Bridgewater Canal as part of a wider transformation, which will connect numerous communities along the 39 miles (65km) stretch of waterway.

10.49 Complementary investment has also led to the opening of the Brindley Arts Centre on the north bank of the Bridgewater Canal, which currently terminates at the Runcorn Basin to the west. In former times the canal continued westwards and joined the Manchester Ship Canal. The original route and alignment of the canal (now dismantled beyond the Runcorn Basin) is protected from development under current planning policy although the alignment and layout of the Runcorn loops of the expressway (leading to the Silver Jubilee Bridge) currently limits the likelihood the original route being reopened without significant funding and commitment.

10.50 The merits of opening up the canal would be the stimulation of further water borne tourism interest in the borough and encouragement for increased use of the canal basin supporting adjacent development. Reconnecting the two waterways would also open up the Borough to water-borne traffic using the Weaver Navigational Canal, which could be accessed using the Manchester Ship Canal - arriving into Runcorn from the west.

10.51 It may be possible to consider reopening the canal route as part of the de-coupling strategy, which will see changes in the layout of the Runcorn Loops through the engineering works proposed to the Silver Jubilee Bridge. The aim is to “de-couple” the bridge from its high capacity feeder roads. Other possible solutions to connect the two waterways should also be considered. It may, for example, be feasible to develop a link further east of the town centre where the two routes are remarkably close together (as at Astmoor).
10.52 Within the old town an emerging canal side quarter now straddles the Bridgewater Canal incorporating land to the rear of High Street and south of the town.

10.53 The proposed waterside developments at Canal Quarter and at the Deck overlooking the Mersey Estuary will complement the Old Town’s convenience centre helping to create nodes of activity stimulated by the waterside character of the town.

The Movement Network

10.54 The town’s transport infrastructure makes the conurbation distinctive, with a unique setting characterised by its post card views as seen from Runcorn Gap, where the town is framed by the Silver Jubilee Bridge and the rail viaduct, a Grade II listed structure. The bridge, known as the Aethelfleda Railway Bridge, was built to a design by William Baker, Chief Engineer in 1868.

10.55 However, the expansive elevated rail structures impede movement from one local area to the next. In particular, a number of unsatisfactory pedestrian routes form low quality connections between the Station, traditional residential areas (west of the railway) and also between the houses and Runcorn Basin. Pedestrian routes are also diverted along convoluted routes using subways and stairways to circumnavigate the expressway.

10.56 The Daresbury Expressway and the Weston Point Expressway are both aligned broadly east to west. Heavily planted roadside margins, and featureless grass verges, compartmentalise areas north and south of the key route enclosing views for the motorist.

10.57 The expressway road network, which includes grade-separated routes, has effectively created a large barrier between the Old Town and the residential suburbs lying to the south.

10.58 Navigation around the road system is confusing with little to differentiate one locality from the next. Links to and from Widnes are confused, and currently congested, due to the volume of traffic using the Silver Jubilee Bridge today.

10.59 However, following the opening of the proposed Mersey Gateway Bridge, the Silver Jubilee Bridge will once again take on a local function. Through-traffic will be encouraged to take a more direct route to the east of the town centre as currently proposed in the Reference Bridge Design (figure 2.1).

10.60 A number of highway changes, as a result of taking through traffic away from Runcorn Old Town, will now be possible. The emphasis for these changes should be placed upon high quality local links and improving the setting of the town.
Mersey Gateway & De Coupling

10.61 The main transformations arising for Runcorn Old Town (from the Mersey Gateway project) will aim to unlock development potential and tackle the issues of severance by removing obsolete infrastructure. This currently blocks movement between the town centre, station area, and residents living to the south of the expressway. This may include the removal of overhead structures and elevated links (or perhaps even more ambitious changes to the existing highway network).

10.62 De linking parts of the network will also allow the Silver Jubilee Bridge to serve local needs by re-linking the two towns of Widnes and Runcorn and improving their inter-connectivity.

10.63 The Queensway Expressway, which runs northwards to the Queen’s Silver Jubilee Bridge, will take on a new role in the future – focused upon establishing stronger links between Widnes and Runcorn, and encouraging pedestrian, cyclists, and tourists, to linger and enjoy the dramatic aerial structure and views across the Mersey.

10.64 In addition to these benefits, encouraging vehicles to use alternative routes (except for local business) will also release land, which if considered as part of a comprehensive physical intervention strategy could release a number of high quality development opportunities at the key gateways to the town.

10.65 To achieve these aims the physical intervention strategy will need to look closely at the layout and arrangement of the Daresbury and Weston Point Expressways in order to ensure the sites brought forward create viable, accessible and well-connected development opportunities. In essence this will require down-grading of the expressway network in favour of local gateways and the creation of high quality places founded upon the town’s unique character. From a transport perspective this will mean reconfiguration and improvements to the town’s network of roads, streets, squares and improvements to the quality and safety of the highway environments.

10.66 If adopted, this strategy will vastly improve the relationship between the core of the town and the suburban residential hinterland, with the potential to re-link the railway station, which is currently isolated from the town centre by the canal and expressway. Connectivity with areas to the west of the A533 Queensway Expressway are also poor, separating both the station area, and the town centre, from the college area and Runcorn Docks - where substantial investments are planned.
10.67 To achieve these aims the physical intervention strategy for Runcorn (outlined in the subsequent Economic Scenario Report) examines strategic changes to the layout of the Runcorn Loops and the expressway network, which may support some additional development opportunities. The focus area includes land within the vicinity of the Runcorn Basin, areas west of the overhead road running east off the Silver Jubilee (which currently impacts upon the quality and character of the canal basin) and the station area and other areas westwards leading to the Runcorn Docks area. Here, the owners Peel Holdings are preparing a masterplan framework.

Runcorn Old Town Centre

10.68 The town has a mixed character and is laid out around well-defined streets, with the changes of level giving the town its own sense of place. The buildings are predominantly small-scale even within the town centre.

10.69 Runcorn Old Town Centre is the smallest of the Borough’s three centres. It serves as the dominant convenience centre within Runcorn’s local catchment with a very strong role specialising in financial and professional services, which according to data published by Halton Borough Council (see Runcorn Old Town-Town Centre Strategy February 2007) comprises over 21% of the total floor space of the town. In comparison, convenience goods retailing remains below capacity when measured against the Borough’s other centres, which is unusual for a small town.

10.70 The town centre lacks the usual high street nationals but has over 180 shop units and almost 145,000 Sq ft (13,500m²) of retail floor space, with character full streets and a reasonable quality of external environment. However, poor access – served by a convoluted route off the expressway has had an impact upon the town’s visibility, which detracts from the experience for visitors, workers, and shoppers, and undermines the town’s role as a convenience centre.

10.71 The town also has a swimming pool, entertainment venues, clubs, pubs, and cultural and educational facilities (including the award winning Brindley Arts Centre) and a range of residential property arranged around the centre.

10.72 Recent improvement strategies and new developments have begun to lift the character and appearance of the town centre area improving its general image. Works to date include traffic calming and public realm treatments and the construction of seating areas and small urban spaces adding to the impact made through the implementation of the new bus station and the new Brindley Arts Centre.
10.73 The town's proximity to the Manchester Ship Canal and Mersey Estuary (with pockets of pleasant townscape) is a recognised asset, which is now beginning to be realised through the development of new residential apartments and waterside houses to the east (The Deck development) and west of the Old Town (at Dukesfield), where two key developments enjoy a direct relationship with the estuary (over looking the Ship Canal) between which lies the Runcorn Promenade.

10.74 To the west of the town, lie a number of traditional terraced residential neighbourhoods and the Borough College. Within the older terraced housing areas, the streets are narrow and dense lying in close proximity to the railway and the overhead roads of the Queensway.

10.75 At Dukesfield, the new housing (which includes some infill development with streetscape improvements) is beginning to help sustain the popularity of the area, which is predominantly owner-occupied.

10.76 Council housing close to Runcorn Old Town has also been improved but the mix and variety of accommodation located within the town itself requires diversification. This is beginning to occur through the erection of new residential apartments. Crucially any such new development must be well connected to other parts of the town and add to the quality of place by providing a high quality public realm.

**Astmoor / Wigg Island**

10.77 The character of Astmoor/Wigg Island can be broken down into a number of discrete character zones which, for the most part, are the result of the comprehensive 1960's-1970's planning of this northern part of the Runcorn New Town:

- 1) Astmoor Industrial Estate represents a sizable part of the impact area. Its urban form is defined by east-west connections including Astmoor Road which service this business park and the Runcorn Busway - running along Dewar Court. Unsurprisingly large building footprints characterise the area. However, the potential negative impact of Astmoor Industrial Estate on the area to the north is mitigated against through generous landscaping and changes in topography with the industrial estate located on higher ground.

- 2) To the west of the Central Expressway older inner-war residential neighbourhoods predominate. Developed in the 1920's these suburban mostly semi-detached houses are organised in cul-de-sacs feeding off Halton Road.
3) This area forms part of the Runcorn New Town Development and its identity is determined by both the Central Expressway running north - south and its classic residential Radburn layout. Typically, there is a separation between vehicle and pedestrian movement. Vehicle access is gained through adjacent cul-de-sacs and pedestrian connections lead to the Express Busway route to the south of the area. The orientation of residences is confusing and this is compounded by the quality of buildings.

4) The character zone to the north of the area is determined by excellent views of the River Mersey, the Manchester Ship Canal, the Jubilee Bridge and Wigg Island. The most dominant feature of the area is Wigg Island which is a 25 ha Community Park. The park facilitates views of the Mersey with denser landscaping and trees on the eastern edge.
10.78 There are a number of man-made and natural barriers, which collectively critically dissect the area from Runcorn Town Centre as well as isolating the neighbourhoods to the south. For the most part the over-predominance of east-west vehicle connections through the area causes severance.

10.79 The Manchester Ship Canal creates a definitive edge forming the northern boundary. Wigg Island can only be accessed by vehicle from the east, along Astmoor Road, across a single lane bridge (Wigg Island Swing Bridge). Direct vehicle access from the town centre to Wigg Island is not possible.

10.80 The Daresbury Expressway runs east-west through the area and adds a further layer of severance particularly between the north eastern character area and Linnet Park.

10.81 Finally, the Daresbury Expressway and Bridgewater Canal isolate the neighbourhoods to the south of the area and there is no direct north-south pedestrian or vehicle connection between these southern neighbourhoods to Wigg Island despite its proximity.

10.82 Pedestrian connections from the character area to Runcorn Old Town along the Manchester Ship Canal are poor and are hindered by new waterfront housing development which does not facilitate easy access to the town (The Deck Bryant Homes).

**Rocksavage and Clifton**

10.83 The eastern part of Rocksavage and Clifton is a key southern gateway to Runcorn from the M56 and the A557. The character of Rocksavage and Clifton is defined by a number of large land uses and road infrastructure which determine specific character zones. In many cases long range views from within the area are dominated by these large occupiers (figure 10.5).

1A/1B Cholmondeley Road

10.84 This isolated rural area, Clifton Village, was once connected by Cholmodeley Road to Halton in the north. A small number of late Victorian terraced houses remain and run along Cholmodeley Road which sweeps steeply toward the Weaver Canal.

10.85 There are remnants of Rocksavage house, a 16th Century mansion owned by Sir John Savage, which is the site of a former historic building Clifton Hall.
The Weaver Canal forms the southern edge of the Impact Area and is used by the Runcorn Rowing Club. The character of the area is undermined by views from the canal which include the southern part of Weston Point Docks, large overhead power lines, and the M56 to the east. A narrow stretch of the Canal is subject to flooding and falls within Environment Agency Flood Zone 3 and 4. Previous industrial uses and associated activity means that area could be constrained by contamination.

2) Clifton Road

Clifton Road does much to define the suburban character of this zone. This is an important arterial route to Runcorn, which is lined with well matured trees and large detached residential properties. Behind Clifton Road more recent 1970's residential development of detached and semi detached properties are inward looking and are arranged in cul-de-sac's. The suburban character of this area is underpinned by the adjacent Golf Course and allotments.

3) Weston Point

Both the Rocksavage Power Station and Weston Point industrial dock define the south-western edge of the Impact Area. This strong heavy industrial character limits the future development potential of the area.

5) Ashville Point/Sutton Quays

Finally, Ashville Point Industrial Park and Sutton Quays Business Park determine the character of the eastern edge of the impact area. More recent office development is associated with Sutton Quay's Business Park. Ashville Point Industrial Park represents a mix of light industrial uses, storage and distribution services with poorer quality buildings. Much of the eastern part of the estate is used by a car storage and distribution company. Overall
the setting and attractiveness of Sutton Quay – located in the heart of the area – is significantly undermined.

Movement and Access

10.96 Overall north-south movement within the Impact Area is particularly restricted by the Weston Point Expressway, the railway lines to the north, and the sizable golf course.

10.91 The existence of the Power Station restricts east-west movement on Cow Hey Lane and other east-west vehicle links are dominated by the Dock and associated traffic. Finally, access to the M56 from the Sutton Quay’s Business Park is complicated by a series of two roundabouts.

Mersey Gateway

10.92 As part of the Mersey Gateway route the Central Expressway would join up with the M56 Motorway at Junction 12. As part of this connection the roundabout on the A557 will be realigned with signalised junctions put in place. The realigned roundabout will be enlarged and will require adjacent land take. Our physical intervention strategy below accommodates these requirements.
Halton Lea

Character

10.93 The Halton Lea Impact Area is located directly to the east of the Central Expressway and contains four broad character zones highlighted in figure 10.6.

1) Halton Lea Shopping Centre

10.94 Overall the character of Halton Lea reflects its initial development in the 1970’s when it was one of the largest shopping centres in Europe. The layout and appearance of the centre typically exhibits some of the urban design features of the time, including;

- An aspiration to make Halton Lea the focus of surrounding new town neighbourhoods and the dominant centre where retailing is concentrated.
- A framework which favoured the unconstrained use of the motor car, but offered surrounding neighbourhoods and residents the choice between public and private transport.
- A separation between pedestrian and vehicle movement.
- Large development blocks and a retailing experience which was concentrated within an enclosed second floor mall.

10.95 Despite subsequent redevelopment around the centre, these features dominate and are apparent from the main gateway to the centre from West Lane. West Lane is lined with mature landscaping which helps to soften the hard standing associated with the dual carriageway.

10.96 However, first impressions of the centre are defined by the large monolithic multi-storey car parks which have blank facades, the absence of ground floor uses and the pedestrian bridges and the elevated busways.

10.97 The general quality of buildings surrounding the centre is poor and creates an unattractive and uncompromising environment. Some examples include Grosvenor House, East Lane House and buildings associated with Trident Park.
2) Halton Hospital

10.98 Halton Hospital takes up a sizable part of the south eastern edge of the impact area. The importance of emergency vehicle movement and road links associated with the Hospital should be kept in mind along with public transport connections to the Hospital.

3) Hallwood Park and Beechwood

10.99 The Hallwood Park and Beechwood neighbourhoods date from the 1970's. Hallwood Park, previously know as Southgate, was redeveloped in the 1990's and now provides larger residential family properties in response to changing market demand. The areas are suburban in character and semi-detached houses predominate which are arranged in cul-de-sacs off the primary routes of Hallwood Park Avenue and Beechwood Avenue.
4) Palacefields

10.100 Palacefields dates from the 1970's and its layout and properties are older in nature than Hallwood Park. Palacefields, to the east of the shopping centre, is an area of radburn style housing. Properties within the estate are internal looking and small terraced housing predominates. The radburn style layout does not encourage natural surveillance. Vehicle and pedestrian movements are separated and there is substantial internal open space. Despite the poor layout, properties, open space and landscaping have been well maintained and there seems to be little or no vacancies. Development opportunities are limited and the restructuring of radburn layout would require comprehensive redevelopment.

Movement and Access

1) Halton Lee Shopping Centre

10.101 Way finding is difficult, and the centre is effectively inward looking with the main entrance to the centre hidden within Trident Park. Overall, the vehicle access arrangements are over complicated and constitute a grid of dual carriageways arranged around the shopping centre. This arrangement does not encourage on-street pedestrian movement. The primary access to the centre from the Central Expressway is along West Lane.

10.102 Vehicle access is organised in a grid of dual carriageways around the shopping centre which terminate with roundabouts. A one way two lane traffic network surrounds the civic quarter which includes Grosvenor House. General vehicle access and servicing is also achieved underneath the shopping centre (along 4th and 5th avenue). On-road external pedestrian movement is not adequately provided for around the shopping centre and civic quarter.

2) Hallwood Park, Beechwood and Palacefields

10.103 Crucially direct vehicle access from Palacefields (and other surrounding neighbourhoods to the east) to Halton Hospital and the shopping centre is not possible.

10.104 Two pedestrian access routes from the centre to the east (Palacefields) exist which utilise footbridges. This is replicated to the west of the shopping centre. Pedestrian access from the centre to the north (Halton Village) is achieved through an underpass.

10.105 The development of Trident Park has reduced direct pedestrian links from Hallwood Park to the shopping centre. Existing links require improvement and new links could be created.