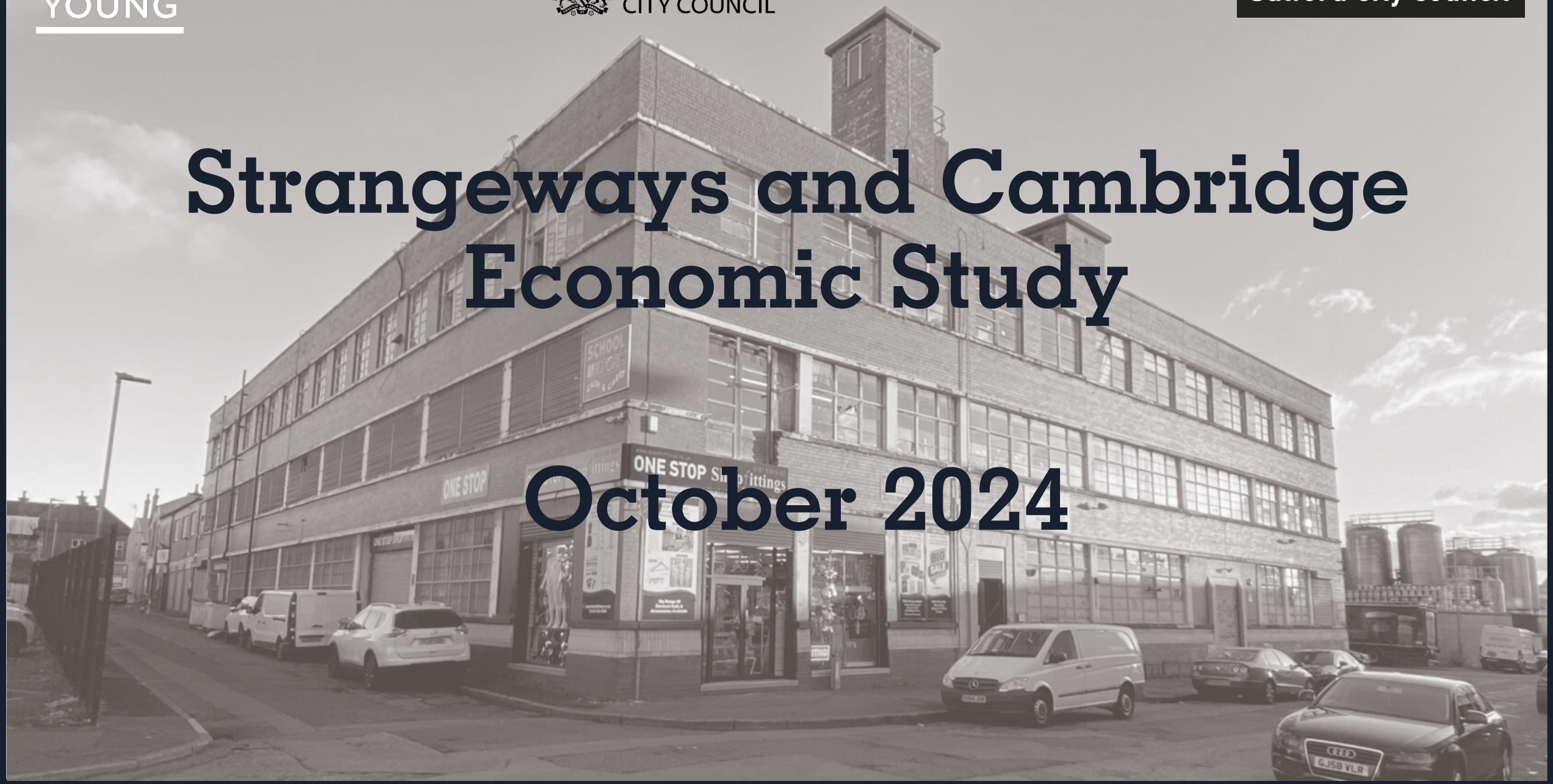
AVISON YOUNG

MANCHESTER CITY COUNCIL

Salford City Council

Strangeways and Cambridge Economic Study

October 2024



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Executive Summary



Executive Summary

This Economic Study has been commissioned by Manchester City Council and Salford City Council as an evidence base to support the Strangeways & Cambridge Strategic Regeneration Framework (SRF).

This Study sets out the policy, demographic, economic and real estate contexts of the area which inform the SRF. It responds to council policy as well as previous research including the Strangeways CLES Report (2015) and the requirements as set out in the brief for this commission. These include the size and nature of the local residential community, the area's economic geography and the changes within it, the relationship to Manchester City Centre, and its efficiency of space and labour.

The contribution of the Strangeways & Cambridge economy today
The Strangeways & Cambridge Strategic Regeneration Framework (SRF) area is home to over 3,126 businesses, which employ 14,290 and contribute £618m of Gross Value Added and £7.57m in business rates. The area is also home to 2,092 residents who contribute to the culture and economy of the local area and the wider city beyond.

There are strong inter-relationships between businesses in the area, with the wholesale sector in particular benefiting from a high degree of agglomeration which attracts customers from across the UK. Similarly, the growing leisure offer has a reach far beyond the study area, with venues acting as a network that attract people to the area for live music and club nights.

A range of factors are reshaping the economy
The SRF area is one undergoing economic transition. The area's dominant sector of textiles wholesale has been disrupted in recent years by structural shifts – namely, the rise of online retail, the UK's exit from the EU and changes in attitude of the next generation of family-owned business operators. Some local traders have shifted towards retail or wholesaling different products, but fundamentally the economic community remains intact despite its vulnerabilities.

The pace of change has been incremental, but there is potential for it to quicken given its proximity to the expanding city centre, the increasing demand for different forms of employment space and the continued evolution of online sales.

This disruption opens opportunities for alternative and emerging sectors to grow in the area, which is already evident in the prevalence of creative, entertainment, and leisure businesses locally. All these businesses draw significant (and diverse) footfall to the area, placing the area as an economic 'gateway' which attracts people to Manchester and Salford. Although their numbers are still small, these businesses currently appear to operate reasonably well alongside neighbours working in the traditional economy.

There is a clear need for investment to support business activity
What is common across both the area's traditional and new economies is a need to ensure it functions in their interests going forward. Operation Vulcan has had a positive impact, but many businesses continue to report other place management issues which negatively affect the area's reputation, including fly tipping, parking issues and personal safety.

Given the uncertainties over the traditional economy and the modest growth of its new economy, there is a need to support the SRF area through this process of change. The framework that this Economic Study underpins will provide this support by creating confidence and establishing clarity as to the future direction of Strangeways and Cambridge. This will in turn not only encourage investment in existing sectors, but also facilitate new and innovative businesses and occupiers to locate here. This combination - of investment and growth in both the 'traditional' and the 'new' sectors - will ensure Strangeways' and Cambridge's contribution to Greater Manchester's economic success in the years to come.

Key Economic Facts

Residents: 2,092*

GVA: £618m

Businesses: 3,126

Employment: 14,290

Business Rates: £7.57m (net liabilities)

Key economic themes:

- ***Transitioning from the wholesale economy.***
- ***Strongly embedded in local, regional, national and international economic networks.***
- ***Linked to Manchester city centre but not critical to its functioning.***
- ***Home to culturally-significant organisations and exporters that make it a destination.***

Sources: ONS, FAME, IDBR, Experian, Manchester City Council and Salford City Council. Details of sources found on relevant pages of this report.

**ONS data adjusted by subtracting an estimated population which fall within the defined statistical boundaries but outside the SRF boundary. This is based on a count of dwellings multiplied by 2.4 persons per household*

Introduction



Introduction

Avison Young have been commissioned, as part of a wider multidisciplinary team, by Manchester City Council and Salford City Council to develop the Strangeways and Cambridge Strategic Regeneration Framework (SRF).

The SRF area has a long history of economic activity and remains the largest urban industrial area within the city. However, the economy of the area has been impacted by various factors in recent years that have a bearing on its future.

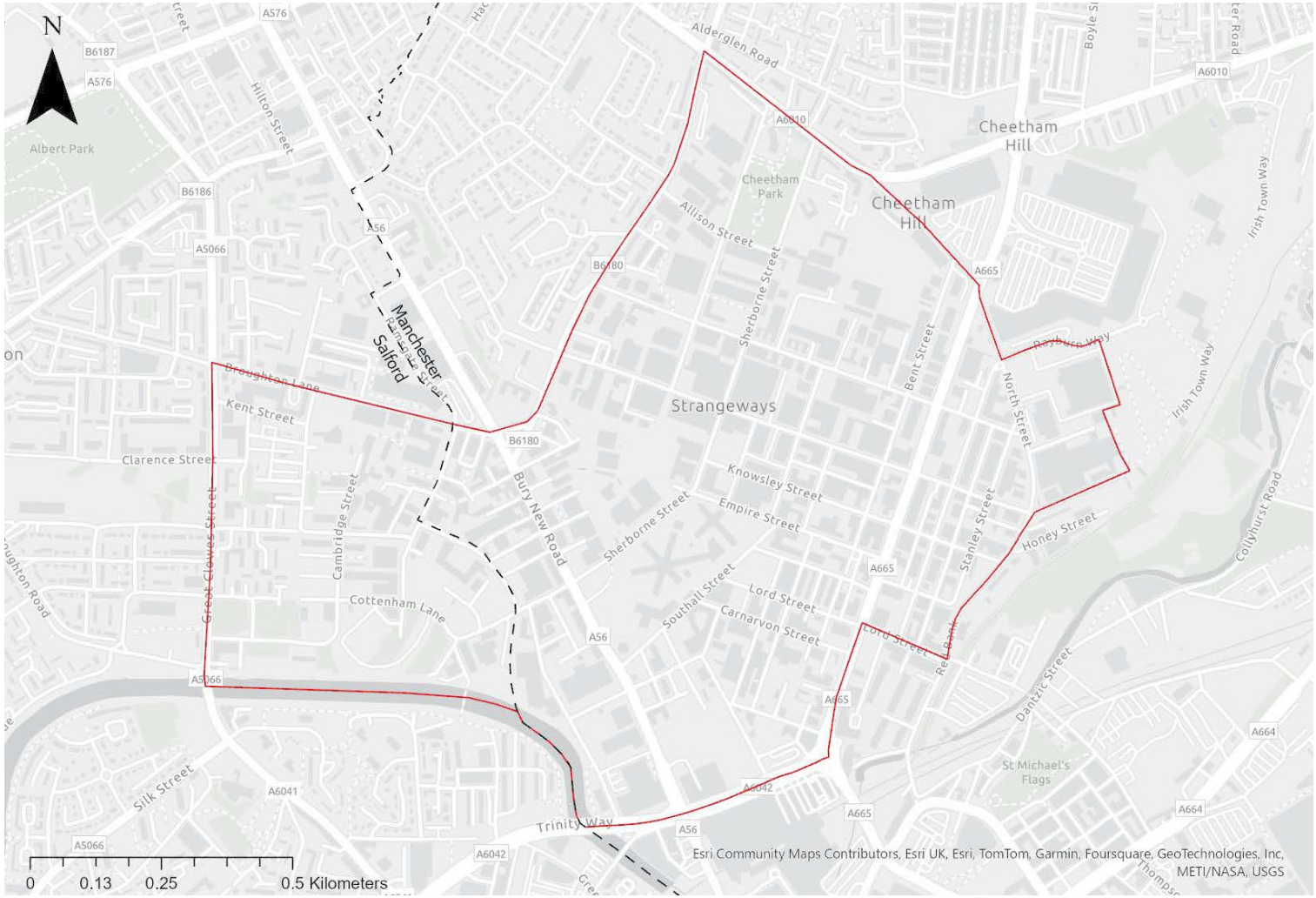
Therefore, despite its history and location, relatively little is known about how the economy of the SRF area operates today. Whilst it is recognised as a location for certain sectors their ongoing contribution to the city economy is unclear. Also, whilst wholesaling has long been the focus new sectors and activities have moved in, yet their scale and reach are yet to be understood.

This Economic Study therefore addresses the current information and evidence gaps relating to the area's economy. Drawing on primary research (including a business survey and desktop data analysis, and supplementing this with observational site surveys, in depth one to one business and stakeholder interviews, and business engagement 'drop in' events) and secondary data, it presents an up to date understanding of the business, demographic, market and sectoral trends within the area.

Understanding the nature and value of the SRF area's economy today is vital if future plans are to appropriately protect and support the continued provision of space for businesses and jobs for residents of the city. This Study therefore provides an important evidence base for the SRF as well as identifying wider 'placemaking' interventions that could be considered to support the area's economy.

Introduction

Study Area Boundary



Previous Analysis of the Area's Economy

The economy of the Strangeways area has been the subject of study before, most notably in a 2015 report prepared by the Centre for Local Economic Studies (CLES) on behalf of Manchester City Council. The Cambridge area was also reviewed by GVA/Avison Young in a 2018 as part of the Cambridge Street Masterplan Framework.

The CLES study was commissioned to guide interventions in the Strangeways area across a 5-10 year time horizon, a period which has now largely passed. It was intended to act as an evidence base for the proposed preparation of a new plan for Strangeways and therefore focused on understanding any growth opportunities.

GVA/Avison Young's 2018 report outlined a vision for the future of the Cambridge area with respect to land use, flood risk, urban design and connectivity. The vison comprised of further residential development combined with an enhanced waterside and park areas.

Some of the key findings of its supporting baseline analysis included:

- Cambridge's urban environment had suffered from neglect and poor legibility;
- Development in the area had been minimal and piecemeal; and
- The urban grain is low density towards the River Irwell.

Source: Manchester City Council and Salford City Council, Map created by Avison Young (2023)

Introduction

CLES Report

The CLES report reviewed relevant policy and strategy documents and analysed socio-economic data supplemented by consultation with local businesses and stakeholders.

The key findings of the analysis of the Strangeways economy were:

- It provided c.5,000 jobs of which 47% were in fashion wholesale and retail;
- That the economy had been relatively static since 2008 (when a similar study had been conducted);
- Whilst wholesale had seen growth no significant new sectors had located there or diversification of activity had occurred;
- Property was well occupied with little vacancy despite some high levels of business 'churn' suggesting the area remained attractive;
- There was some linkage between the resident population and local employment;
- Growth in retail activity was anticipated as wholesale businesses looked to diversify; and
- The presence of the prison was seen to be a potential barrier to success given the impact it had on perceptions of the area.

Overall, the CLES study concluded that the area continued to make a significant contribution to the Manchester economy (albeit this wasn't quantified) and there was potential for future growth if a series of identified barriers could be addressed.

The CLES study identified a series of actions and interventions to support the economy to succeed and grow:

- Create a strong and clear vision for the area;
- Ensure the importance of the business district is embedded into citywide policy;
- Flexibility in local planning;
- Developing a virtual team to focus upon the area's development;
- Development of a public realm strategy;
- Improve the perception of the link to the city centre;
- Formalised representation on the Manchester-China Forum;
- Continued support for the Business Network Forum;
- Develop a strong and recognisable brand for the area;
- Promote the 'Fashion District' through expos and trade fair;
- Provide a single point of access for business and employer engagement plan;
- Encouraging and targeting business support;
- Develop more formalised links to colleges and universities;
- Develop connections and help build capacity of the local textiles industry;
- Bring in more income from business rates to reinvest (more action to be taken in recovering and business rates and ring-fencing revenues from this activity for the business district);
- Promote local apprenticeship schemes to businesses;
- Address issues of illegal undercutting of businesses;
- Utilise Section 106 Agreements;
- Providing more start-up units.

The CLES study provided a useful analysis of conditions and business inter-relationships, drawing on the most up to date information available at the time of publication. However, much of the data is from 2011 Census and 2013 BRES and therefore a significant period of time has passed and its use as an input to the SRF is limited.

Within this Economic Study we seek to provide a similar coverage of information and data to update the baseline analysis as well as deepen the understanding where new information is available . The Economic Study and SRF will also provide an opportunity for both councils to review what actions and interventions might now be appropriate to support the local business base, building on the suggestions of the CLES study. This study is the first which surveys both the Strangeways and Cambridge areas together, which offers an opportunity to take a holistic view of the area.

Due to differences between the statistical boundaries used in the CLES report and this economic study, it is difficult to make meaningful comparisons across the two reports. This economic study makes use of the latest ONS datasets and as such we have relied on these for analysis of historic trends.

Introduction

The focus of the Economic Study is to develop an evidence-based understanding of how the economy of the area is made up and what its future potential could be in order to guide the preparation of the SRF.

To guide the research and analysis the Economic Study seeks to provide answers a set of key questions. These are answered in the Key Findings & Discussion pages of the relevant subsections of this report. These focused answers are then followed by key discussion points.

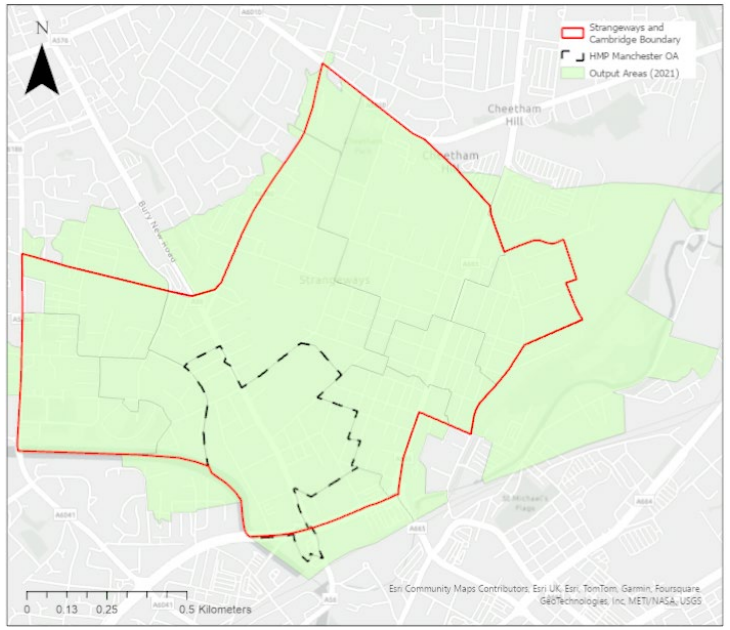
- *Who are the residential community within Strangeways and Cambridge SRF Boundary?*
- *What is the economic contribution of the local business base, and what role does it have in relation to the city centre?*
- *Do businesses make efficient use of space and labour?*
- *How is the local economy dispersed geographically?*
- *What are the key real estate trends which underpin economic activity and will inform the SRF going forward?*

The remaining pages within each subsection are intended to provide visual, data-led analysis, with commentary generally concentrated in the Key Findings & Discussion pages.



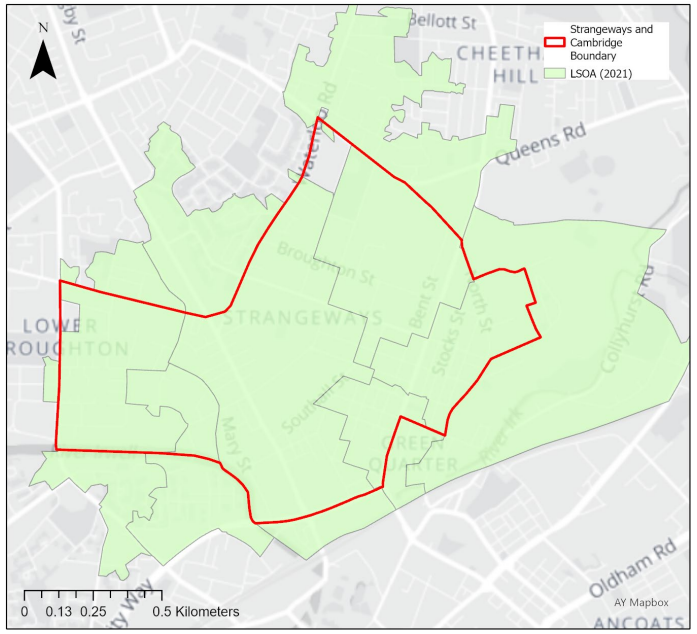
Introduction: Statistical Boundaries

Strangeways and Cambridge OAs (2021)



OAs:
E00028387
E00028388
E00172943
E00175934
E00175935
E00175942
E00175946
E00175948
E00176085
E00180790
E00180922
E00181615

Strangeways and Cambridge LSOAs (2021)



LSOAs:
E01005147
E01033330
E01033655
E01033665
E01033674
E01033987

For the purpose of the socio demographic analysis, we have relied on data from sources such as the Office of National Statistics, Experian, Business Register and Employment Survey and the former Ministry of Housing, Communities and Local Government.

It is necessary to use the data at the lowest spatial scale possible as this allows us to get an accurate representation of the Strangeways and Cambridge area in totality, but also the differences across the SRF boundary. Therefore, where possible we have used data at Output Area (OA) level, the lowest level of geographical area for census statistics and equivalent to a maximum of 250 households. Where data was not available at OA level, we have used Lower Super Output Area (LSOA) data which is equivalent to a maximum of 650 households.

We have also used the most up to date data possible to most accurately reflect the socio-economic conditions within the SRF boundary.

For some of the demographic analysis, we have omitted the HMP Manchester OA area to avoid misrepresenting the usual resident population.

CLES boundaries:

The following boundaries were adopted by CLES in their 2015 report.

For 2011 and 2013 business data, LSOAs:

- E01005147: Manchester 010D
- E01005148: Manchester 010E

For business data at MSOA level:

- E2001054: Manchester 010

For 2011 Census data, LSOAs:

- Manchester 056B
- Manchester 058B
- Manchester 058C
- Manchester 058D

Study Area Context



Policy Review: SRF and Surrounding Area

Great Ducie Street Strategic Regeneration Framework (2018):

- The Great Ducie Street SRF covers the southern section of Strangeways and comprises the northern-most section of the city centre boundary. The SRF identifies an opportunity to build upon the remaining business base of the area, and the adjoining warehousing district to further establish the textiles industry in this area as a national and international significant node, whilst delivering a maximum of 50% residential accommodation (with the balance comprising non-residential uses).
- A new hotel and retail/leisure uses are also proposed so that the SRF area becomes a mixed-use neighbourhood. The proposed distribution of the residential, hotel and retail/leisure uses is proposed to be focused to the south and west of the SRF area (opposite Trinity Way) with commercial uses maintained towards the north of the SRF area.

Former Boddingtons Brewery Strategic Regeneration Framework (2015) and addendum (2019):

- The former Boddingtons Brewery SRF area is the gateway into the wider Strangeways area, encouraging the northwards expansion of the City Centre. The SRF promotes a mixed-use approach to the site, including commercial and residential uses.
- The addendum, published in 2019, set out Manchester College's proposals to build a new city centre campus on the western section of the former Boddington's brewery site.
- The Manchester College campus has now been built on part of the former Boddington's Brewery site (planning application ref. 124995/FO/2019) and works commenced in August 2023 on the Waterhouse Gardens scheme, which is being developed by Salboy (planning application ref. 118831/FO/2018). Planning permission 132416/FO/2021 was granted in June 2022 to Latimer Development for residential development with ground floor commercial uses on the northern section of the Boddington Brewery site.

Salford Local Plan: Development Management Policies and Designations (2023):

- ***Policy EC1:*** The Cambridge area is an existing employment land site. There will be a strong emphasis on protecting and enhancing the economic function of Salford's existing employment areas, helping to provide a wide choice of premises and ensure that a broad range of businesses, including start-ups, can locate in Salford. The following will be encouraged within existing employment areas:
    - The improvement and development of sites and premises for industry and warehousing and other employment-generating uses of a similar nature; and offices of a scale that does not detract from the role of the City Centre, Salford Quays and other designated centres as the primary focus for office activity.
    - The provision of training facilities and similar uses directly connected to employment.
    - Environmental improvements that enhance the appearance and overall quality of the employment area, including addressing issues such as flood risk.
- The following will be supported within existing employment areas where they would not have any significant adverse impact on the overall economic potential or successful functioning of those areas:
    - The provision of sites for travellers where they involve a significant employment function as well as residential accommodation.
    - The provision of community facilities where they cannot be adequately located elsewhere within the local area that they would serve.
- ***Policy WA3:*** Further improvements in flood mitigation in Salford will be supported, potentially including the provision of new open space within the Cambridge area, the raising of river banks and natural flood management measures. New flood risk management infrastructure should incorporate multifunctional green infrastructure where practicable.
- **Policy D9:** Development near to Salford's waterways (including the River Irwell, the Manchester Ship Canal, Salford Quays, the Bridgewater Canal and the Manchester, Bolton and Bury Canal) shall make a positive contribution to their character, environmental quality, public amenity value, and role as key walking and cycling routes.

Irwell City River Park Connectivity and Movement Strategy (emerging, 2024):

- Following the revocation of the Irwell City Park Planning Guidance (2008), Salford City Council are currently undertaking work on a refreshed strategy that focuses on active travel connections along the river and the wider connections into the surrounding areas of Salford. The creation of this strategy will help to ensure that the area becomes a successful and vibrant community and plays its role in the ongoing transformation of City Centre Salford.

Policy Review: Wider Context

The Greater Manchester Strategy 2021-2031:

Sets out a vision for Greater Manchester to be a place where everyone can live a good life, growing up, getting on and growing old in a greener, fairer, more prosperous city region.

Manchester Housing Strategy 2022- 2032:

The Manchester Housing Strategy sets out a long-term vision to deliver the homes that people want and need. It is built around the four following vision principles:

- Increase affordable housing supply and build more new homes for all residents;
- Work to end homelessness and ensure housing is affordable and accessible to all;
- Address inequalities and create neighbourhoods where people want to live;
- Address the sustainability and zero-carbon challenges in new and existing housing.

Salford Housing Strategy 2020-2025:

Sets out a strategy to accommodate Salford's growth in economy and population, its affordability challenges by tackling three priorities:

- Increasing the number of new and affordable homes to address shortfalls;
- Ensuring the city's homes are maintained and improved;
- Supporting all residents through appropriate housing and support;

Greater Manchester's Five-Year Environmental Plan (2019):

Sets out a version for Greater Manchester to be a clean, carbon neutral, climate resilient city region. Identifies key aims to:

- Mitigate climate change
- Improve air quality
- Encourage sustainable consumption and production
- Protect and enhance the natural environment
- Improve climate resilience.

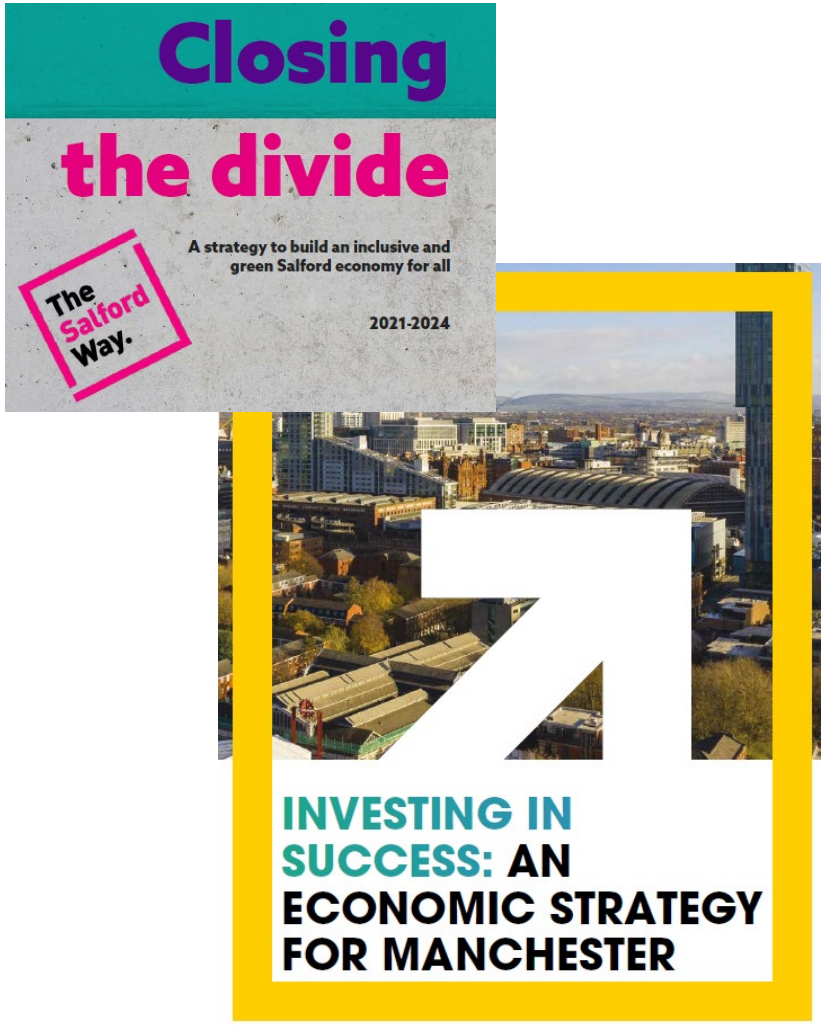
Relevant polices from Places for Everyone (2023):

- ***Policy JP-Strat 1:*** The Strangeways and Cambridge SRF area lies within the Core Growth Area of Places for Everyone. The economic role of the Core Growth Area will be protected and enhanced and complemented by residential development in areas with good connections to employment, training and education facilities.
- ***Policy JP-Strat 2:*** Part of the SRF area lies within the designated City Centre. The City Centre will continue to provide the primary focus for business, retail, leisure, culture and tourism activity in Greater Manchester, but the increasingly important residential role of the City Centre will be expanded.
- ***Policy JP-Strat 5:*** The Cambridge section of the SRF area lies within the designated Inner Area. The continued regeneration of the inner areas will be promoted and will be linked to reducing levels of deprivation and poverty and supporting the improved health and wellbeing of the communities. New development will be predominantly residential and will be integrated with existing communities, enhancing the quality of places and their local character.
- ***Police JP-G 3:*** River valleys and waterways will be protected and improved as central components of our Green Infrastructure Network and a vital part of a Nature Recovery Network, making a major contribution to local identity, quality of life and the natural environment.

Relevant policies from Manchester Core Strategy 2012:

- ***Policy EC1:*** Strangeways is identified as a key location for major employment growth. The City Centre Fringe (which includes Strangeways, Collyhurst, Ancoats, New Islington and Manchester Science Park) is allocated for 25ha of employment floorspace between 2010 and 2027.
- ***Policy EC2:*** Existing employment space and sites will be retained and enhanced. Strangeways is identified as an Employment Area.
- ***Policy CC1:*** Strangeways is identified as being within the City Centre Fringe. Strangeways is identified as a suitable location for the consideration of high-density buildings and commercially led mixed use schemes. The focus for employment growth will be for high density offices.
- ***Policy CC9:*** Development should preserve or enhance the heritage assets that have been identified, including listed buildings, conservation areas and scheduled ancient monuments.
- ***Policy EC4:*** North Manchester is expected to provide approximately 14ha of employment land with Strangeways being identified as a suitable location for office led mixed use development as well as retention and growth of general industry, warehousing and distribution.

Policy Review: Economic Strategies



Investing in Success: An Economic Strategy for Manchester (2023):

The 2023 Economic Strategy for Manchester sets out how the city will achieve economic growth over the coming years. The strategy outlines the city's aim to create an economy which is thriving and performing as well as the best international comparators; creates great opportunities and increases social mobility for residents; attracts the best of global business and talent; is resilient to future shocks and a changing climate; capitalises on the opportunities created by the transition to zero-carbon. It outlines five key priorities to achieve these aims:

- **Use investment and development to drive growth**, particularly in protecting the commercial function and expanding the size of the city centre with high density commercial and residential space.
- **Nurture productive and innovative business sectors** through incentives and other support.
- **Develop world-class infrastructure, places and talent** to enable growth, both through connecting existing highly-skilled workers to opportunities and growing the city's overall talent pool.
- **Transition to a zero-carbon and resilient economy** by developing a Manchester standard for net-zero construction and a climate change risk assessment.
- **Include more people in economy** opportunity by connecting new investors and businesses into the city's support networks and creating economic development plans to support regenerated areas.

Salford Way Inclusive and Green Economic Strategy (2021)

Sets a vision for a fair and more inclusive local economy that delivers greater social and environmental justice, where wealth is shared mor widely across the community, outlined in a five point plan:

- **Building community wealth** through a progressive procurement and commissioning of goods and services to harness local economic spending, as well as measures to support employment and training and neighbourhood centres.
- **Growing the social economy** by championing alternative business models that widen ownership of the local economy and securing further investment for the voluntary sector.
- **Accelerating the transition to a zero-carbon economy** by making continued investments in green infrastructure, accelerating the shift to sustainable low carbon transport, and supporting businesses, schools and training providers.
- **Strengthening public services** by bringing more services in-house and campaigning for better central government funding.
- **Strengthening civic participation and local democracy**.

Regional Economic Context

New Bailey & Salford Central

Key emerging business and residential locations.

Salford Crescent

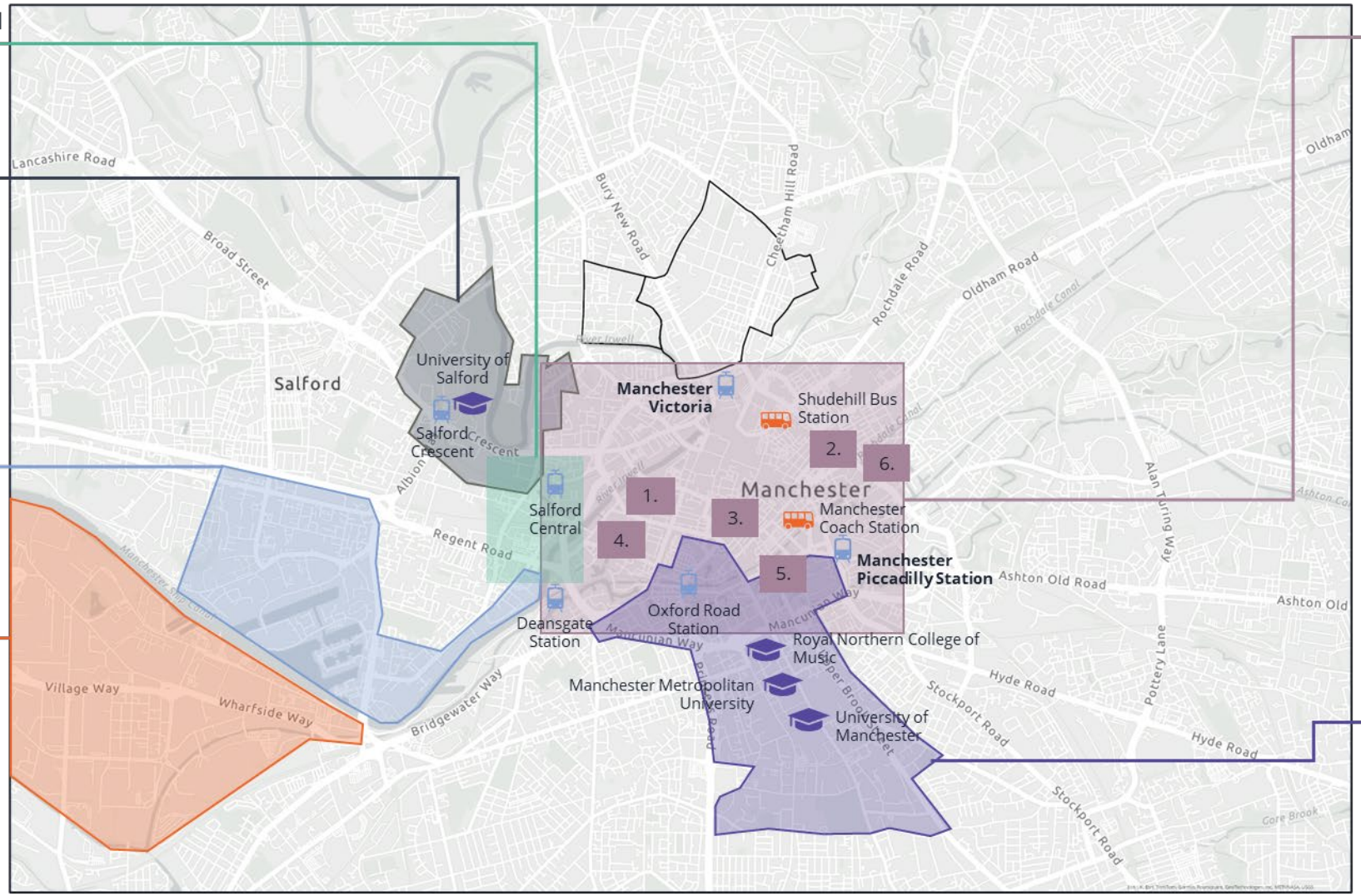
The regeneration plan aims to transform Salford and provide mixed use development, improved transportation, greenspaces and amenities.

Salford Quays

MediaCityUK has created a thriving digital media hub in Salford Quays. It is home to around 250 creative, broadcasting and digital media industries.

Trafford Park

Trafford is a globally recognised industrial hub. Approximately 1,330 businesses and 35,000 employees are based in Trafford Park. It is a centre for the manufacturing, logistics and distribution sectors.



City Centre

1. **Spinningfields:** business district primarily for financial and professional services.
2. **Ancoats and Northern Quarter:** Development has encouraged the growth of creative businesses, music and arts, design, hospitality and retail.
3. **Core:** The major hub of professional services, as well as the Town Hall and Central Library.
4. **Enterprise City:** A tech and media creative cluster home to creative startups and production studios.
5. **Sister:** Emerging innovation hub.
6. **Central Retail Park:** Future civil service digital hub.

Oxford Road Corridor

Knowledge and education quarter, home to life sciences, advanced materials and tech sectors; proximate to the University of Manchester and Manchester Metropolitan University.

Demography + Population



Demography + Population

This section sets out the demographic profile of the Strangeways & Cambridge SRF area and seeks to answer the question:

"Who are the residential community within Strangeways and Cambridge SRF Boundary?"

This demographic analysis supports the Economy and Business Community section of the study. The SRF area has developed over the past century as a mixed and relatively transient community. Whilst today its residential population is much smaller than its workplace-based employment, its economic function has emerged in the context of its demography.

An understanding of the area's demography also informs our approach to the SRF in general, and especially our consultation strategy.

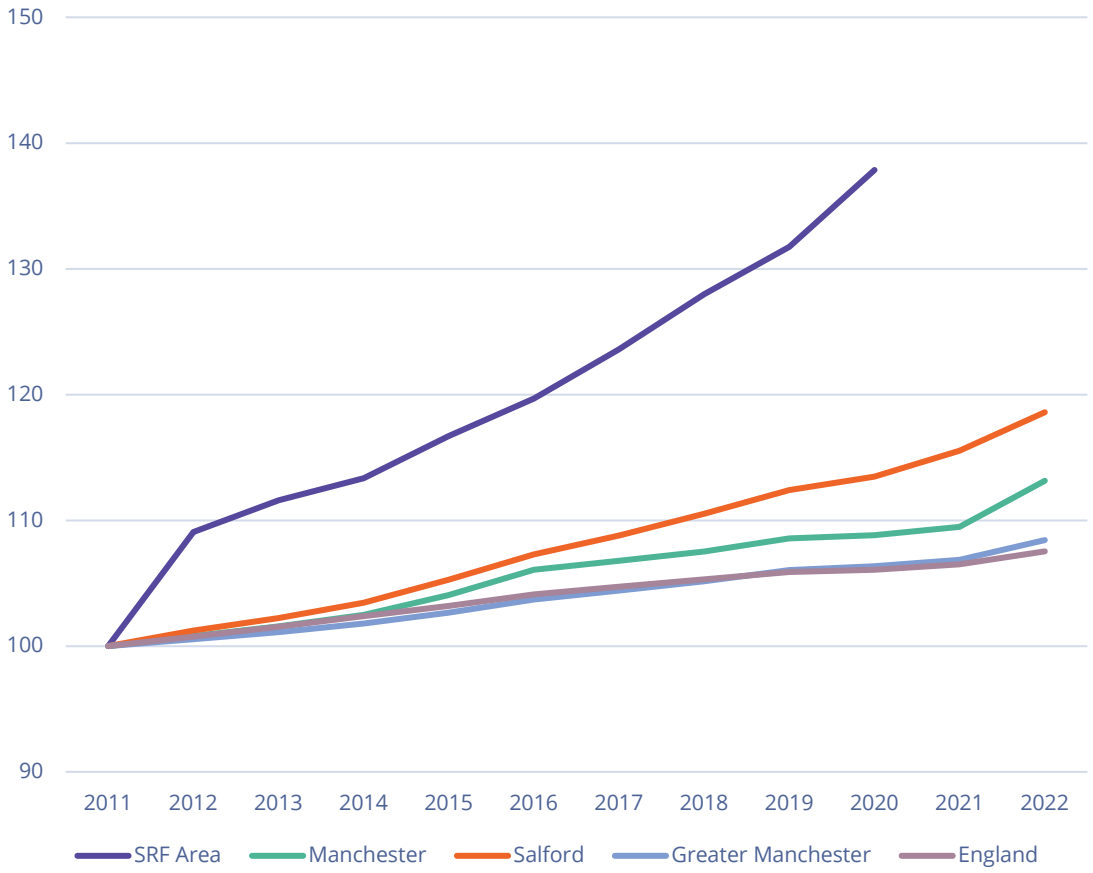
This analysis is limited by the fact that most official demographic statistics in general do not take account of the working or visiting population of a given area. These communities are important drivers of a place's function and identity, and we have therefore sought to capture this influence in commentary in the Economy and Business Community section of this study.

As noted on p11 above, the figures in this section have been produced within the limitations of the ONS data available and as applied to the red line boundary of the SRF area.

Population

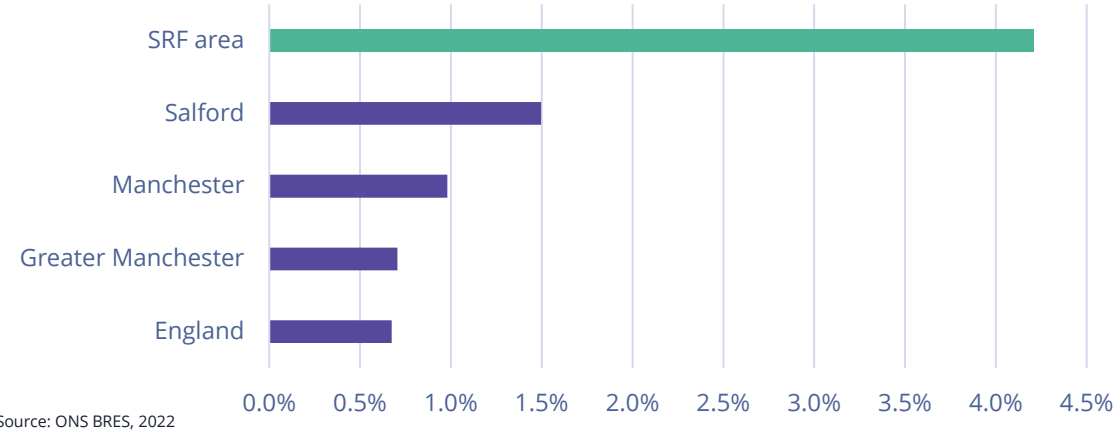
Population growth, indexed 2011 = 100

Latest data available for SRF area at small geographies is 2020



Source: ONS, 2020 and 2023

Average annual population growth, 2011-2020



Source: ONS BRES, 2022

Total population: 2,092*

- In general, the area is of low population density, with the primary residential areas are concentrated in Salford at the Salix Homes and Showmen's Guild sites.
- The SRF boundary is surrounded by denser areas, except to the east where development at Red Bank will soon be coming forward.

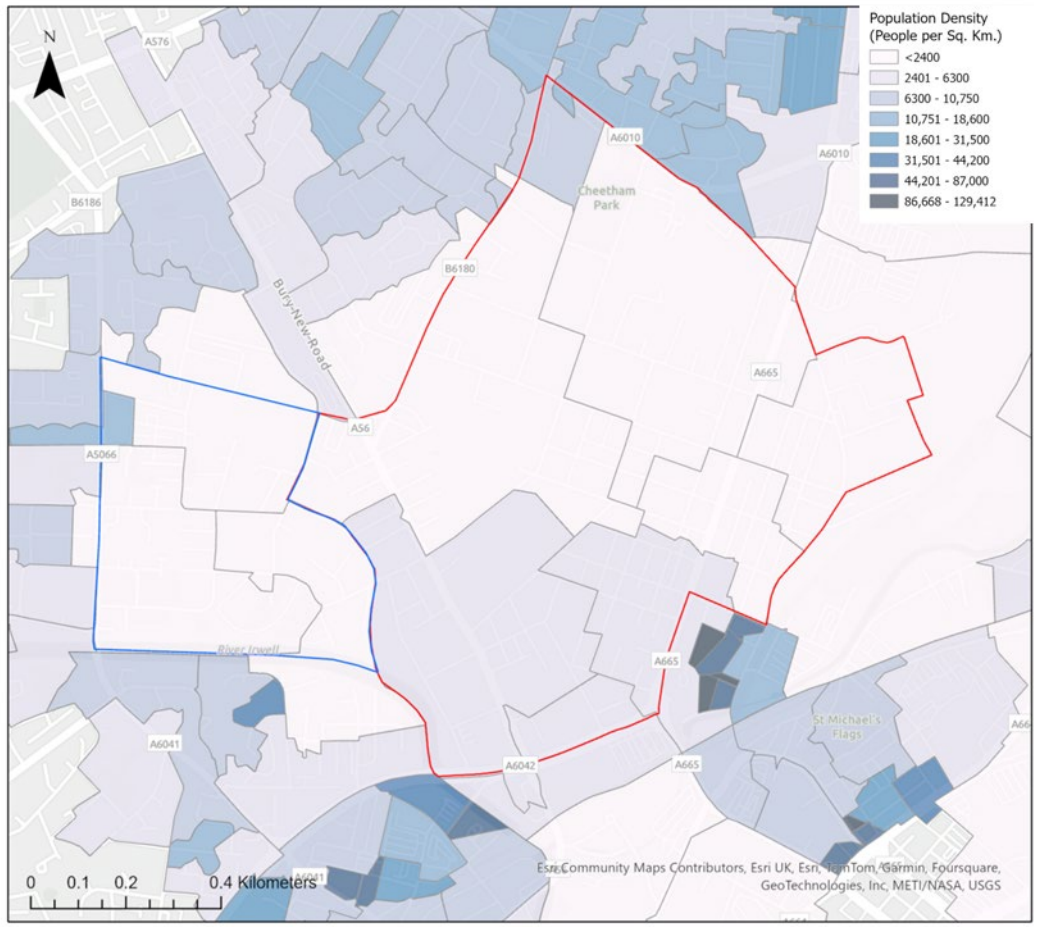
Population growth:

- The area has seen stronger than average population growth than Greater Manchester, Manchester and Salford since 2011. However, the SRF's 4.2% rate of growth pales in comparison to the city centre's average 9% growth over the same period.
- The growth in the SRF area has been from a relatively low base and the area remains of lower population density than surrounding areas.
- Furthermore, the statistical boundaries used in this study capture some peripheral areas of the SRF boundary where population growth has been exceptionally high and hence skews the average.
- In much of the Cambridge part of the SRF area population growth has been static as development has been held back by flooding concerns.

**ONS data adjusted by subtracting an estimated population which fall within the defined statistical boundaries but outside the SRF boundary. This is based on a count of dwellings multiplied by 2.4 persons per household. This also excludes the Output Area which HMP Manchester sits within.*

Population

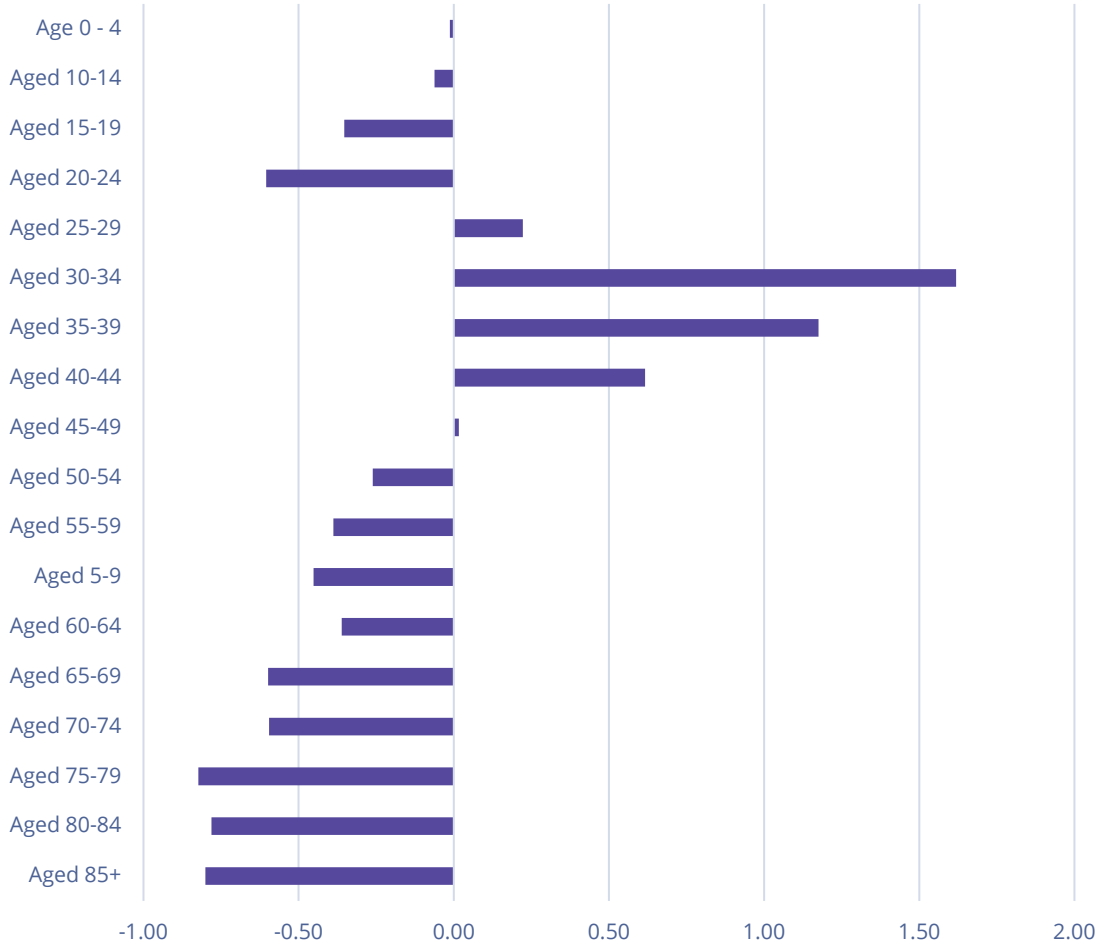
Population Density, 2022



Source: ONS, 2022. Maps produced by Avison Young.

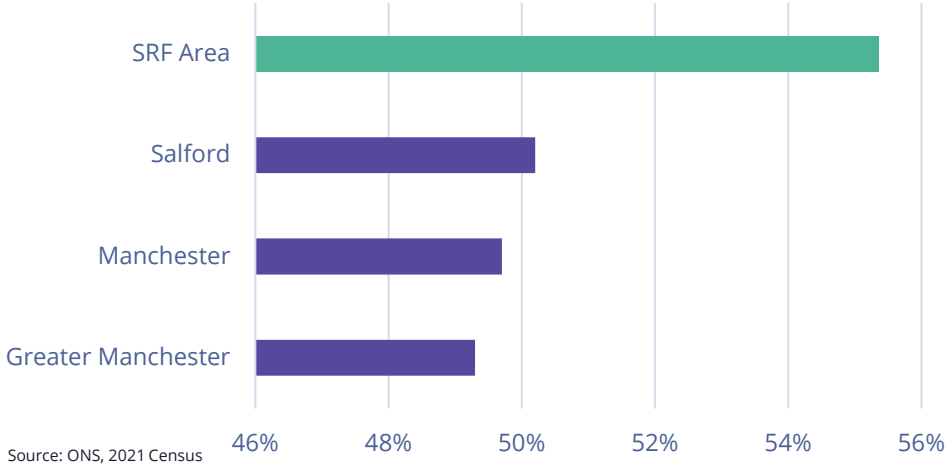
Age and Gender

SRF age profile, relative to Greater Manchester



Source: ONS, 2021 Census

Shares of population which are male



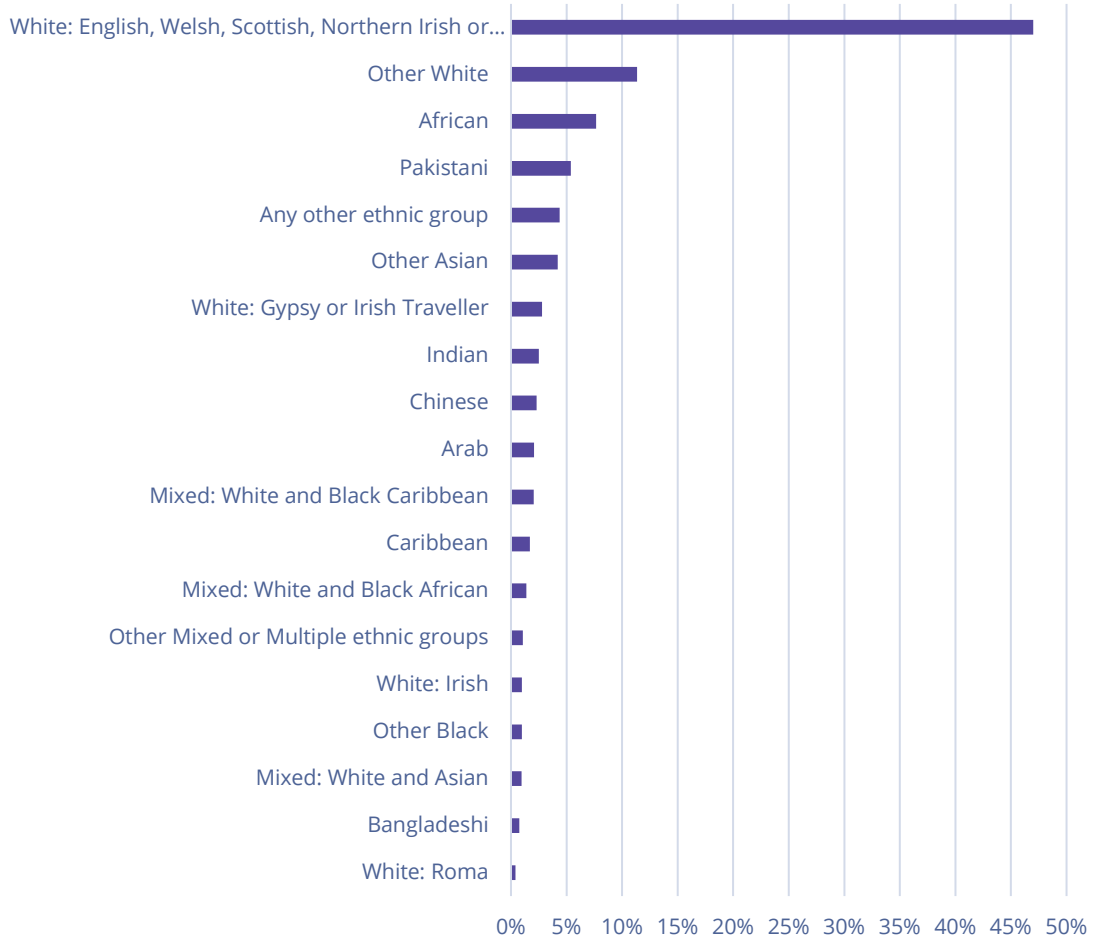
Source: ONS, 2021 Census

Age and gender:

- The population of the SRF area is predominantly of younger/middle working age: age groups between 32-44 are overrepresented by between **22%** and **162%** compared to the Greater Manchester average.
- This suggests there is a significant population of working age people who live within the Strangeways and Cambridge area.
- There are however far fewer than average young people (below 24) living in the SRF area, which indicates that there are fewer families than the Greater Manchester average.
- The SRF area also has a larger share of male population compared to Greater Manchester and other areas, at **55%.** This is despite the removal of the HMP Manchester OA which skews the data even further.
- Anecdotally, Salix Homes have reported that the population living in their accommodation within the boundary has become younger in recent years with more residents working in the city centre.

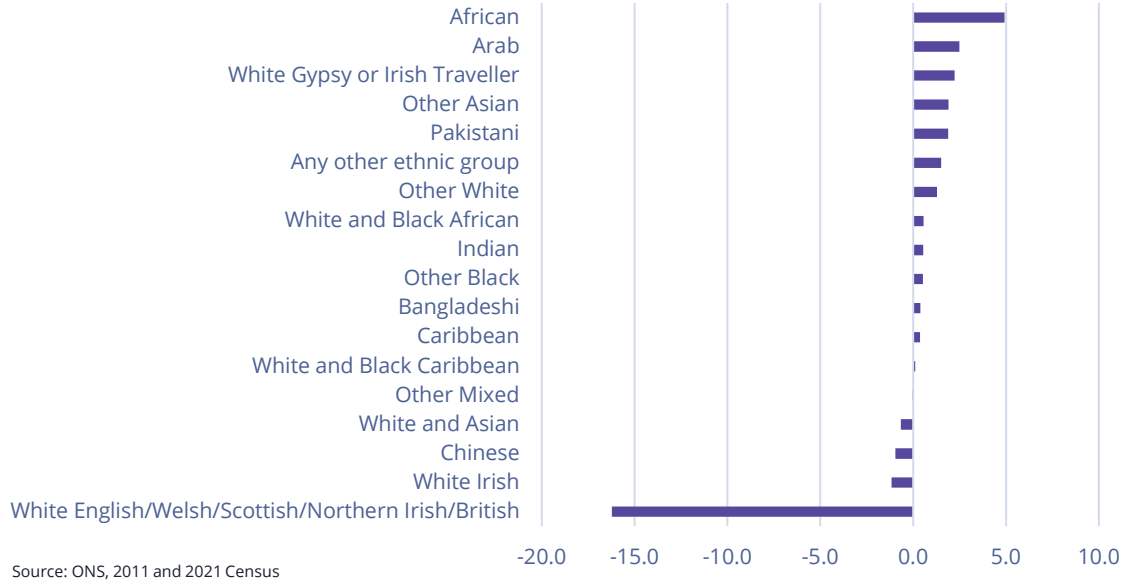
Ethnicity

Ethnic groups share in SRF area



Source: ONS, 2021 Census

Change in shares of ethnicity, 2011 – 2021, percentage points



Source: ONS, 2011 and 2021 Census

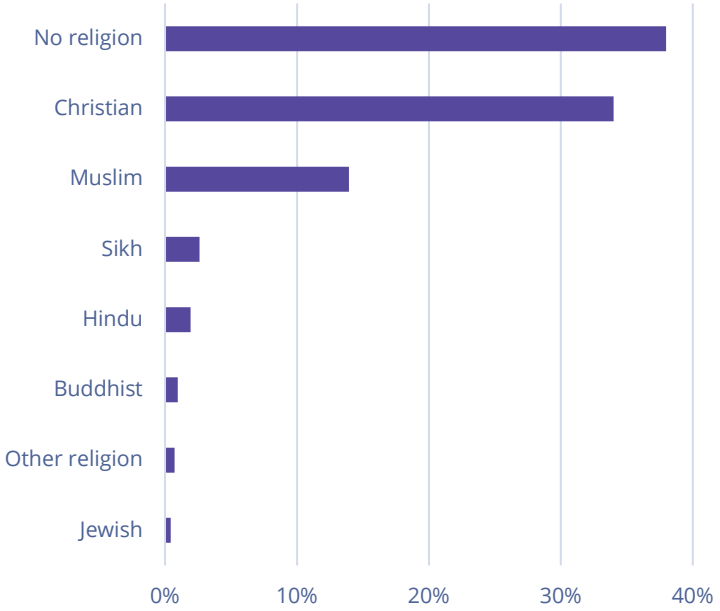
Ethnicity:

- The ethnic group with the greatest share of the population is White English, Welsh, Scottish, Northern Irish or British **(47%)**, followed by Other White **(11%).**
- The most overrepresented ethnic group in the area compared to the Greater Manchester average is White Gypsy or Irish Traveller* (**by 27x**), followed by White Roma, and Other Asian. It appears likely that the area's Showmen's Guild communities have been included within the former group, although we recognise the important cultural distinctions between different elements of this community.
- The groups which have seen the greatest increases between the 2011 and 2021 censuses are African, Arab and White Gypsy or Irish Traveller. Conversely, White English/Welsh' has seen the greatest decline in its share of the population.
- Strangeways and Cambridge has a long history of transient populations, having supported an array of different ethnic groups throughout history.

***NB:** this analysis refers to ONS ethnicity definitions only.

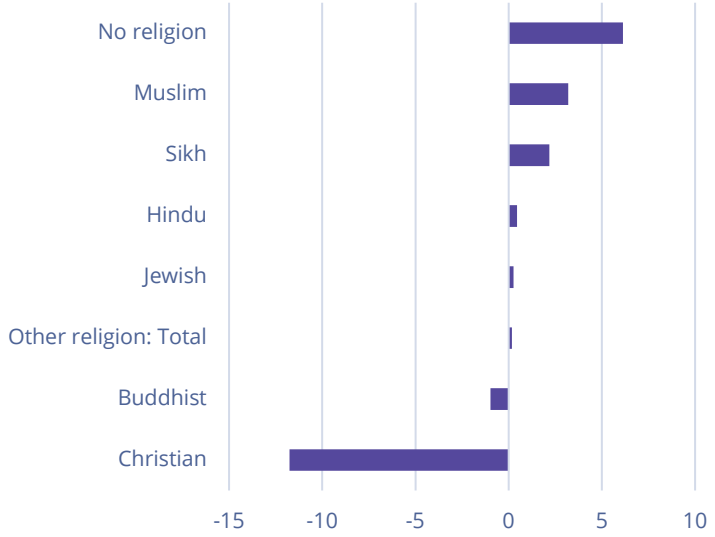
Religion & Language

Religious identification within the SRF boundary, 2021



Source: ONS, 2021 Census

Change in religious identification within the SRF boundary, 2011 – 2021



Source: ONS, 2021 Census

Percentage of households who speak English as a main language

Scale adjusted



Source: ONS, 2021 Census

Religion:

- The largest religious groups in the area are Christian, Muslim, and Sikh. There is also a large share of the area which have no religion, which has increased since the 2011 census (**38%**).
- The religious groups which have increased the most between the 2011 and 2021 censuses are Muslim (**+3.2%**) and Sikh (**+2.1%**) with the Christian population falling significantly (**-12%**).
- Although not available in census data for small level geographies, Strangeways within the 20th Century was home to a significant Jewish community which has since declined. This is represented in much of the cultural heritage in the area and much of the Jewish community has now moved further north to areas such as Prestwich and Whitefield.

Language:

- **73%** of households speak English as their main language, much lower than the Greater Manchester average of 89%.
- This reflects the diversity of the area with it being note that Afghans, Syrians, Iranians and Kurds, families from Pakistan and Bangladesh, Ukrainians fleeing the war with Russia, all help make Cheetham Hill one of the most diverse places in the UK.*

* Source: https://www.manchestereveningnews.co.uk/news/greater-manchester-news/hightown-cheetham-hill-history-manchester-27336235

Crime and Operation Vulcan

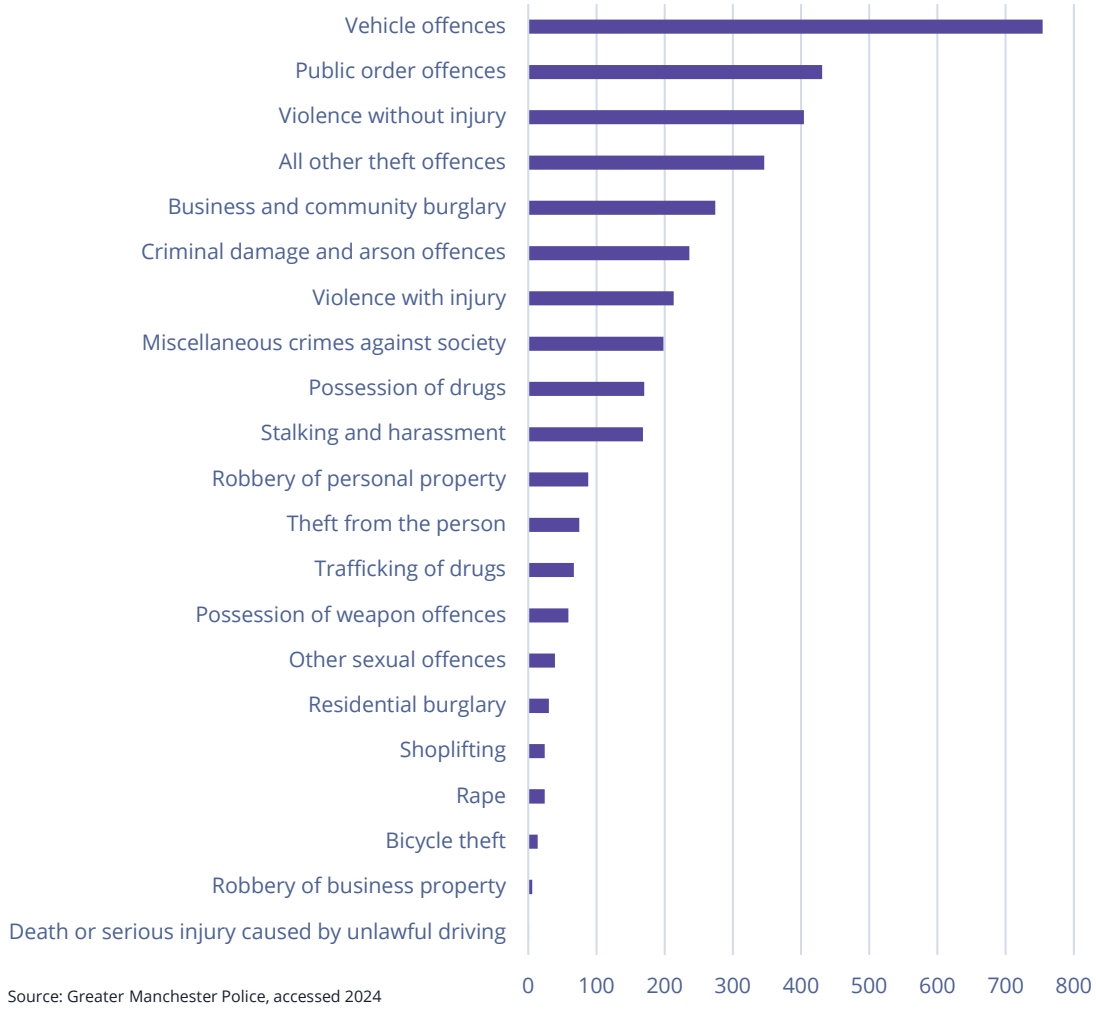
Operation Vulcan:

- In autumn 2022, Greater Manchester Police launched Operation Vulcan to clear counterfeit goods trade and associated organised crime from the SRF area.
- Since then, over 200 counterfeit shops shut down, over 1,000 tonnes of counterfeit items repurposed and recycled, £520,000 cash seized, and violent crime and public order offences reduced by 50%.
- Operation Vulcan is following the Government strategy of “Clear, Hold, Build”. Following the successful 'clearing' of the widespread criminality , the current phase is to "hold" and keep such activity out of the area. Ultimately the SRF will guide the “build” phase, with the intention of creating successful, sustainable and safe place.
- Parts of the SRF area were formerly well-known across the UK as a hub for fake designer goods trade. The trade in counterfeit goods was estimated by National Trading Standards to be worth £8.6 billion per year, with the area of Cheetham Hill believed to be linked to almost 50% of this trade.

Statistical analysis of criminal activity in the SRF area:

- The most common crimes committed in the SRF area over 2021-2023 were vehicle offences, public order offence and violence without injury. The former saw **754 offences** over the period, almost double the next most prevalent type.
- Over the period 2021-2023, Greater Manchester Police noted a **falling share of victim-based-crime** in the area and a corresponding increase in ‘other’ crime due to increased enforcement in the area including Operation Vulcan.

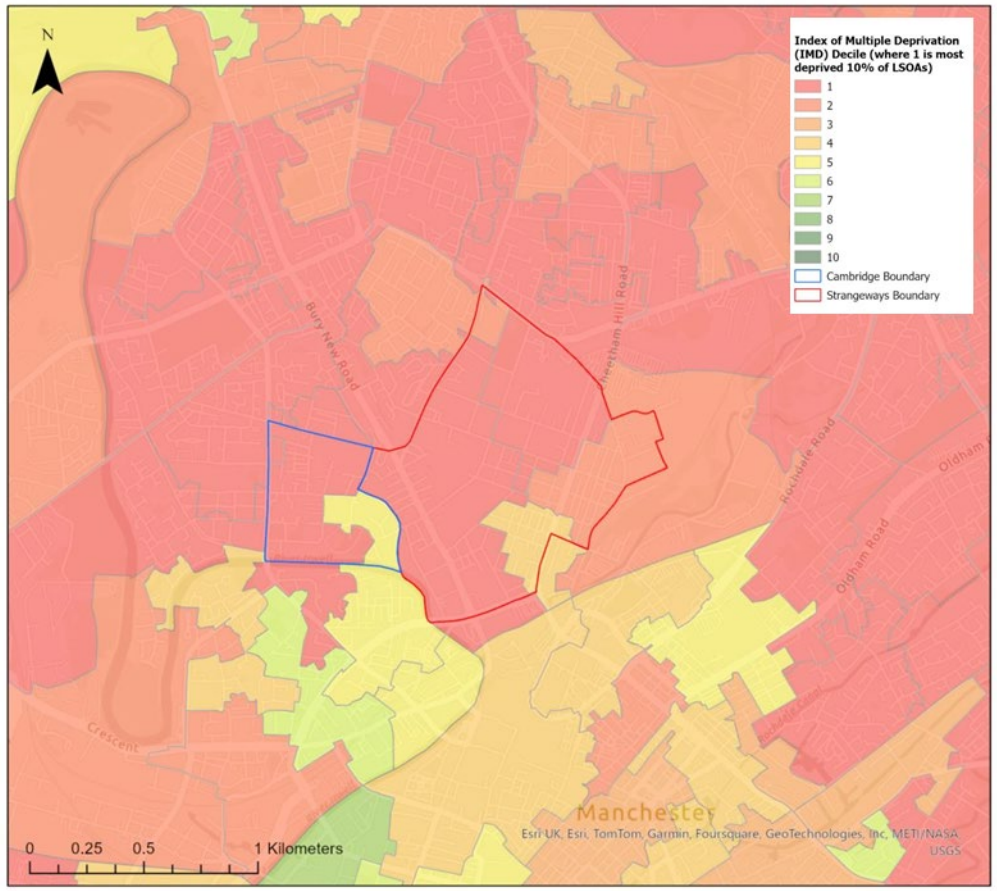
Most Prevalent Crimes in the SRF Area, 2021-2023



Source: Greater Manchester Police, accessed 2024

Deprivation

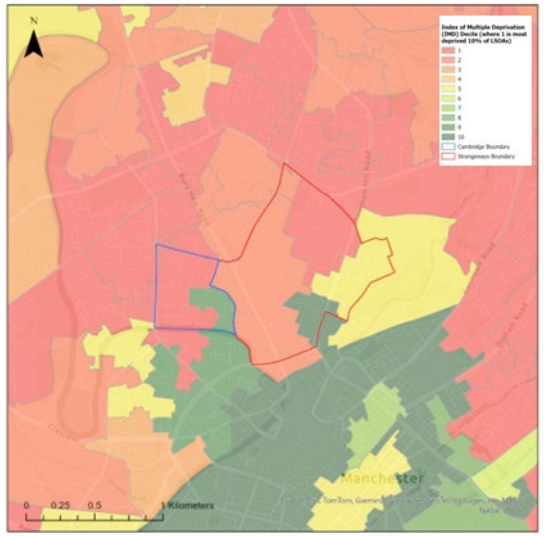
Index of Multiple Deprivation, 2019



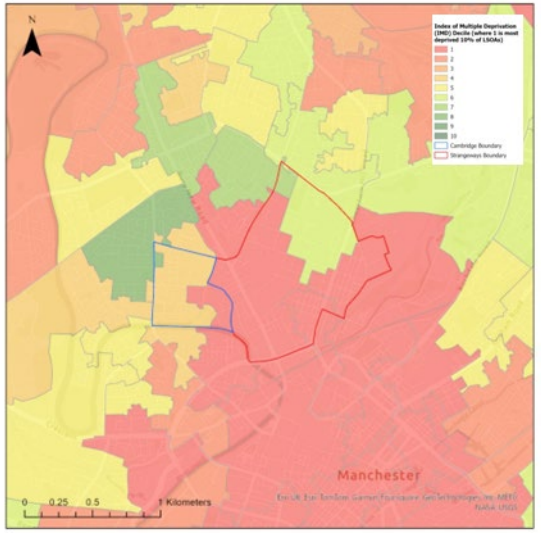
Source: MHCLG, 2019

Drivers of Deprivation, 2019

Income



Living Environment

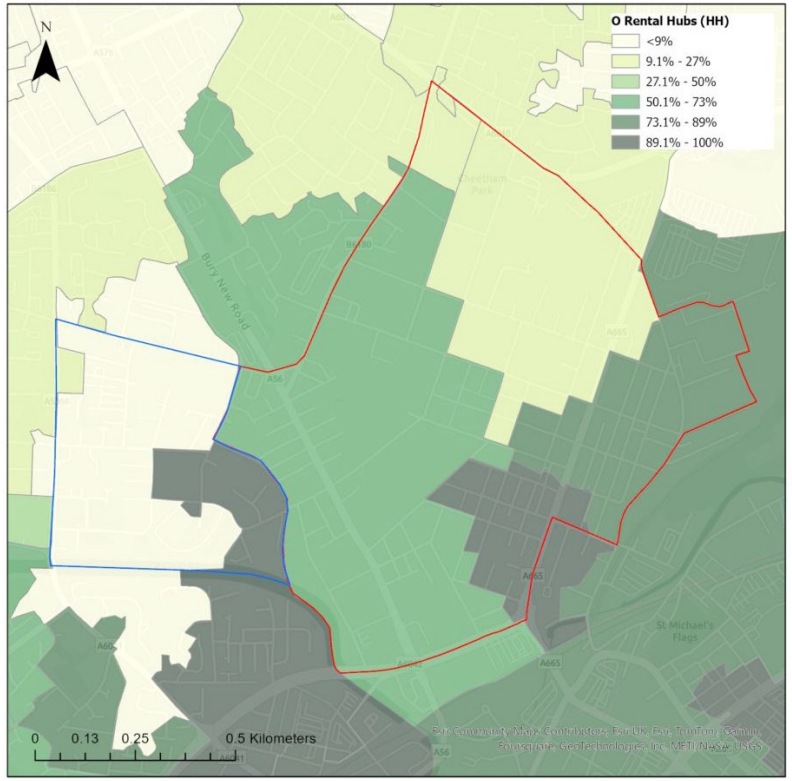


Deprivation:

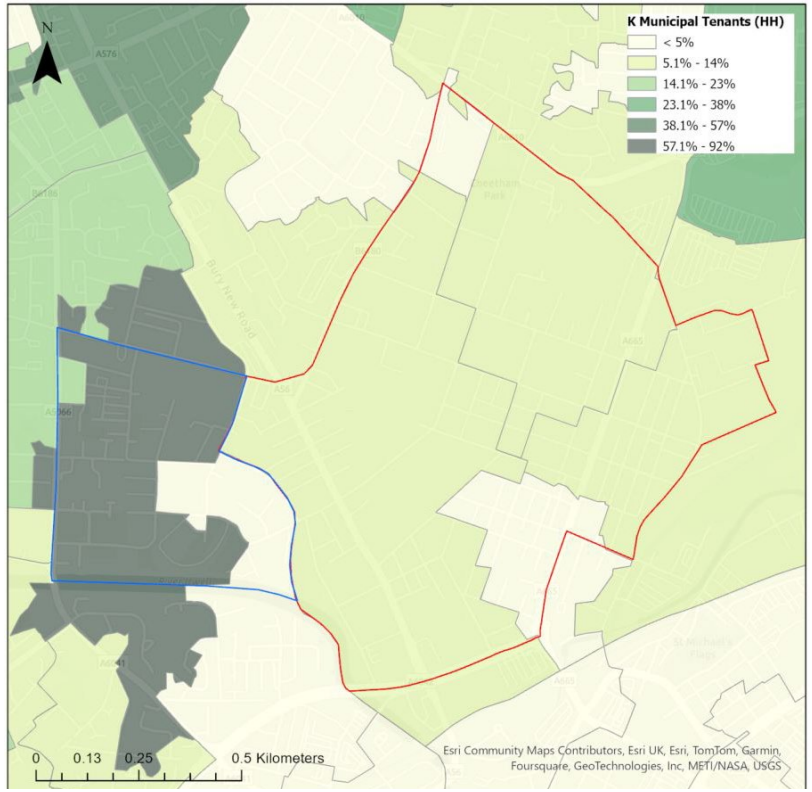
- Index of Multiple Deprivation (IMD) measures the relative deprivation at small area level based on seven different facets of deprivation: income, employment, education and skills, health, crime, barriers to houses and services and living environment deprivation.
- The IMD shows that the majority of the SRF boundary is within the **20% most deprived** areas of the country. It also shows that the neighbourhoods to the north of the boundary are also characterised by similar levels of deprivation but the communities to the south, closer to Manchester City Centre have lower levels of deprivation
- When considering income levels across the boundary, the majority of the study area have residents on low levels of income with higher levels of income seen with residents closer to the city centre.
- The living environment deprivation domain measures the quality of the housing and the quality of the of the outdoor environment, including air quality. This shows that much of the Strangeways and Cambridge area has low living quality although this is replicated across much of Manchester city centre to the south.

Mosaic Consumer Classification

Rental Hubs



Municipal Tenants



Mosaic Consumer Classification

Mosaic is a classification system which assesses the population into different groups based on similar behaviours. This page highlights some of the key groups located within the SRF area.

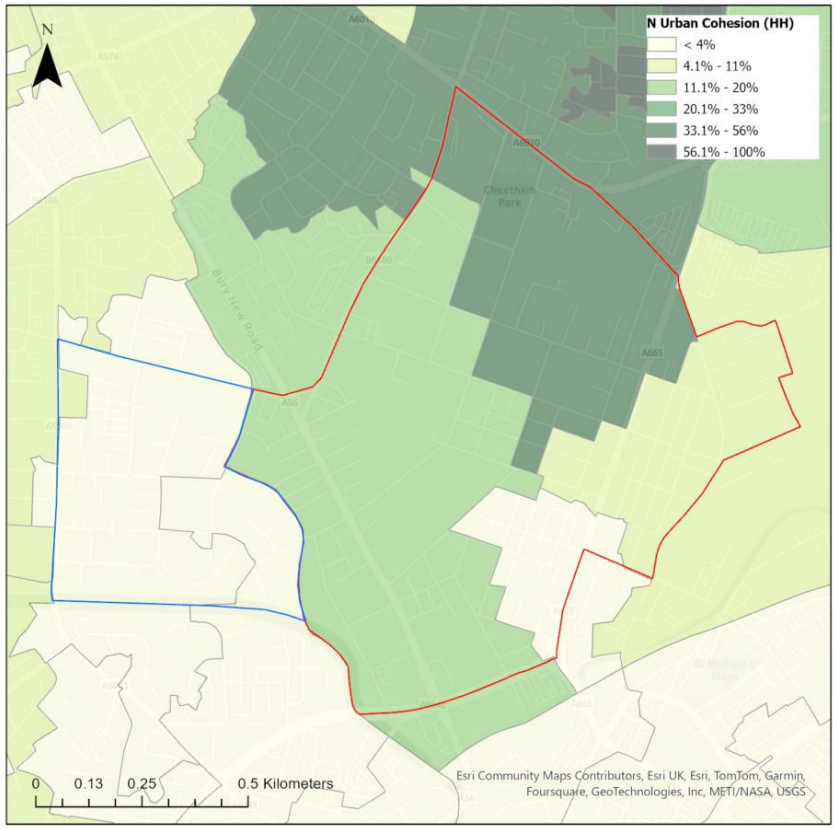
- **Rental Hubs:** this refers to predominantly single, working age residents, often who are highly educated and who are living in private rental accommodation. This is primarily located in the south of the SRF boundary, within closest proximity to Manchester city centre with this group makes between **70 – 90%** of the total residential population. With high density development such as those within the proposed Boddington Brewery and Ducie Street SRFs, it is likely that these groups will continue to grow in the areas closest to the city centre.

- **Municipal Tenants:** this group refers to long-term social renters who are living in low value properties. This mainly corresponds to the known affordable housing areas within the Cambridge area of the SRF boundary (making up c. **two-thirds** of the total residential population in this area).

Source: Experian, 2024

Mosaic Consumer Classification

Urban Cohesion

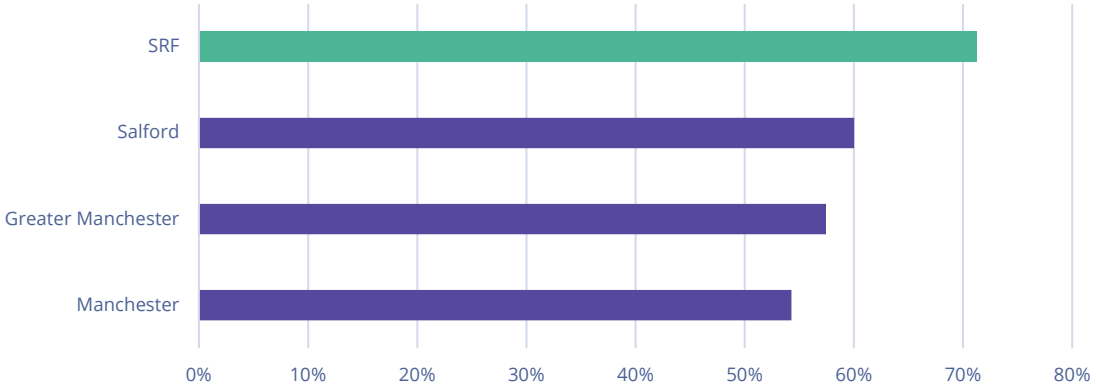


- **Urban Cohesion:** this group refers to residents of a settled urban community who have a strong, multi-cultural neighbourhood. This is mainly noted in the north east of the SRF boundary and blends into Cheetham Hill to the north of the area.

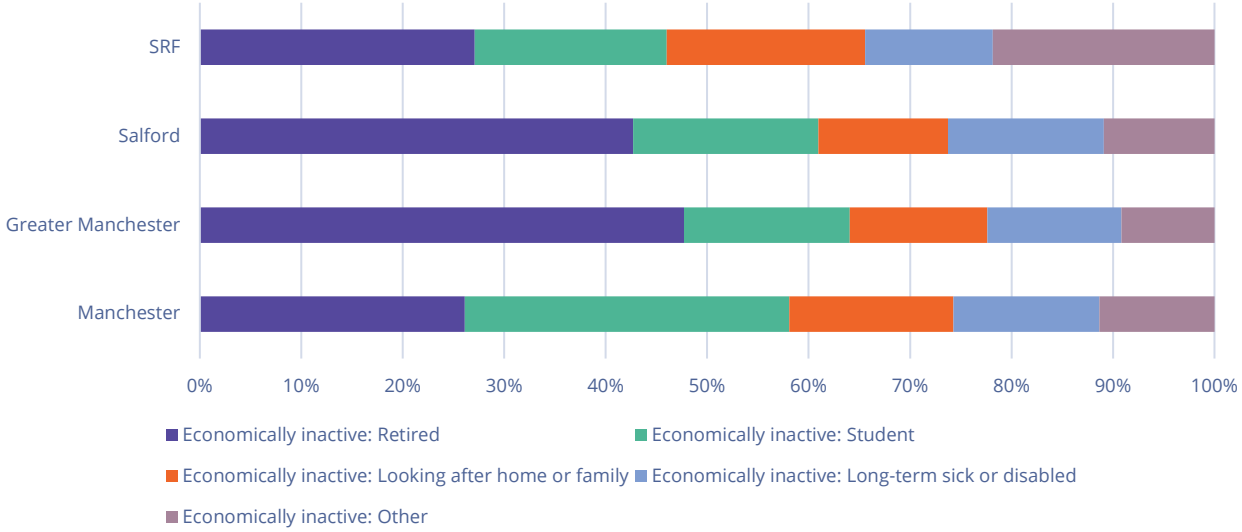
Source: Experian, 2024

Resident-Based Economic Activity

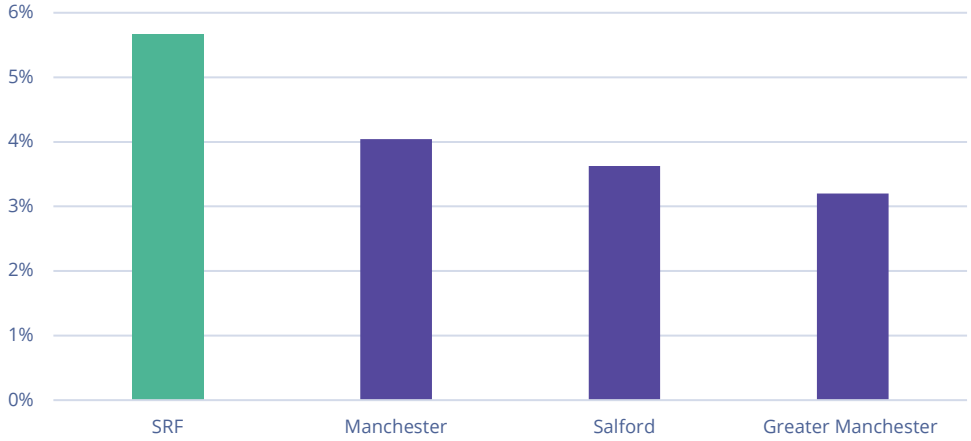
Economic Activity, 2021



Economic Inactivity By Reason, 2021



Unemployment, 2021



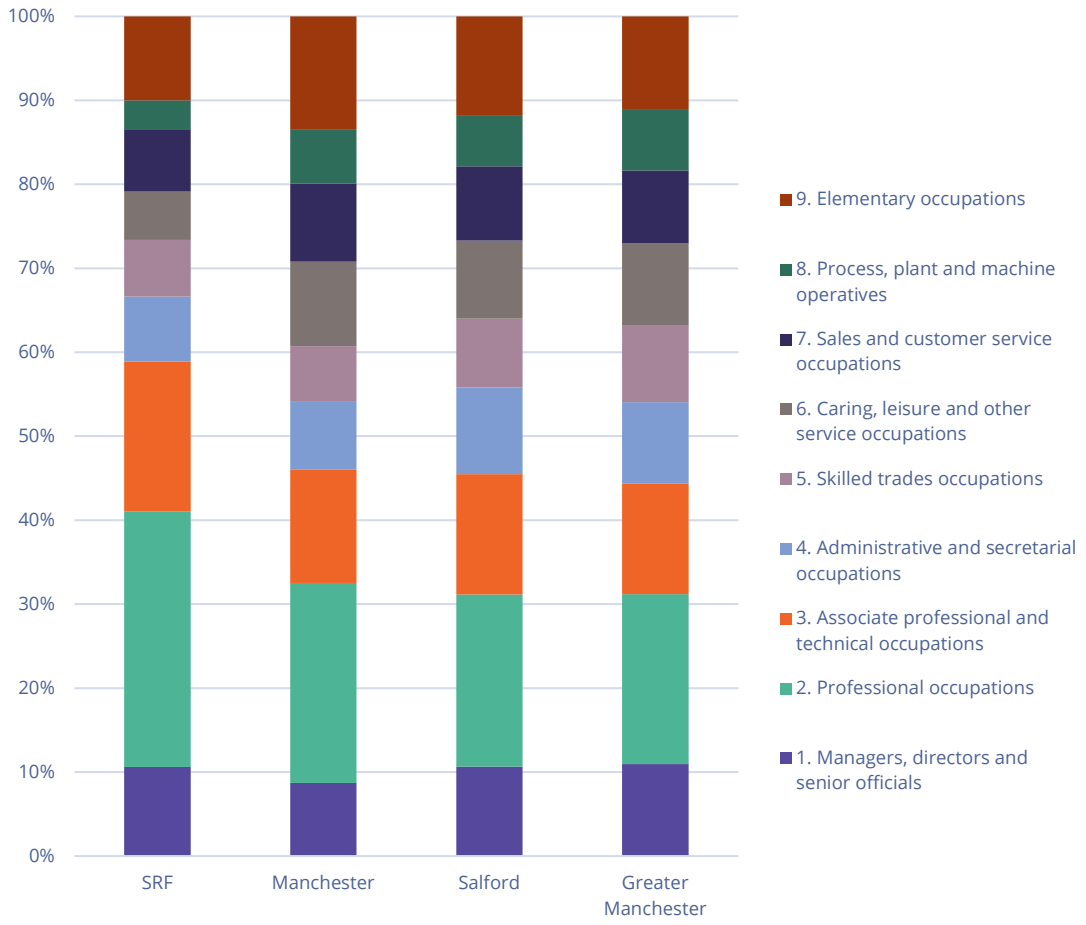
Source: ONS, 2021 Census

Economic Activity

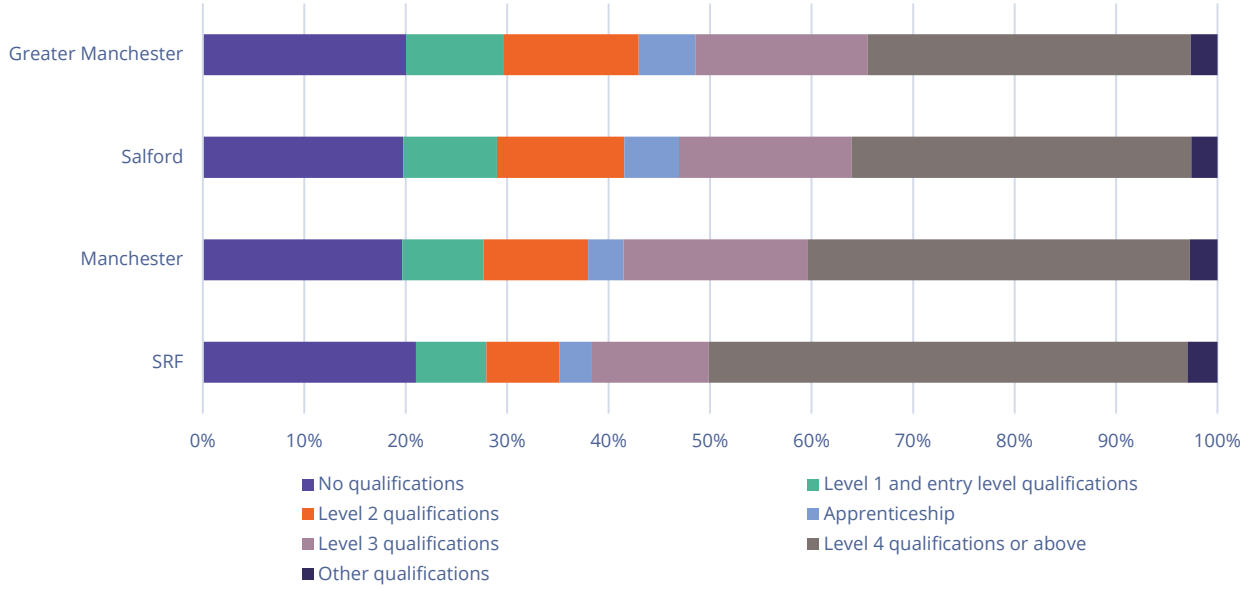
- The area has significantly higher economic activity than Manchester and Salford, although it does have a slightly higher rate of unemployment (which is included within 'economically active').
- The SRF area has a similar mix of reasons for economic activity compared to Manchester, but has a lower share of retirees (**27%**) compared to Greater Manchester and Salford, which emphasises the area's significance as an employment location.

Resident-Based Employment by Occupation

Employment by Occupation, 2021



Highest Level of Qualification, 2021



Source: ONS, 2021 Census

Occupation and Qualifications

- The SRF area has similar share of its population which are managers, directors and senior officials (**11%**), higher levels of professional occupations (**30%**), and also associate professionals (**18%**).
- Similarly, the SRF area has a higher share of those with Level 4 qualifications and above (**47%**). This is likely driven by the area's relatively high economic activity.

Resident-Based Employment by Industry

SRF Area Employment by Industry for SRF area, 2021 (resident-based)



Source: ONS, 2021 Census

Employment by Industry:

- The most prevalent sectors for employment in the SRF area are wholesale and retail trade (including motor trades) at **16%**, followed by health and social work (**13%**) and professional, scientific and technical employment (**12%**).
- This is contextualised against total employment of the workplace population later in this baseline, of which wholesale and retail is a far more dominant employment sector. This suggests that employees are commuting into the area for wholesale and retail employment, whilst local residents are employed in a broader range of sectors, albeit with a strong correlation between local jobs provision and resident employment in the wholesale sector.
- Health and social care in particular stands out, given the limited workplace-based employment. North Manchester General Hospital is located 3.5km to the north of the SRF boundary, which suggests the area likely provides affordable housing options for those working in healthcare and the care sector.

Demography Key Findings & Discussion

Key question: Who are the residential community within Strangeways and Cambridge SRF Boundary?

- The existing residential community within the SRF boundary is very small, amounting to 2,092 people, plus c. 800 residents of HM Prison Manchester *. The local population is housed in a total of 1,361 dwellings.
- The population of the area has grown since 2011, with an annual average increase of 4.2%, higher than the Manchester, Salford and Greater Manchester averages, but half the rate of nearby Manchester city centre. Higher than average population growth is noted in all areas of the SRF boundary and especially in the southern extent of the area, indicating the area's emerging residential market adjacent to Manchester city centre.
- The population is predominantly comprised of the young, working population which is also reflected in the high levels of economic activity in the area. This young population also have high levels of education, with higher than average proportion of the population with Level 4 and above qualifications. The data also suggests relatively high numbers of highly skilled professionals living within the boundary.
- It is particularly noted the lack of retired community in the area, significantly lower than the Greater Manchester average, and also the lack of young families. This may reflect the lack of community facilities in the area e.g. primary schools and doctors surgeries. This lack of facilities is driven by the area's development as a primarily commercial area. A wider range of such facilities do exist on the peripheries of the SRF area and adjacent neighbourhoods.
- Residents in the area are most commonly working in the wholesale trade, likely in the local area, health and social work or professional and technical employment. North Manchester General Hospital is located nearby outside the SRF boundary, which suggests the area likely provides more affordable housing options for those working in the sector.
- The SRF area is also incredibly diverse with less than 75% of the population speaking English as their first language. Whilst historically known as a largely Jewish area, migration of the past century has resulted in large populations of Afghans, Syrians, Iranians and Kurds, families from Pakistan and Bangladesh, and Ukrainians living in the area. This is also reflected in the change of religious identity in the area with increases in the Muslim and Sikh population. The White Gypsy or Irish Traveller population – as reported by the ONS but understood to refer to the local Showmen's Guild population** – also make up a group of the population within the SRF boundary.
- Despite this high level of education and occupation level, the data suggests this population is relatively deprived (within the 20% most deprived areas of the country). The majority of the population also live in private rental properties with others living in affordable and social rented properties. This is noted within the residential trends where there are very low sale transactions (often less than 1 per month) and below average property rates.
- We can derive that this population is likely driven by single-person household economic migration and is relatively transient although there are some communities e.g. within Cambridge and to the northern boundary of Cheetham Hill where the population is more settled.
- Crime in the area is prevalent with the most common offences over the 2021 – 2023 period were vehicle offences, public order offence and violence without injury. However, over the same time period, Greater Manchester Police noted a falling share of victim-based-crime in the area and a corresponding increase in 'other' crime due to increased enforcement in the area including Operation Vulcan.

Discussion:

- In the past, the generations of business evolution generally reflected local communities and have therefore had an intrinsic link to the city economy.
- In more recent years, however, with the changing nature of Manchester's economy, the bonds between the SRF area and the wider city economy have generally weakened.
- Population growth on the fringes of the SRF area demonstrate the potential for growth in the area.
- Beyond the SRF area's existing residential population, our business engagement found that there is a significant non-resident population who make use of the area's amenities and facilities, especially creative makers and customers.

* For the purpose of the residential analysis we have excluded the residents and dwellings of the Output Area which contains HMP Manchester. **The Showmen's Guild is recognised by the authors of this report as a distinct community from those classed as 'White Gypsy or Irish Traveller by the ONS.

Economy + Business Community



Economy + Business Community

This section presents our analysis of the area's economy and seeks to answer four key questions:

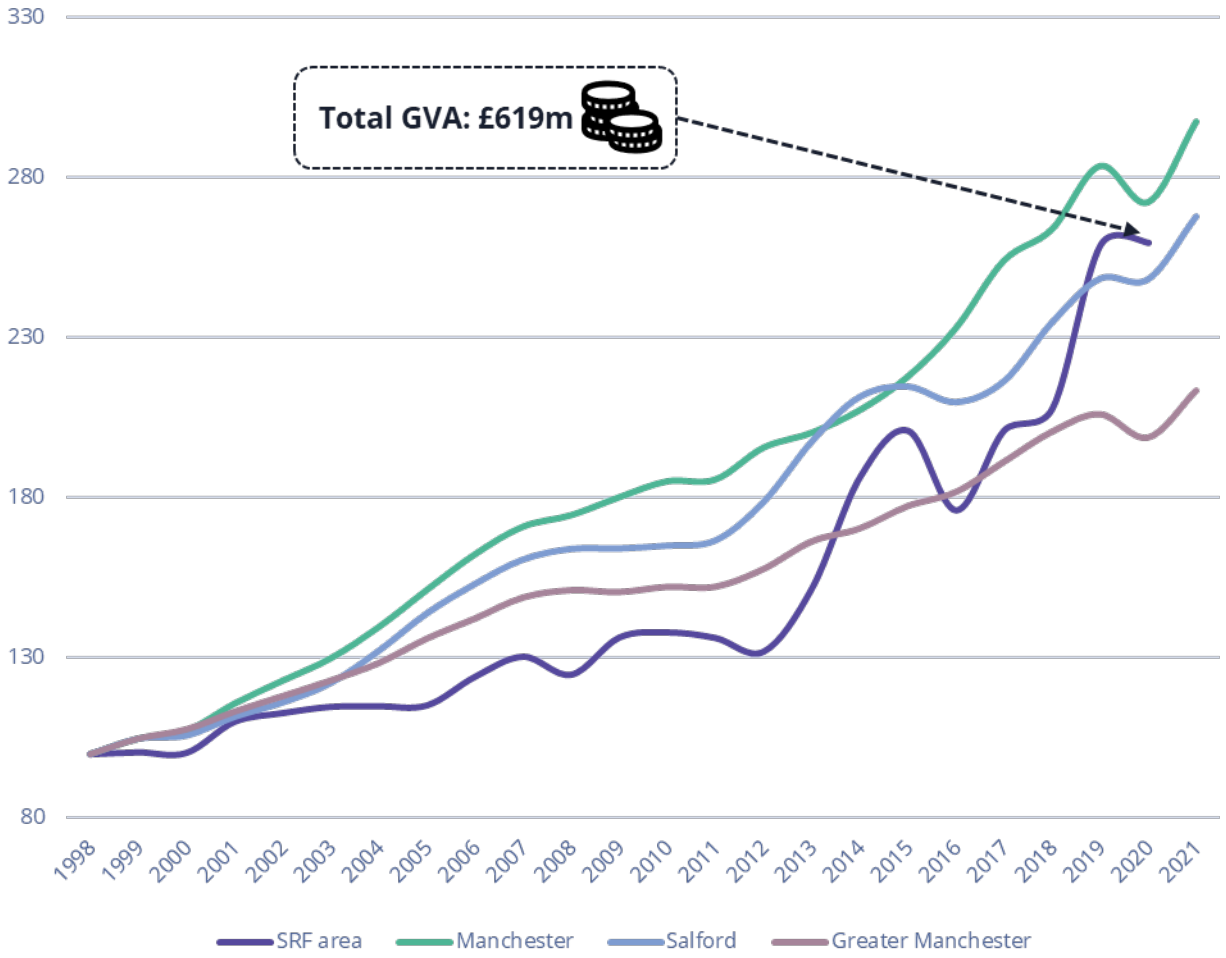
- ***What is the economic contribution of the local business base, and what role does it have in relation to the city centre?***
- ***How does the local economy relate to the regional Greater Manchester economy?***
- ***Do businesses make efficient use of space and labour?***
- ***How is the local economy dispersed geographically?***

In addition to quantitative measures of the area's economy, this analysis includes a qualitative assessment of key trends in the economy and business community. This information has been sourced through interviews with several local businesses.

Gross Value Added (GVA) and Employment

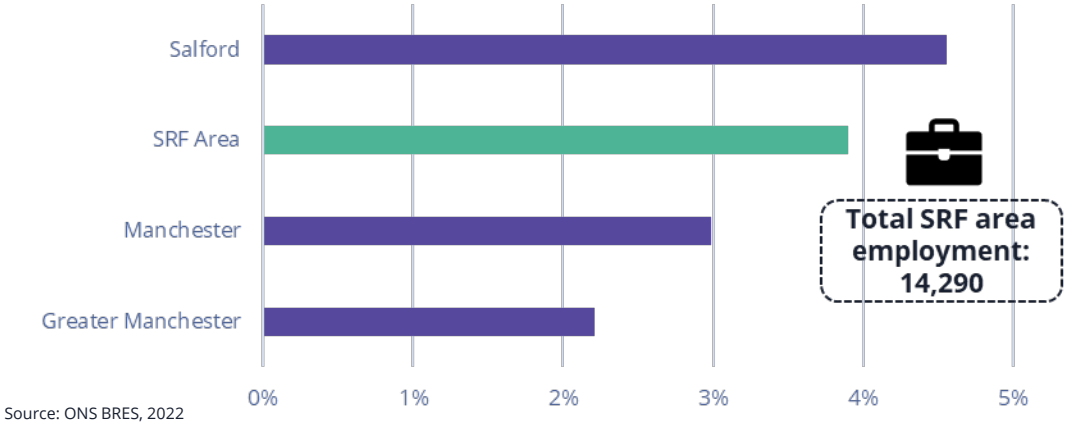
£ GVA, Indexed 1998 = 100

Salford not available



Source: ONS 2020 and 2023. Timeseries data for Salford not available.

Average Annual Employment Growth Rate, 2015-2022



Source: ONS BRES, 2022

GVA and employment:

- The SRF area has seen higher GVA growth since 1998 than the Greater Manchester average, although still below Manchester.
- GVA growth within the SRF has been particularly strong since 2012. This has been driven by the growth of the adjacent city centre and Manchester and Salford local authorities generally. It is worth bearing in mind the limitations of the ONS' small geography GVA estimates, which rely on other ONS datasets to assign regional GVA to small geographies.
- The SRF area has seen a correspondingly high growth in employment from 2015-2022 at **3.9%** (latest available data), higher than the Manchester and Greater Manchester averages, although not as high as Salford's.
- Significant employment sectors within the SRF area include wholesale and retail trade/motor trades; real estate; accommodation and food service; professional, scientific and technical activities; and manufacturing.

GVA and Employment: Productivity & Density

Floorspace Productivity: £m GVA per 1,000 sq ft Commercial Floorspace

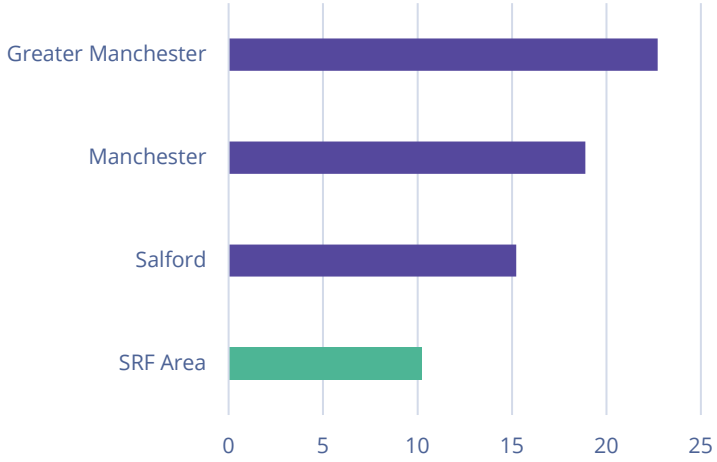
Adjusted to equalise for differentials in space productivity across property types



Source: ONS BRES 2020, CoStar accessed 2023.

Employment Density: Employees per 1,000 sq ft Commercial Floorspace

Adjusted to equalise for differentials in space productivity across property types



Employment Productivity: £ GVA per Employee

Adjusted to equalise for differentials in productivity across sectors



Employment Productivity:

- The SRF area's employment **is 20% less productive** than the Greater Manchester average in GVA output when adjusted for differentials in productivity across industries.
- This overall score is contextualised against the surrounding economy on the '£ GVA per employee' plan adjacent.

Floorspace productivity:

- The SRF area is **70% less productive** in GVA produced from floorspace than the Greater Manchester average when adjusted for differentials in productivity across property types.

Employment density:

- The SRF area's **employment density is 59% lower** than the Greater Manchester average when adjusted for differentials productivity across property types.

Methodology note

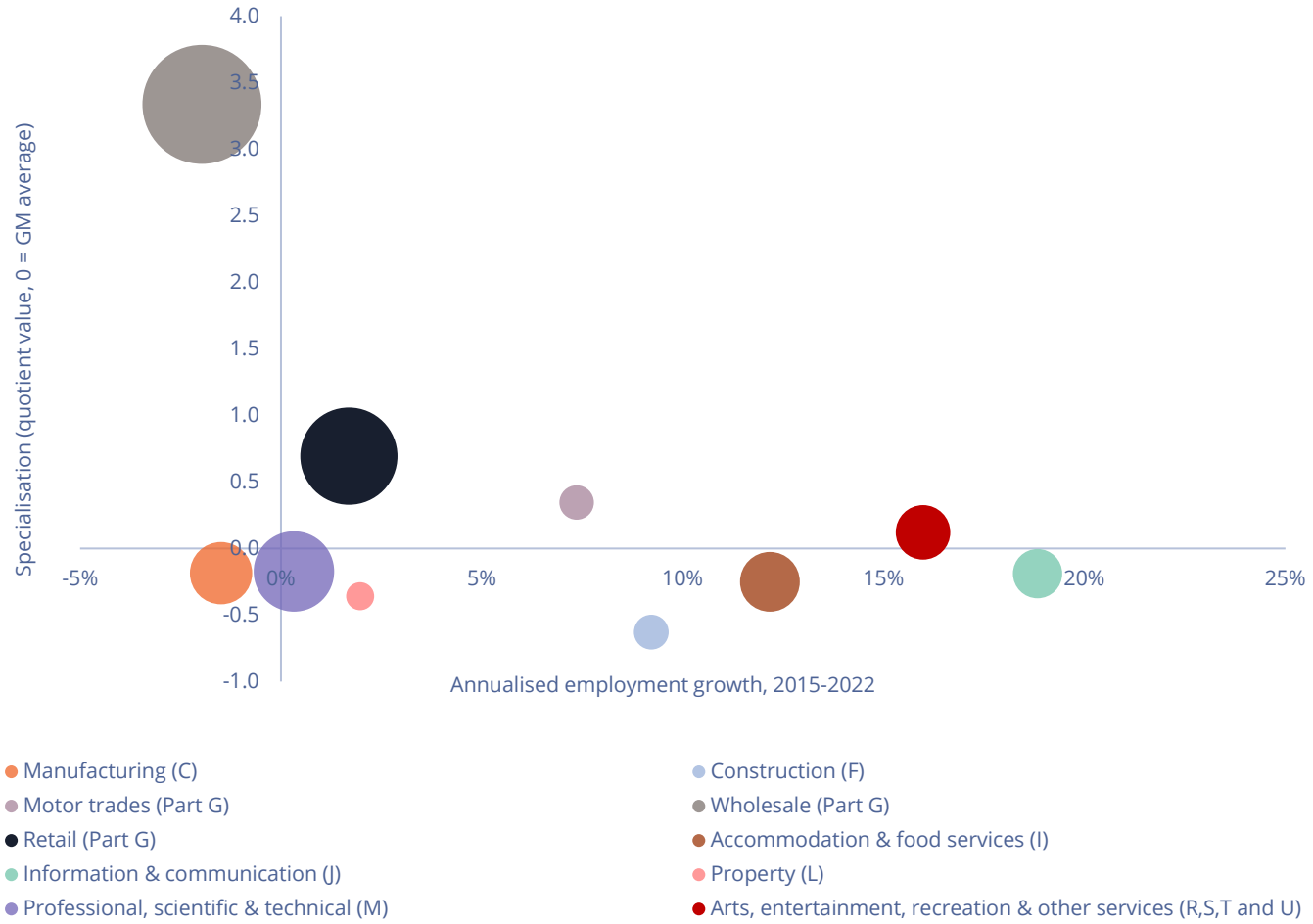
All metrics are equalised by property type or industry so fair comparisons can be made across geographies regardless of their property type or industry mix.

As above, it is worth bearing in mind the limitations of the ONS' small geography GVA estimates, which rely on other ONS datasets to assign regional GVA to small geographies.

Business Specialisation and Growth

Selected Sectors by Average Growth 2015-2022, Specialisation, and Size

Specialisation measures the difference between a sector's proportion of local workplace-based employment v. proportion of GM workplace-based employment; bubble size = total 2022 employment.



Source: ONS BRES 2023.

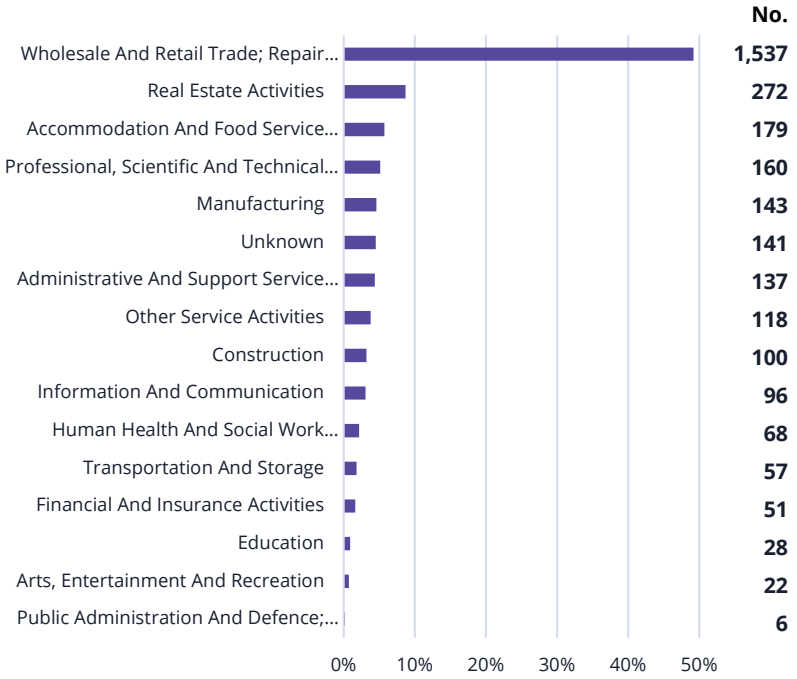
A changing economy:

- Wholesale, whilst being a highly specialised sector compared to the Greater Manchester average, and remaining the largest employer in the SRF area, it has seen annualised declines in employment of **-2%** since 2015. This reflects sentiment reported by local stakeholders, particularly whereby some family-run wholesale businesses are being lost from the area as younger generations are now less likely to take on their operations. Manufacturing is another sector that has seen declines in employment over the period, at **-1.5%** per annum. It is understood that this continues a long-term trend of decline in manufacturing.
- The area's growth industries are the information and communication and arts, entertainment and recreation sectors, achieving **19%** and **16%** annualised gains in employment over the period. The latter is marginally specialised compared to the Greater Manchester average.
- Notably, the area does not yet have a significant sector which is high growth **and** highly specialised. Retail and motor trades are the sectors which most closely fit this description, the former coming to directly replace some wholesale activity as businesses transition.

SRF Business Community

Share of Businesses Within the SRF area, by Sector

Total businesses: 3,126



Focus on the Vape Sector

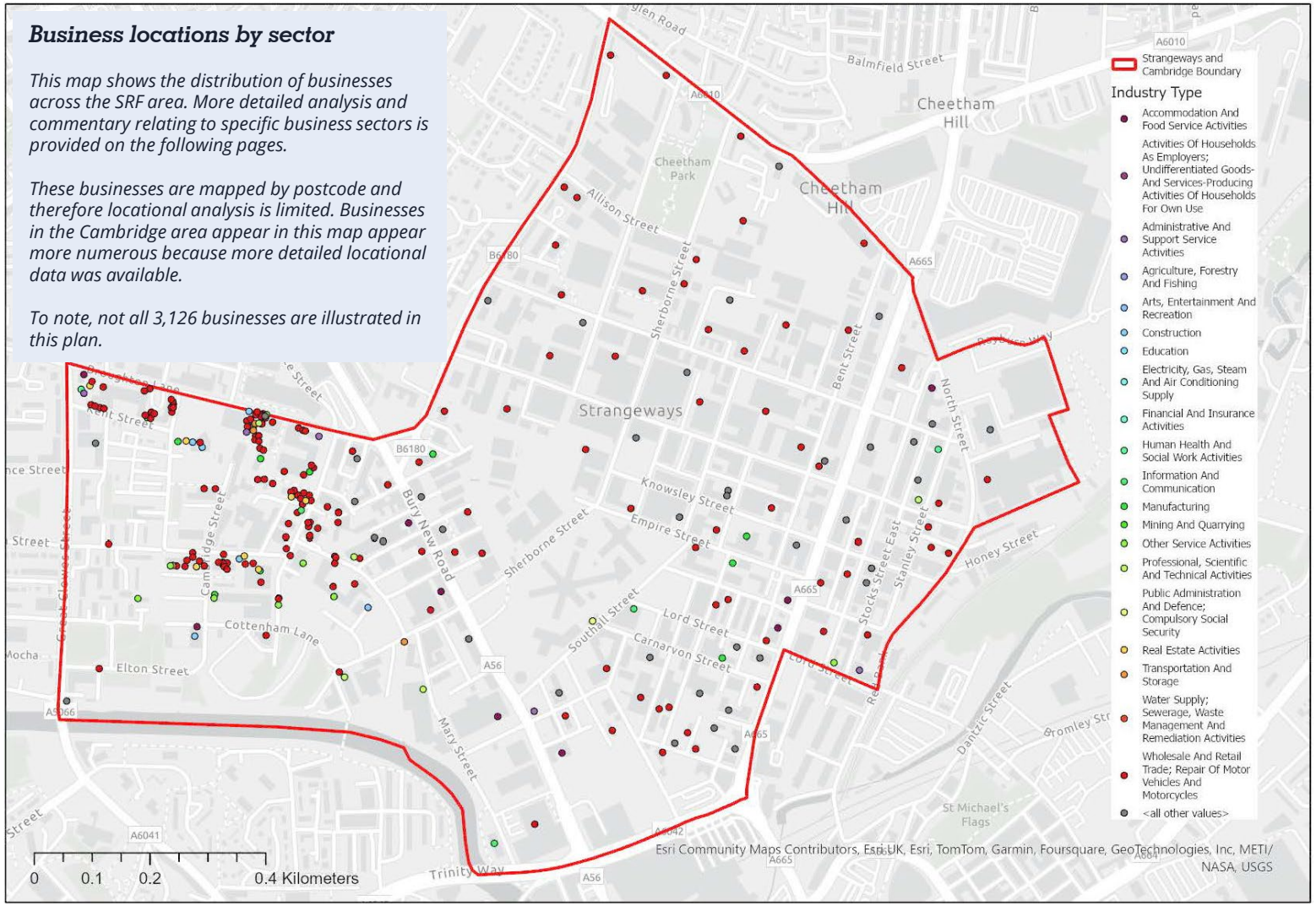
SIC codes of companies with 'vape' in their name	Count
Non-specialised wholesale trade	14
Retail sale of tobacco products in specialised stores	8
Wholesale of tobacco products	4

Business locations by sector

This map shows the distribution of businesses across the SRF area. More detailed analysis and commentary relating to specific business sectors is provided on the following pages.

These businesses are mapped by postcode and therefore locational analysis is limited. Businesses in the Cambridge area appear in this map appear more numerous because more detailed locational data was available.

To note, not all 3,126 businesses are illustrated in this plan.

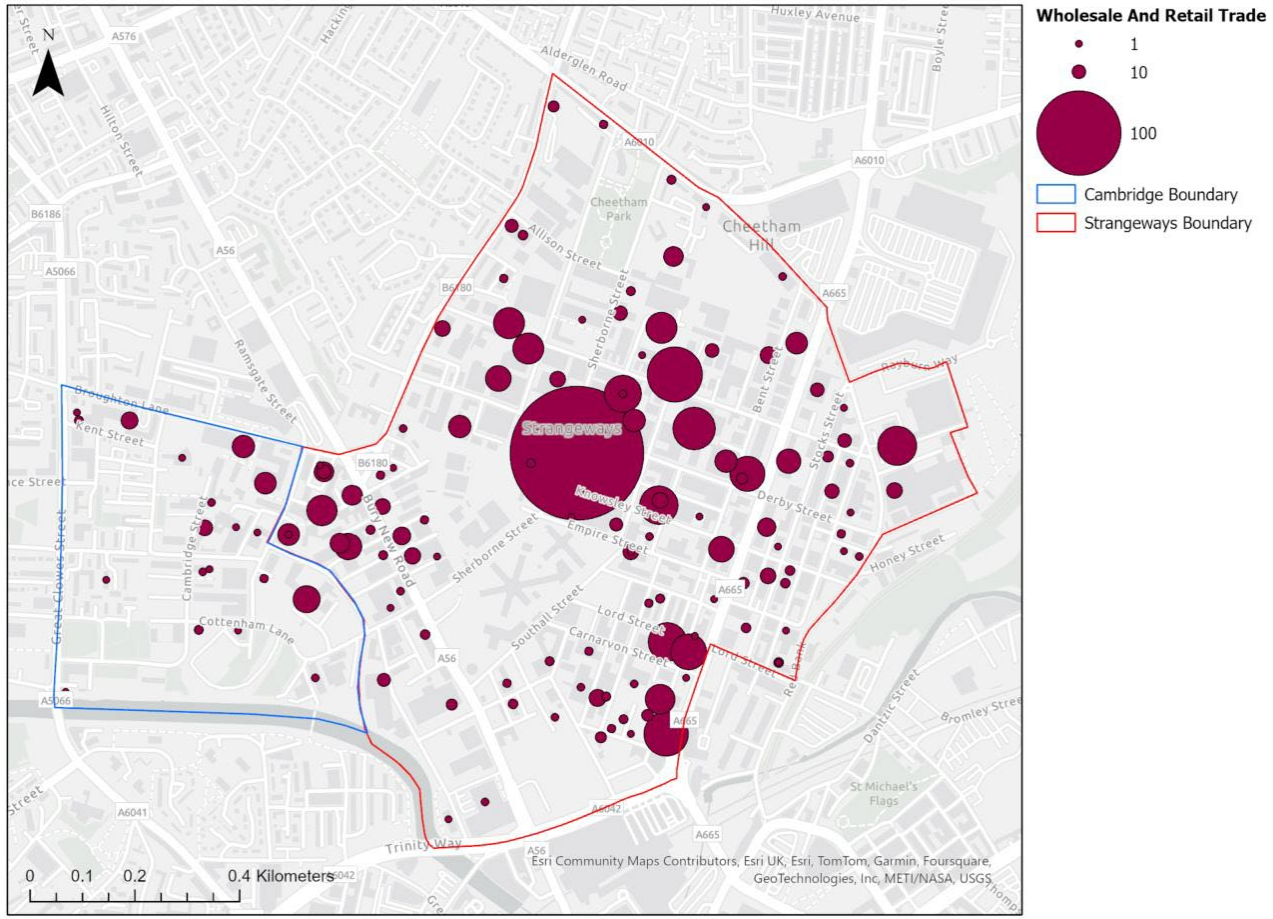


Source: IDBR, FAME and Experian via Manchester City Council and Salford City Council, accessed 2023. Map produced by Avison Young.

SRF Business Community: Wholesale

Distribution of Wholesale and Retail Businesses Across the SRF area

No. of businesses by postcode



Source: IDBR, FAME and Experian via Manchester City Council and Salford City Council, accessed 2023. Map produced by Avison Young.

Distribution and clustering:

- Wholesale and retail businesses are the most common across the SRF area accounting for **nearly half** of all businesses.
- They are spread across the entire area with most prevalence in the areas to the north of HMP Manchester between Broughton St and Deby St. There are also cluster within Cambridge Business Park and south of Lord St.
- A significant portion (**19%**) of wholesale businesses are focused on online exchange with customers.
- Clothing, footwear and textiles wholesalers comprise **68%** of the total wholesale sector in the SRF area.

Top Sub Sectors Within Wholesale and Retail, by Share and No. of Businesses

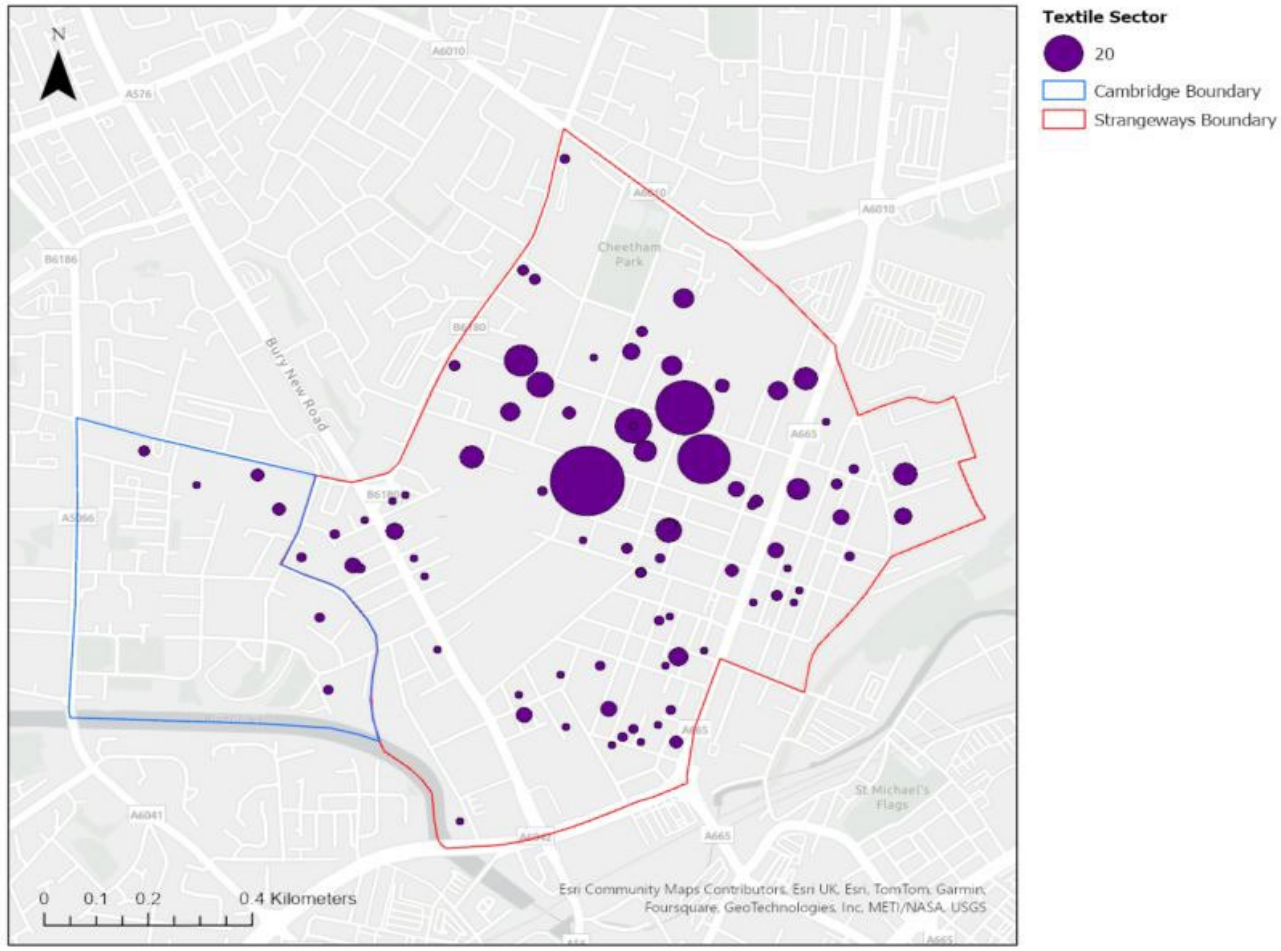


Source: Experian, IDBR and FAME via Manchester City Council and Salford City Council. Avison Young analysis.

SRF Business Community: Focus on Textiles

Distribution of Textiles Businesses Across the SRF Area

No. of businesses by postcode

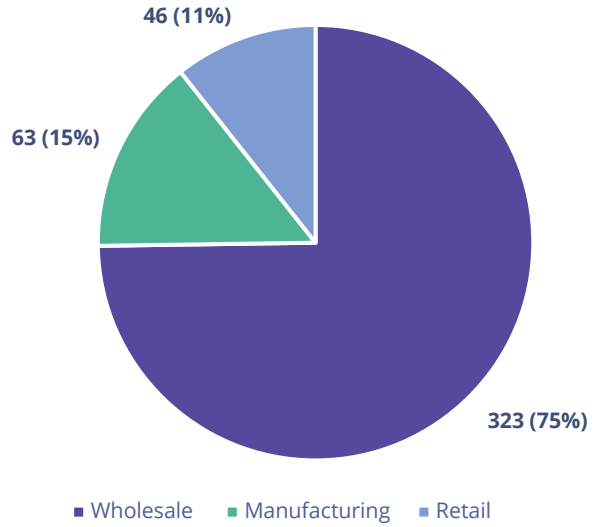


Source: IDBR, FAME and Experian via Manchester City Council and Salford City Council, accessed 2023. Map produced by Avison Young.

Textile industry distribution and clustering:

- The local textile industry, across all sectors such as wholesale and manufacturing, is worth approximately **£150-175m GVA,** around 24-29% of the SRF area's total GVA. It employs approximately 2,250 – 2,750 people.
- Wholesale accounts for **three-quarters** of all businesses involved in the local textile industry. Retailers comprise a further **11%** and manufacturing **15%**.
- Accordingly, due to its dominance within the wholesale sector, textile wholesalers are primarily located in the core Derby St/Broughton St area.
- The textile industry was worth approximately **£100-200m GVA,** around 16-32% of the SRF area's total GVA.

No. of Textile Wholesale and Retail v. Manufacturing Businesses

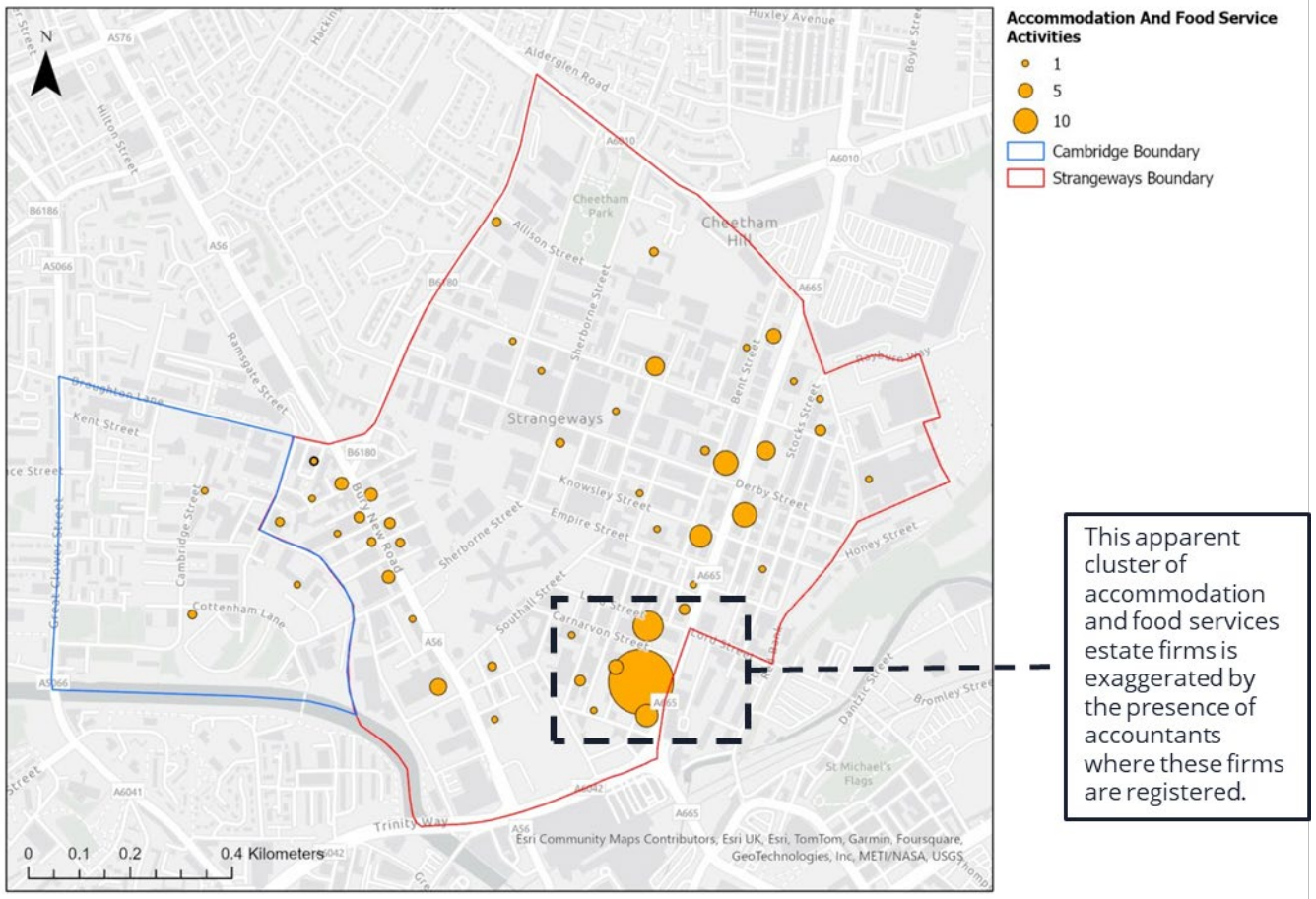


Source: Experian, IDBR and FAME via Manchester City Council and Salford City Council. Avison Young analysis.

SRF Business Community: Accommodation and Food Services

Distribution of Accommodation and Food Service Activities Businesses Across the SRF area

No. of businesses by postcode



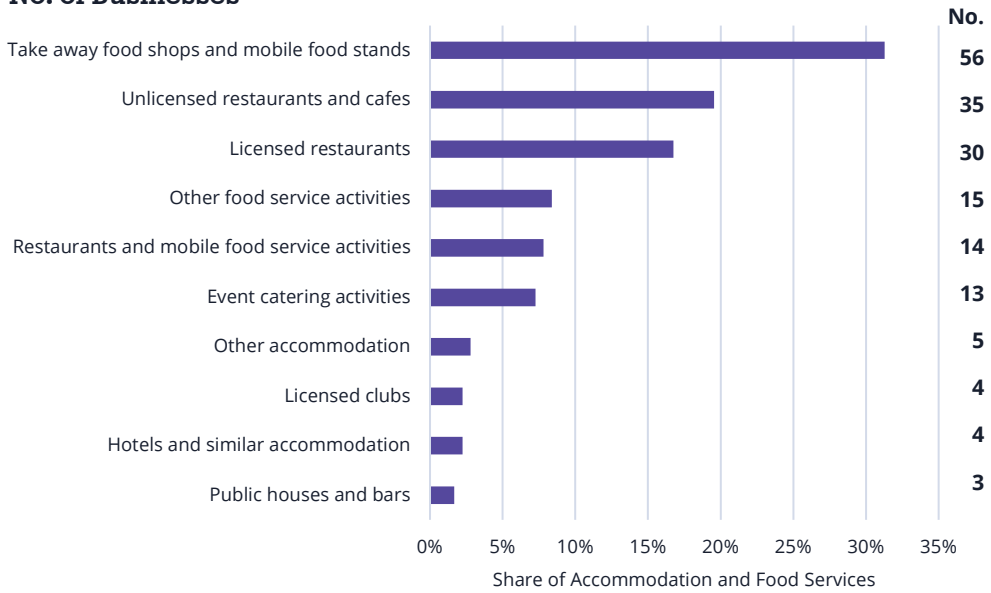
This apparent cluster of accommodation and food services estate firms is exaggerated by the presence of accountants where these firms are registered.

Source: IDBR, FAME and Experian via Manchester City Council and Salford City Council, accessed 2023. Map produced by Avison Young.

Distribution and clustering:

- Accommodation and Food Services are more likely to be located on the arterial routes with a cluster at the south of SRF boundary nearest to the city centre.
- There are several cafes and restaurants along Cheetham Hill Road especially which make significant trade from both daytime and nighttime custom.
- Some food businesses in this area operate either as 'dark kitchens' or otherwise make significant custom through online orders.

Top Sub Sectors within Accommodation and Food Services, by Share and No. of Businesses

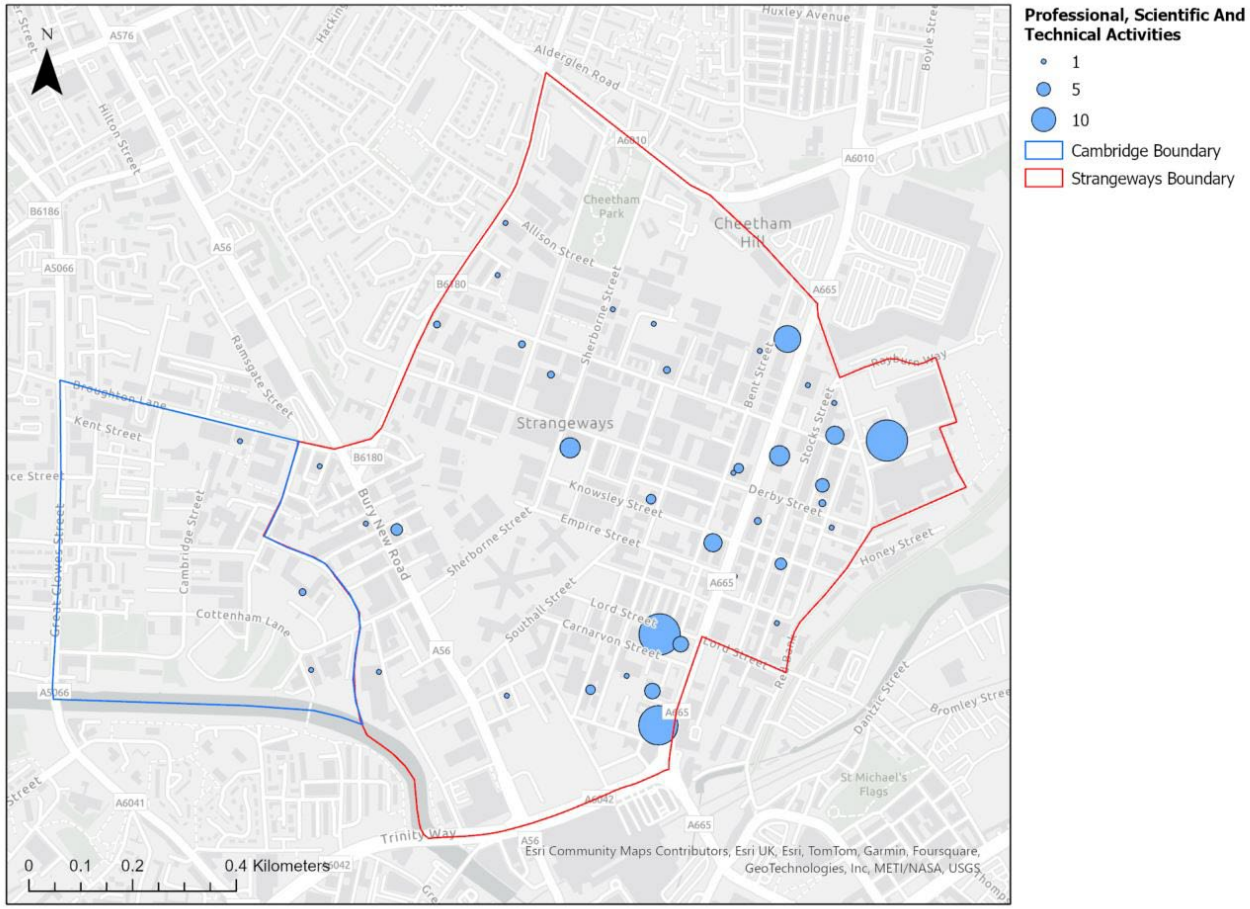


Source: ONS BRES 2022

SRF Business Community: Professional, Scientific & Technical Services

Distribution of Professional, Scientific & Technical Services Businesses Across the SRF Area

No. of businesses by postcode

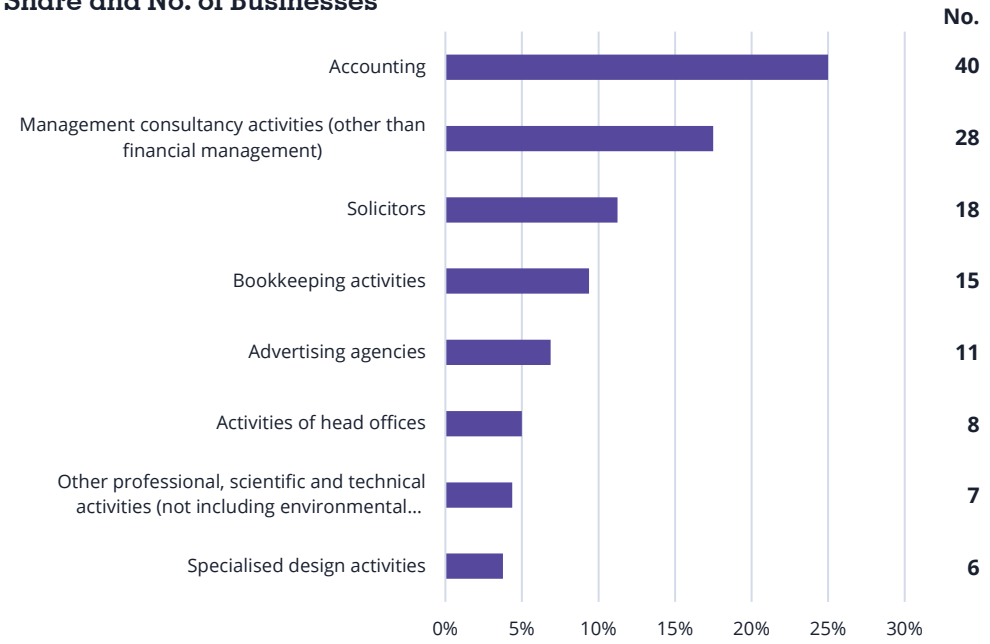


Source: IDBR, FAME and Experian via Manchester City Council and Salford City Council, accessed 2023. Map produced by Avison Young.

Distribution and clustering:

- Professional, Scientific and Technical Services businesses tend to be located along the Cheetham Hill corridor, both close to Manchester city centre and further north.
- This suggests that, in general, many of these businesses may be serving the local community more so than the area's real estate businesses.
- Accountants, management consultants and solicitors are the most prevalent professional services firms in the area.

Top Sub Sectors within Professional, Scientific & Technical Services, by Share and No. of Businesses

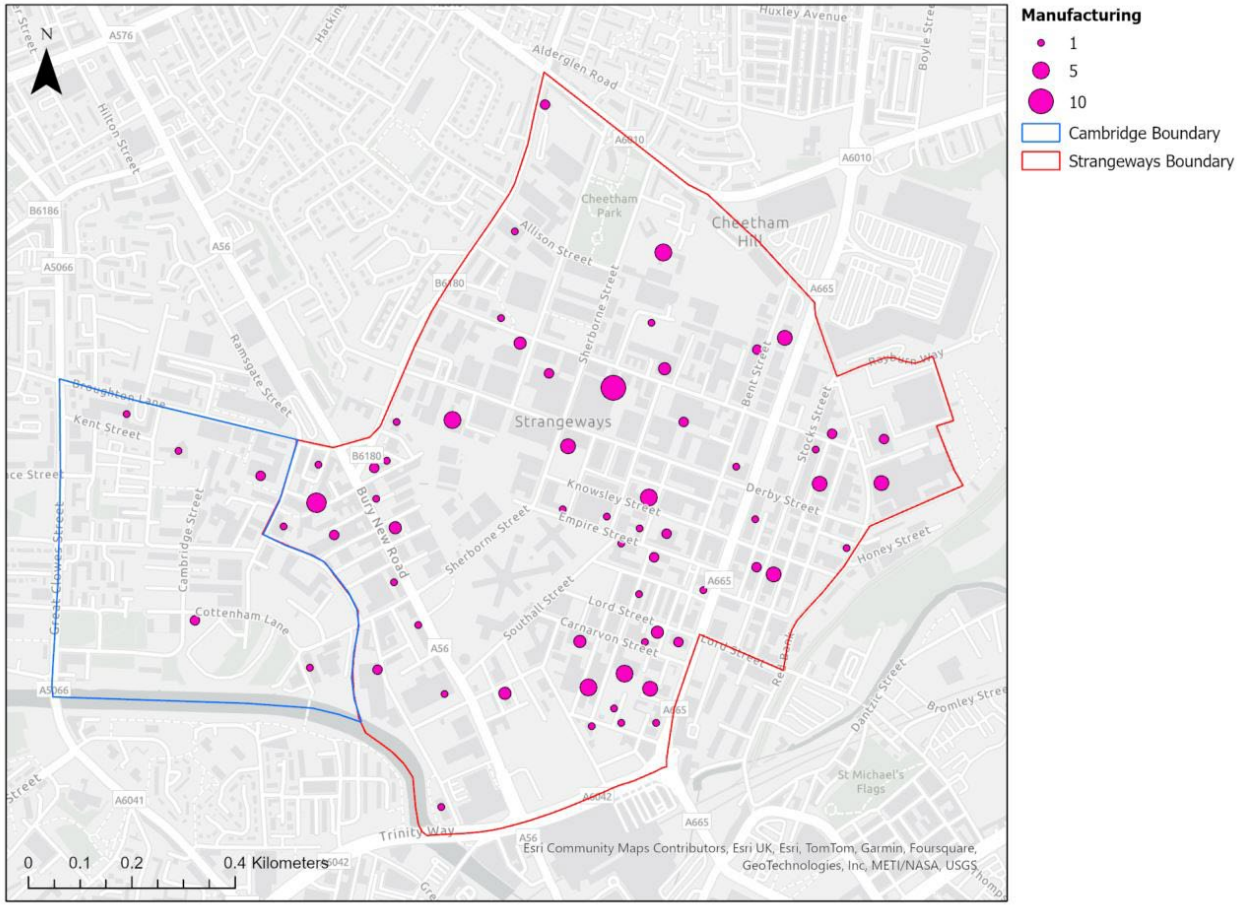


Source: ONS BRES 2022

SRF Business Community: Manufacturing

Distribution of Manufacturing Businesses Across the SRF Area

No. of businesses by postcode



Source: IDBR, FAME and Experian via Manchester City Council and Salford City Council, accessed 2023. Map produced by Avison Young.

Distribution and clustering:

- Manufacturing businesses are spread broadly across Bury New Road, south of Lord St, and Derby St areas.
- They are generally located off main streets to take advantage of lower rents per sq ft and since they do not rely on transport infrastructure to the same extent as wholesale businesses.
- Textile manufactures are the dominant subsector within manufacturing, comprising **79%** of the sector total.
- Although textiles manufacturing appears as a significant industry below, we also understand from business consultation this is limited to specific items such as knitwear which due to their bulky nature benefit from being located near wholesalers.

Top Sub Sectors within Manufacturing, by Share and No. of Businesses

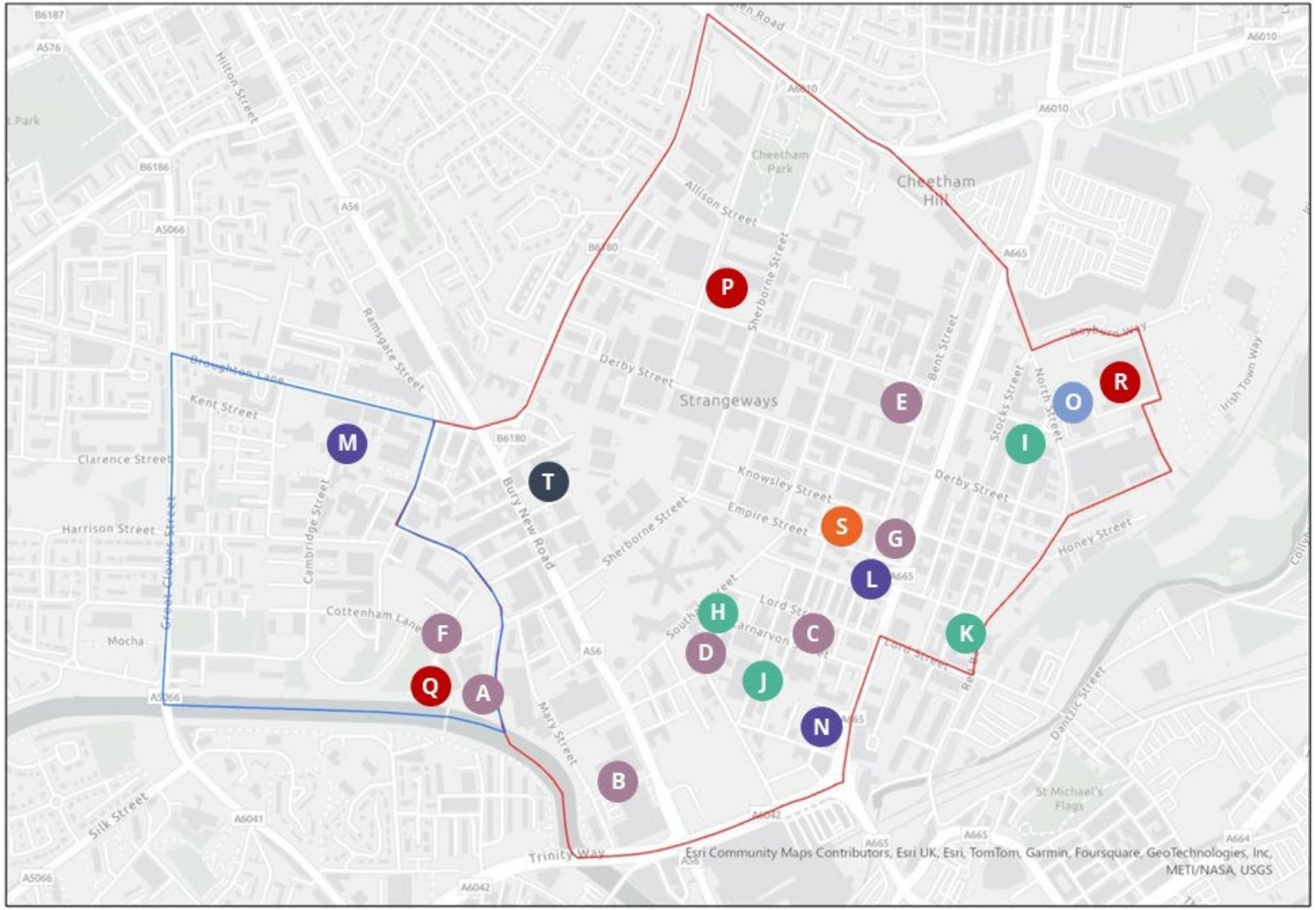


Source: ONS BRES 2022

Selected Creative, Cultural, Leisure and other Notable Occupiers

These notable businesses help to illustrate the types of activities taking place in the SRF area, some of which we have consulted directly in 1-1 sessions. They have been selected for varying reasons, including their **size**, **distinctness** and **creative appeal**. As such, this list captures both long-standing occupiers and newer enterprises. Moreover, some businesses operating within the Great Ducie Street SRF, identified in the following pages, are doing so through temporary consents and therefore expect to move as development progresses in the area.

Map Ref	Business Name	Industry
A	Hidden	Arts, Entertainment And Recreation
B	Kickair	Arts, Entertainment And Recreation
C	Predators MMZ and BJJ Academy Manchester	Arts, Entertainment And Recreation
D	Rock Over Climbing	Arts, Entertainment And Recreation
E	The Yard	Arts, Entertainment And Recreation
F	White Hotel	Arts, Entertainment And Recreation
G	Derby Brewery Arms	Arts, Entertainment And Recreation
H	First Asian Support Trust	Charity/non-profit
I	Manchester People First	Charity/non-profit
J	The Booth Centre	Charity/non-profit
K	The Shaw Centre	Charity/non-profit
L	PIRATE.com	Information And Communication
M	Studio 88 MCR	Information And Communication
N	1520 Studios	Arts, Entertainment And Recreation
O	GQ Studios	Professional, Scientific And Technical Activities
P	Benmar Textiles Ltd	Wholesale and Retail Trade
Q	Private White	Wholesale and Retail Trade
R	Rayburn Trading	Wholesale and Retail Trade
S	Joseph Holt	Manufacturing
T	Al Maidah Banquet Hall	Accommodation and Food Services



Selected Creative, Cultural, Leisure and other Notable Occupiers

Business Name	Industry	Description	Sq Ft Occupied	Address
Hidden	Arts, Entertainment And Recreation	Nightclub with a dance floor, live DJs, cocktails & drinks.		16-18 Mary St, Cheetham Hill, Manchester M3 1NH
Kickair	Arts, Entertainment And Recreation	Activity centre with giant trampolines, indoor soccer & rock climbing, plus a kids' play area. ***Occupying on basis of temporary planning consent.***		61 Great Ducie St, Cheetham Hill, Manchester M3 1RR
Predators MMZ and BJJ Academy Manchester	Arts, Entertainment And Recreation	Fitness centre offering classes in mixed martial arts, kickboxing & Brazilian jiu-jitsu		First Floor, 15 Chatley St, Cheetham Hill, Manchester M3 1HU
Rock Over Climbing	Arts, Entertainment And Recreation	Climbing gym featuring bouldering terrain for various skill levels, plus a kids' play area & a cafe. ***Occupying on basis of temporary planning consent.***	12,400	Park Garage, Cheviot St, Cheetham Hill, Manchester M3 1LW
The Yard	Arts, Entertainment And Recreation	Music venue, creative workspace and studios		11 Bent St, Cheetham Hill, Manchester M8 8NF
White Hotel	Arts, Entertainment And Recreation	A former garage that hosts regular gigs from up-and-coming artists.		Dickinson St, Salford M3 7LW
Derby Brewery Arms	Arts, Entertainment And Recreation	Public house and late-night music venue.		95 Cheetham Hill Rd, Manchester M8 8PY
First Asian Support Trust	Charity/non-profit	Delivers provision and services which help the most vulnerable access the skills and knowledge to address the inequalities they face		47-49 Carnarvon St, Cheetham Hill, Manchester M3 1EZ
Manchester People First	Charity/non-profit	A self advocacy group for adults with learning disability	2,251	3 Broughton St, Cheetham Hill, Manchester M8 8RF
The Booth Centre	Charity/non-profit	Wide ranging service provision for homeless people, including shelter, health and well-being and employment services		Edward Holt House, Pimblett Street, Mancehster, M3 1FU
The Shaw Centre	Charity/non-profit	Provides user led services for adults with learning disabilities		Redbank House, 43 Red Bank, Cheetham Hill, Manchester M4 4HF





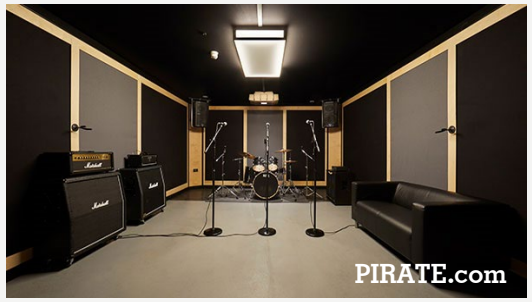




Selected Creative, Cultural, Leisure and other Notable Occupiers

Business Name	Industry	Description	Sq Ft Occupied	Address
PIRATE.com	Information And Communication	Recording studio space providing 24-hour access.	5,200	1 Augustus St, Cheetham Hill, Manchester M3 1HZ
Studio 88 MCR	Information And Communication	A recording studio supporting the development of artists through tuition and production		63a Cambridge St, Salford M7 1UY
1520 Studios	Information And Communication	Creative workspace and studios		19 Cheetham Hill Rd, Cheetham Hill, Manchester M4 4FY
GQ Studios	Professional, Scientific And Technical Activities	High end ecommerce photograph studio		The Tube, 86 North Street, Manchester, M8 8RA
Benmar Textiles	Wholesale and Retail Trade	Fabric specialists located in Manchester since 1958, providing high quality fabric.	9,900	Cheetwood Rd, Cheetham Hill, Manchester M8 8AQ
Private White	Wholesale and Retail Trade	A luxury clothing factory	5,810	Cottenham House, 1 Cottenham Ln, Salford M3 7LJ
Rayburn Trading	Wholesale and Retail Trade	"The UK's number 1 independent wholesaler". Household, toiletries, drinks and confectionaery wholesaler.	89,523	90 North St, Cheetham Hill, Manchester M8 8RA
Joseph Holt	Manufacturing	Brewery		Empire St, Cheetham Hill, M3 1JD
Al Maidah Banquet Hall	Accommodation and Food Services	Banquet hall including a buffet restaurant and wedding hall.		Sagar St, Manchester M8 8EU







Business Community: Key Themes

This page sets out some of the key themes identified in our desk-based research and business consultation.

The businesses identified in the preceding pages reflect both the 'new' and 'traditional' economies of the SRF area. Crucially, these businesses seem to operate with limited conflict between each other. Engagement with, and survey results from, the owners/operators of these businesses suggest many are deeply invested in the area.

Transition from wholesale

The SRF area is undergoing an economic transition. Its largest and most specialised industry of wholesaling has been gradually declining in recent years. The rise of internet retailing has been a major competing factor for the wholesalers' business, which has required significant adaptation. This was noted in both conversations with businesses and quantitative analysis.

Some wholesale businesspeople have embraced internet sales into their existing models – commonly focusing on import/export trading models or ecommerce including the use of social-media focused strategies. Inevitably, some traders have been left behind, too slow to adapt to the changing economy. Engagement with local businesses found that some of these traders are now concentrated in the vape sector.

Some landlords have started subdividing large single-unit buildings into smaller showroom-focused retail units with lower stock levels. This was noted in 1-1 business engagement as well as noticeable in some of the construction work taking place within the SRF boundary. Most in-person trade is now based on one-off transactions with fewer repeat visits; the traditional cash-and-carry model has mostly faded. This subdividing is also true across other sectors in the area, which is evident especially in Salford where 91% of businesses receive some form of (mostly small business) business rates relief. Other landlords have gone further in converting their premises into a variety of uses including banqueting halls and offices.

Interdependence

The traditional local wholesaling economy was based on a structured network of national/international suppliers. A typical network might have comprised raw materials imports in London, manufacturing in Leicester, and distribution from the SRF area.

The businesses located in the area today – not only wholesalers – remain embedded in multifaceted local, regional, national and international relations. There remain food and drink outlets who source wholesale products from Broughton Road; delivery-focused business who work within a c.2hour radius of the north west; and wholesale traders who import from China for UK-based ecommerce. Moreover, whilst many businesses recruit from all over Manchester, some employers, especially food and drink outlets, employ directly from the surrounding neighbourhoods such as Cheetham Hill.

City centre links

There are some businesses in the area, including restaurants and Travelodge, which have a specific relationship with the AO Arena. However, we did not find many businesses whose proximity to the city centre was critical to their operations.

In general, the economy of the business community in the SRF boundary is more influenced by the proximity and connections between the businesses than the link to Manchester city centre. For example, it was noted within the business engagement that many customers will visit several wholesalers within the SRF boundary within one business trip. Only businesses such as Travelodge, which has a direct reliance on events at the AO arena, and some of the banqueting halls noted the direct link to the city centre as very important.

However, the proximity to the city centre does provide other important reasons for the businesses to function. This includes the road network and transportation connections for customers both nationally and internationally, the proximity to a local workforce and the ability to get to the business premises via road or public transport.

Export

There are businesses within the SRF area which have a unique appeal and are as such exporting beyond Greater Manchester and internationally. The area's banquet halls attract customers from across the UK; Joseph Holt Brewery brew products for their network of public houses across the north west; The White Hotel is regarded as a leading techno music venue across Europe; Private White's growth market for their high-quality garments is East Asia.

Beyond the Northern Quarter

Manchester's creative and cultural economy has for several years been evolving beyond its hub in the Northern Quarter into areas beyond the city centre. Along with Holt Town to the east, the SRF area has become a target area for those seeking affordable creative workspaces and studios. The availability of this space is expanding in the SRF area – for example, at the 1520 Studios and The Yard. The area is accessible from the city centre, and offers an alternative, edgy environment which is conducive to many in the creative industry.

Business Community: Key Themes

Cultural importance

The SRF area is host to many culturally significant businesses and organisations which help to draw footfall to the area and contribute to the city's cultural appeal more generally.

Most businesses recognised the cultural significance of the Strangeways and Cambridge SRF area economy. Many businesspeople either grew up or had parents who worked or owned businesses in the area. Most recollected events such as the 1990 Strangeways Riot and the 2015 floods as notable collective memories.

Networking

Successful businesses have grown from the informal networks in the area. There is, however, no formal business forum. An organisation of sorts was founded within recent years but it is no longer in operation. A variety of reasons for this were provided including the sheer number of businesses in the area, different priorities and interests among different sectors, the pressure of time and linguistic and/or cultural barriers. There was, however, some appetite within the business community in trying to restart a forum.

Use of space

Where buildings are in useable condition, vacancy across the SRF area is low, turnover of occupiers low, and new enquiries high. Most occupiers are working from purpose-built facilities, but some are making do with inadequate buildings. For instance, Private White currently operates its end-to-end garment manufacturing from a narrow, four-storey building which requires them to winch products between floors. Some wholesalers would benefit from improved servicing and access.

Quality of environment

Many businesses reported through surveys and in-person engagement the significant impacts of fly tipping, poor highway maintenance, anti-social behaviour and frequent 'low level' criminal activity.

Businesses who are part of the area's 'new' economy in particular highlighted these as issues given their reliance on drawing visitors and businesses to the area. Some businesses in our survey also cited weak internet connectivity in the area.

Most businesses reported that Operation Vulcan had had a positive impact in terms of improving actual and perceptions of criminality in the area, with businesses reporting they were previously tainted by the levels of illegality and suffered a fall in custom as a result.

However now those business premises have been vacated (and left vacant) the 'blight' around the Moulton St/Bury New Road area is reportedly having an impact both on footfall and perceptions of the area. Addressing these vacancies, raising the quality of the area, is seen as vital to future success.

In some areas, businesses highlighted challenges with vehicle conflicts, most notably linked to the ability to service businesses given the level of on street parking. Some businesses also noted Aa lack of pedestrian/cycle infrastructure which was a challenge for those who rely on the local residents for their workforce.

Business Community: Case Studies

The Yard

The Yard is a creative workspace and venue operating in a former school building on Bent Street, Strangeways.

Facilities include recording studios, meeting rooms, indoor and outdoor events spaces, and an atelier.

The Yard is a key part of the local creative community, offering affordable workspace for creators. The Yard reported to us that they are increasingly seeing demand for space from creators priced out of the Northern Quarter.

They are a key institution within the SRF area, acting as a hub for the local creative economy.





Joseph Holt

Joseph Holt is a brewery based on Empire Street, Strangeways, which has been operating since 1860.

The brewery serves the group's c.130 pubs across the North West of England using water from the aquifer beneath the site.

Their long-term vision is to continue brewing but also develop a visitor attraction on site. This could be enabled by closing Empire Street and developing on the group's adjacent land holdings

Private White

Private White is a luxury clothing manufacturer based on Cottenham Lane, Cambridge.

They employ 85 people on site on a permanent basis, specialising in men's coats and jackets.

Private White have ambitions to grow their operations and real estate footprint substantially over the next decade, focusing on the potential for export trade.



Al Maidah Banqueting Hall

Al Maidah Banqueting Hall is a restaurant and wedding venue based on Bury New Road, Strangeways.

The building was originally a fashion wholesale warehouse which the owners converted in 2010 as the trade declined.

The facility attracts customers from across the UK and has capacity for 200 in its restaurant and 350 as a wedding venue. It makes significant trade from linked visits to the nearby AO Arena.

Economy and Business Community Key Findings & Discussion

Key question: What is the economic contribution of the local business base, and what role does it have in relation to the city centre?

- The SRF area has over the past decade seen GVA and employment growth greater than regional averages. GVA totals **£260m** and employment **14,290**. This has been driven by the growth of the city centre and Manchester and Salford local authorities generally.
- The area as a whole has a lower employment density by commercial floorspace than the Greater Manchester average; lower GVA output by floorspace; as well as lower productivity per employee than average.
- The local economy is not *critical* to the success of the city centre. There are certain businesses who count the city centre as an important market, but they are outnumbered by businesses who supply a broader regional and national market.
- The area's largest and most unique industry is wholesale and retail trade, which accounts for half of all businesses. One-fifth of these businesses primarily serve customers online. The sector as a whole is in decline in employment terms.
- Other sectors overrepresented in employment terms compared to the regional average include manufacturing, creative and retail trades.
- Textiles remains the dominant industry in the area, both in wholesale and to a lesser extent manufacturing, and is worth approximately **£150-185m GVA.**

Key question: Do businesses in the SRF area make efficient use of space and labour?

- Despite the area's recent growth in GVA over recent years, it remains less productive in its use of floorspace and employment, and less dense in employment than regional averages and of neighbouring areas of the city.
- During consultation with local businesses, we found that many were making do with sub-optimal facilities. In particular, many plots across the area have inadequate servicing and access arrangements. Notably, Private White are operating from an old building across multiple storeys which is unsuitable for their long-term ambitions.

Key question: How is the local economy dispersed geographically?

- Wholesale is clustered around the centre of the SRF area, between Derby St and Broughton St. As the main industry functioning within this sector, textiles businesses are distributed similarly.
- Real estate, and professional services are clustered towards the city centre and up Cheetham Hill Road.
- Accommodation and Food is clustered along Bury New Road and Cheetham Hill Road.
- There are several notable businesses we have identified for either their size, distinctness or creative appeal. These businesses mostly cluster along Cheetham Hill Road and the riverside.

Discussion:

- The SRF area's traditional economy remains relatively strong, despite seeing slight declines in employment in recent years and challenges such as EU exit and changing consumer habits.
- Wholesaling remains a significant industry in the area but in recent years has broadened into non-textile products and into retailing. Very few businesses remain in the manufacturing side of the textile trade.
- Another key change in the area's economy is the emergence of new uses such as creative production, entertainment, food outlets, and leisure.
- These emerging 'new uses' include businesses which encourage footfall and contribute to the city's cultural appeal, and appear to coexist successfully alongside longstanding businesses and occupiers.

Real Estate Market



Real Estate Market

This section supports the preceding Business Community and Economy sections by answering the key questions:

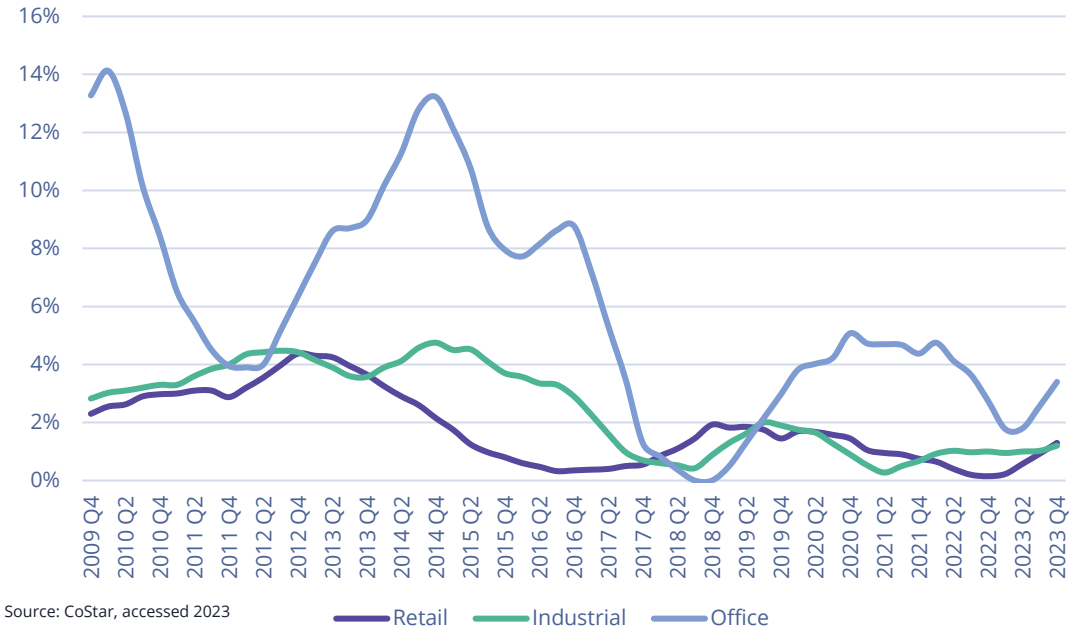
> ***"What are the key real estate trends which underpin economic activity and will inform the SRF going forward?"***

Our analysis includes an assessment of business rate liabilities, vacancy rates, rents, take-up, development and investment. This analysis is differentiated by property type and with particular focus on the industrial and retail sectors dominant in the area.

An understanding of land ownership informs the SRF's delivery strategy: specifically, its phasing, character areas, and key areas of intervention.

Commercial Vacancy & Rents

Commercial Real Estate Vacancy Rates in the SRF area, 12m Rolling



Source: CoStar, accessed 2023

Real Estate market:

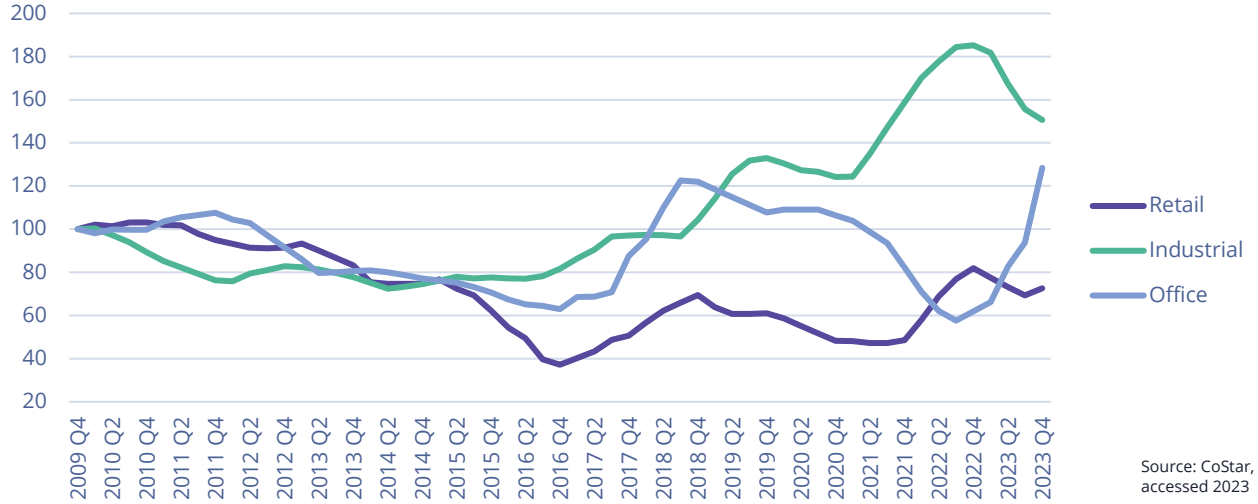
- Retail and industrial vacancy rates have not risen above **2%** in the past two years, and only reached a peak of just **5%** and **4.5%** respectively in the aftermath of the Global Financial Crisis. Small office market results in significant fluctuations in vacancy rate.
- Current rental levels equate to approximately **£16.80 psf** for offices, **£15.80** for retail, and **£6.50** for industrial.

- Rents for retail, industrial and office units diverged in growth trajectories from around 2015, where industrial has outperformed, office has fluctuated mostly due to developments closer to Manchester city centre, and retail has plateaued with low growth.

Note on Cambridge Industrial Estate:

- A significant portion of the SRF area in Salford is covered by the Cambridge Industrial Estate, of which Salford City Council own 60% of the freehold interest area. Across parts of the estate there is evidence of dilapidation and poor quality public realm, and many plots are restricted in their use by flood risk.
- Much of the site is let on long leaseholds, the terms of which are reducing to the point where units are becoming uninvestable for tenants and subsequently increasing the Council's liability.
- Despite this, demand for units on the estate remains high, mainly due to the suppression of prices caused by underinvestment.
- Salford City Council has not sought to extend leases in the area or sell any land until a strategic plan is in place.

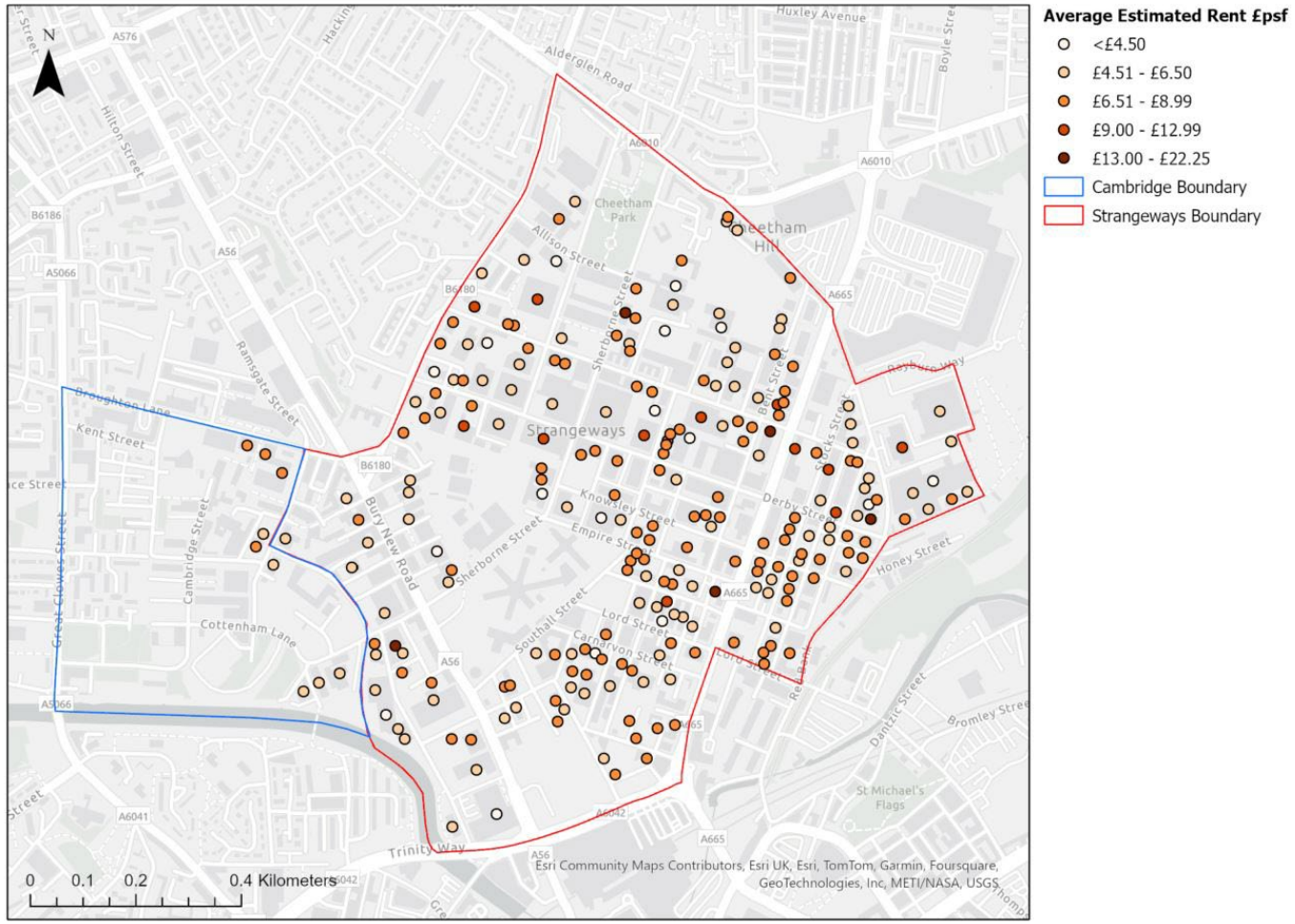
Commercial Rents £ per sq ft in SRF Area, Indexed 2009, Rolling 12m Average



Source: CoStar, accessed 2023

Commercial Industrial rents

Commercial Industrial Rents £ per sq ft in the SRF Area



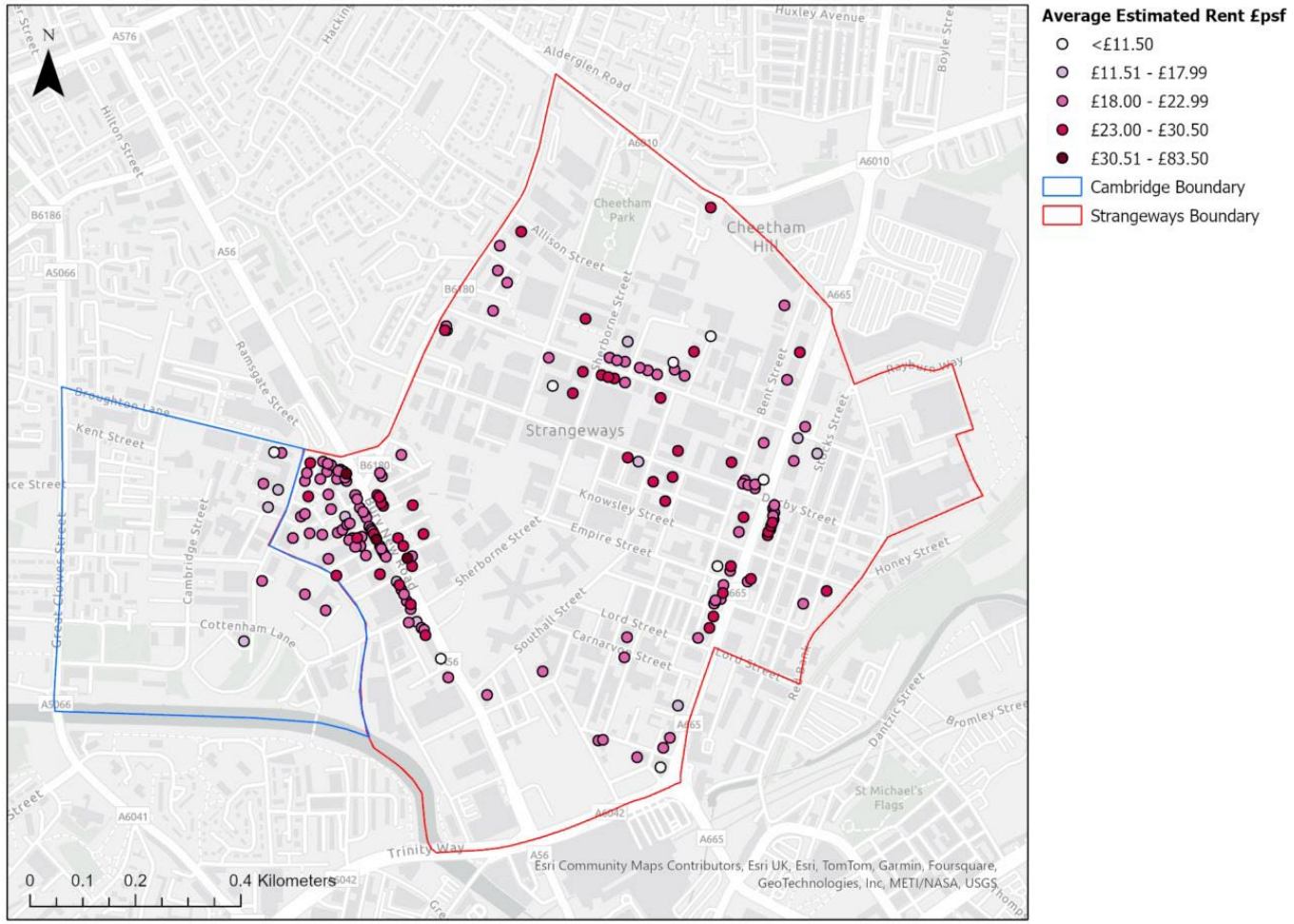
Source: CoStar estimated rents, accessed 2023

Industrial rents:

- Industrial rents generally range between £4.00 and £10.00 per sq ft, with the current average rate at **£6.50.**
- Industrial rents have fallen -**12%** over the past year, having surged over recent years following the Covid-19 pandemic, as in many other locations.
- Higher rates of industrial rents are found to the west of the SRF area, particularly between Debt St and Broughton St.
- Given the importance of the SRF area's arterial roads, it is worth emphasising that Cheetham Hill Road is more aligned with the industrial economy in the area – which is reflected in the fact that the Trade City site is being constructed at the northern end of this corridor.
- In contrast, lower rental levels are found along Bury New Road and to the north east of the SRF area.
- This reflects varying levels of stock and occupier interest across the SRF area.
- The office sector in the area is too small in the SRF area to accommodate in this geographic analysis. It is mostly limited to small floorplate units across conversions of historic buildings or more modern industrial units.

Commercial Retail Rents

Commercial Retail Rents £ per sq ft in the SRF area



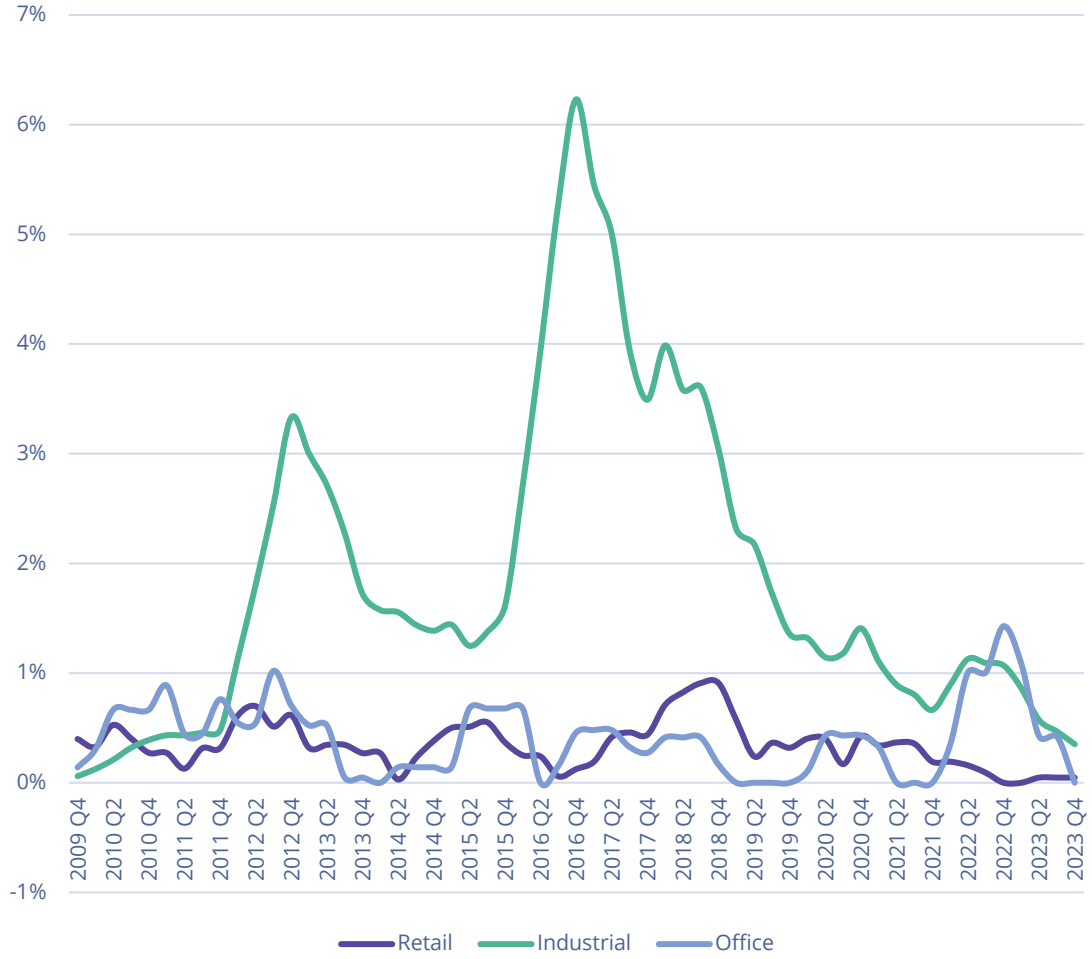
Source: CoStar estimated rents, accessed 2023

Retail rents:

- Retail rents range from £11.00 – £20.00 per sq ft across the SRF area, currently averaging **£15.80 per sq ft.**
- Retail rents in the SRF area have increased by **18%** over the past year, continuing the sector's recovery in the area, now at 2012 levels.
- The retail sector is far more concentrated along the two arterial roads as well as Deby St.
- The area's highest rents appear slightly more concentrated along Bury New Road, which reflects the greater vibrancy of retail activity in the area.
- The area's lowest retail rents are found in the more peripheral areas adjacent to Bury New Road and Derby St, as well as the northern end of Cheetham Hill Road.
- The office sector in the area is too small to accommodate in this geographic analysis.

Commercial Take-Up & Development

Commercial Real Estate Take-Up as Proportion of Total Stock Floorspace, 12m Rolling Average



Source: CoStar, accessed 2023

Commercial Real Estate Total Stock Floorspace, Indexed 2009 = 100



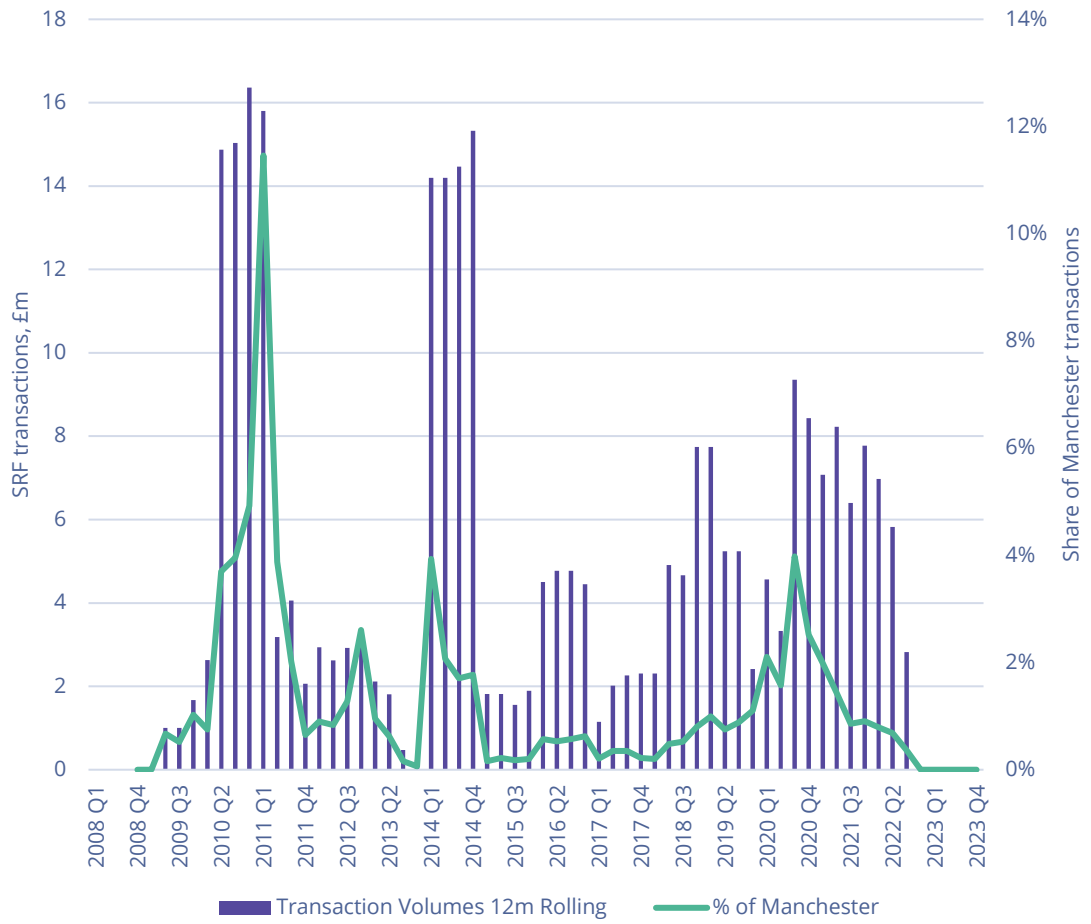
Source: CoStar, accessed 2023

Real Estate market:

- Retail and office take-up has remained mostly below **1%** churn of total stock, reflecting a relatively stable business community.
- Industrial take-up has generally been higher as a proportion of stock, peaking at **3.3%** and **6.2%** in 2012 and 2016 respectively.
- Since the 2016 peak in industrial activity, there has been far more limited take-up churn.
- Industrial and office stock floorspace has remained **stable or declined** since 2009, indicating a lack of demand.
- Retail stock **has increased**, which, along with limited churn, may have helped to keep rents more subdued as shown on the previous page.
- Whilst not captured in the data at present the recent completion of Trade City Manchester by Kier Properties highlights the ongoing demand for good quality, flexible, industrial space in the study area and the market interest in delivering new space where land is made available.

Commercial Investment & Development

Investment Transactions in the SRF Area, £m Rolling, Total and Share of all Manchester Activity



Source: CoStar, accessed 2023

Top Investors Over the Past Decade

Buyer	Project(s)	£ Transacted
St James's Place Property Unit Trust / Orchard Street Investment Management LLP	Travelodge (2014)	£14,200,000
Kier Property Developments Ltd	Trade City (2021)	£4,200,000
Kamani Global Investments Ltd	Cheetwood House (2018)	£3,000,000
Fg Park Limited	1 Park Pl	£1,242,500
Aliyah Investments Ltd	54 Bent St	£890,000
Kacoo Investments Limited	155-157 Cheetham Hill Rd	£765,000
Corporaterealm Ltd	Former William Lindop Ltd	£540,000

Source: RCA, accessed 2023

Investment and development activity:

- The SRF area has seen generally low levels of investment activity over the past 15 years, although arguably improving from 2015 onwards in line with the area's GVA trends.
- There are just four named companies who have invested over £1m over the past decade.
- Most development activity has been concentrated in three areas: 1) The **Boddingtons Brewery** site adjacent to Victoria, where the Manchester College and Travelodge buildings have come forward; 2) scattered units across the **Derby St/Broughton St** area, mainly for retail and distribution uses; 3) the northern boundary of the SRF area adjacent to **Elizabeth St**, where Kier's Trade City has recently been completed, Cheetwood House was purchased in 2018, and where the Jamia Tul Muntazir mosque construction site has been abandoned for several years.
- Investment levels in the SRF area have seen three significant spikes over the past 15 years: in 2010, 2014, and a more consistent level of activity from 2018-2022. As in much of the UK, activity has not returned since the BoE's rate hiking cycle began in 2022.
- During this time, investment levels reached a maximum **11%** share of total Manchester activity during 2010. Since then, the maximum achieved in a single 12-month period was **4%** in both 2014 and 2020.

Business rates

Distribution of Net Business Rates Liabilities by Level of Liability, 2023
I.e. a total of £1.87m is raised by all businesses with net liabilities of £100,000 or higher



Source: Avison Young analysis of data provided by Manchester City Council and Salford City Council.

Level of Gross and Net Business Rates Liability by Local Authority

	Manchester	Salford	Total
Gross Liability (before reliefs)	£14,881,841	£4,692,861	£19,574,702
Net Liability (after reliefs)	£7,136,473	£434,092	£7,570,564
Relief	£7,745,368	£4,258,770	£12,004,138
Relief rate (relief / gross liability)	52%	91%	61%

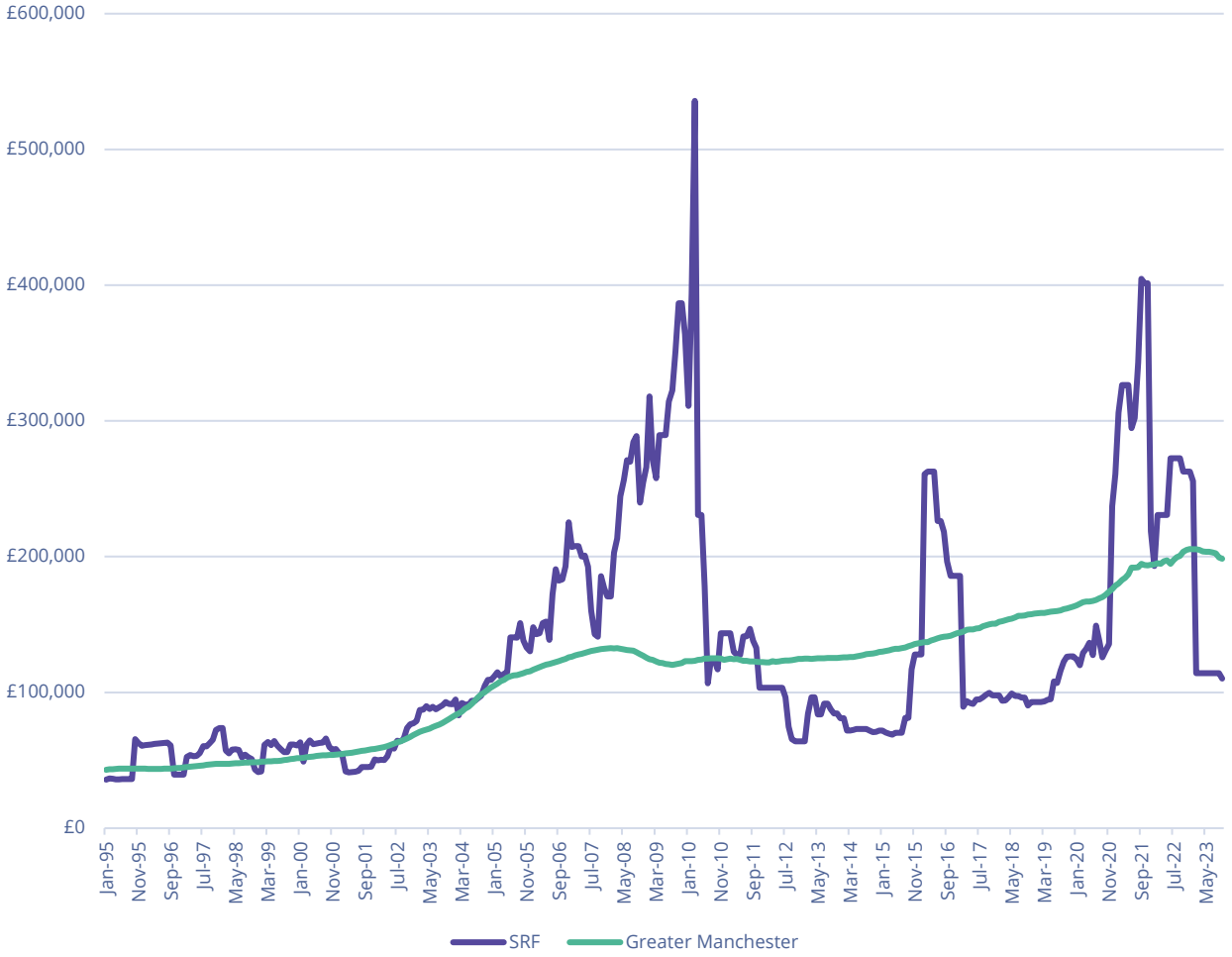
Source: Avison Young analysis of data provided by Manchester City Council and Salford City Council.

Analysis of Business Rates Data:

- Total net liabilities (after reliefs) in the SRF area total £7.6m, with a total £12m of relief being provided mainly through small business rates.
- Manchester's gross liability is over three times high than Salford's, reflecting its larger business base. Once relief is accounted for, Manchester's net liability is 16x that of Salford's, likely owing to the dominance of smaller businesses in the Cambridge area.
- Of all net liabilities, there are 65 businesses (3% of total) in the SRF area which account for half of total net liabilities. Of these, just three are businesses located in Salford. The chart on the left of this page shows the contribution of business at each level of contribution.

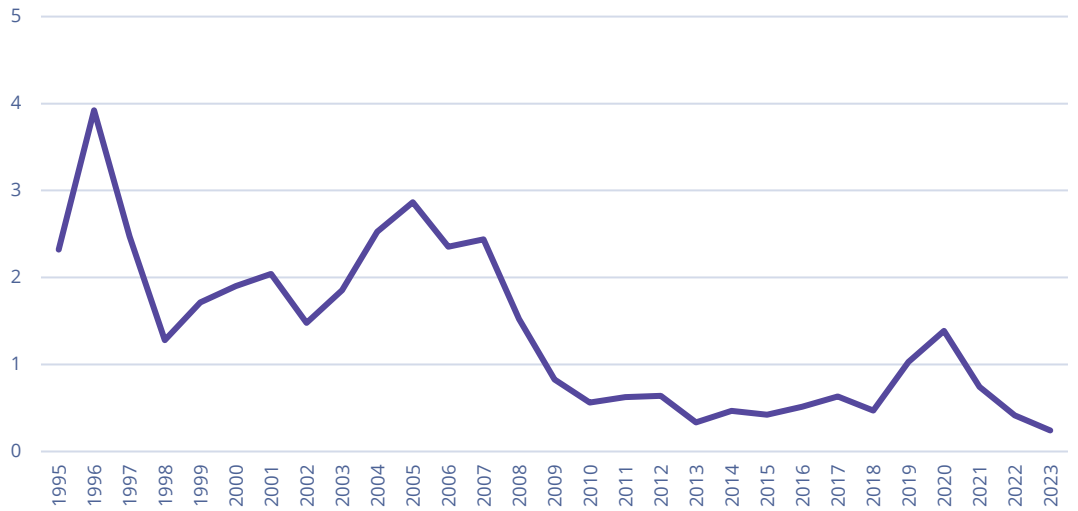
Residential Market

Residential Market Sales Average Prices (1995 – 2023)



Source: Land Registry Data, Accessed via Realyse

Rolling Average Monthly Sale Transactions (1995 – 2023)



Residential Market:

- The SRF area has a limited housing stock, of which the vast majority are non-open market tenures. As such, the fluctuations in pricing can be regarded as anomalies created by the infrequent sales of market housing.
- The spikes in pricing seen in 2008, 2016 and 2021 are reflective of concurrent activity in the national housing market, and therefore is likely indicative of property speculation and a greater mix of larger houses coming to the market during those periods.
- The area today is priced lower than the Greater Manchester average.
- Over the 30 year period, the area has seen very low levels of residential transactions, driven mainly by the lack of total stock. Notably, transaction levels of fallen over the period, now averaging less than **0.5** transactions per month on average.

Real Estate Market Key Findings & Discussion

Key question: What are the key real estate trends which underpin economic activity and will inform the SRF going forward?"

- Vacancy rates are generally low, and especially so in retail and industrial uses. Anecdotally, businesses and landlords report that turnover is relatively low and occupier demand for space is strong.
- Rents for industrial space have risen over the past decade, whilst retail rents have lagged, and office rents fluctuated with the delivery of new suites to a relatively smaller market.
- The area around Broughton Street and Derby Street, the hotspot for wholesaling activity, attracts the highest industrial rents across the area. Retail rents are generally higher on arterial routes.
- Retail and office take-up has remained generally low, with limited turnover. The industrial sector has seen greater levels of take-up, although this has declined substantially from its peak in 2016.
- The area has seen generally low level of investment activity over the past 15 years, with just four property transactions greater than £1m over the period. The most significant commercial developments in the area have been the Travelodge, Trade City – the latter highlighting ongoing developer interest in providing modern industrial space.
- Business rates net liabilities in the area total £7.6m, from a gross liability of £12m. This represents a significant (61%) level of relief across the area, with Salford having by far a higher rate of relief at 91%.
- The area's residential market has seen significant fluctuation in pricing of the past couple decades due to the relatively small size of the local market. The level of transactions has fallen consistently over the period, not having recovered from the steep declines seen after the 2008 financial crisis.

Discussion:

- Demand for real estate has shifted with the area's changing economic and business priorities. With the gradual transition from the textile wholesale trade towards textile retail and wholesale of other products, businesses have generally demanded smaller units.
- Moreover, these types of smaller spaces (usually in the form of offices) are also in demand amongst emerging sectors such as the professional services and ecommerce sectors.
- There does, however, remain significant vacancy in selected parts of the SRF area and blight of property condition. Businesses reported challenges with issues such as fly tipping and criminal activity. In the Cambridge area, concerns around flooding have held back investment in real estate.
- Operation Vulcan has helped to alleviate some issues of criminal activity and safety concerns along Bury New Road. Steps are also being taken to improve the quality of the local environment in the short-term, ahead of long-term investment in the area.

Conclusions



Conclusions

The SRF area presents a significant economic asset to the city-region, hosting a large number of businesses that generate/support a significant level of jobs and economic value within Manchester and Salford. Importantly, the research suggests that there is a strong local impact from this economic activity, with businesses reporting significant employment of people living in the immediate vicinity of the area, a range of local 'business to business' relationships, and a focus of trade with other businesses within Greater Manchester.

Data suggests that for a long time the economy of the area has been relatively stable, with limited change in the sectoral mix, the ongoing presence of a number of established businesses, low property vacancy rates and a broadly consistent property value profile across the area.

There is, however, more change now occurring within the SRF area, evident both in the data and the qualitative analysis presented in this report. This conclusions sets out some of the key themes of the SRF's area's economy.

The Traditional Economy Remains Strong

Overall, the area has retained a core focus on the textile industry, meaning its economic heritage remains intact to some degree. The focus of that activity is mainly aligned to the wholesale and distribution of textiles and clothing rather than manufacturing, with only a small number of production-based business remaining – with the most prominent being Private White V.C. located in the Cambridge area.

The other key remaining manufacturer is Joseph Holt Brewery who have a significant presence on Empire Street and who are the last major brewery to remain in the area. Both these manufacturers have a national and global presence, and demonstrate how genuine industrial activity can thrive in such an urban setting.

Generally, the area remains dominated by wholesale and distribution activities, but in recent years the nature of wholesale goods has broadened. This is a reflection of the entrepreneurs and businesspeople in the area as much as the strategic changes to the sector/economy, with existing business leaders being quick to spot new opportunities and apply expertise to new products. The presence of a significant cluster of vape-related product wholesalers is the prime example of this level of entrepreneurship, with a number of businesses understood to be operated by former textile wholesalers.

From business engagement conversations it is evident that location is important to the wholesale businesses, with the area conveying a value in terms of perception and profile of the location as a hub that draws customers. The "Cheetham Hill Traders" have a significant draw, with clients coming from across the UK to access multiple wholesalers and goods in one location, as such the critical mass of offer is considered to be key to the success of the operators locally. Conversely over time the relationship between the wholesale activity and the functioning of the central city economy have become weaker, meaning there is less direct benefit from being so close to the city centre.

Despite the strengths of the area and businesses within it, the future of the wholesale activity is less certain with a range of challenges affecting its prospects. These include increasing online competition, the UK's exit from the EU, changing consumer habits, declining interest of younger generations to continue running family businesses, and declining functionality of the built stock. Legislative changes will affect the vape industry in particular.

In combination these factors suggest that while the wholesale sector has been a constant in the area for generations, its dominant role may change in the future creating a need/opportunity for new types of activity to grow.

A New Economy Emerging

The 2015 CLES study identified little signs of change in the economic mix and make up of the area, with the main change considered to be a shift towards direct retailing of the existing business base. Unsurprisingly given the wider headwinds the retail sector has faced in the last decade there is limited evidence this has come to pass.

However, the economy has begun to change in other ways that are distinctive with new uses emerging that reflect both the communities that have used the area historically and opportunities the properties themselves present them.

Conclusions

The most significant 'new' activities within the area are grouped within a small number of sectors, most notably:

Creative Production:
- Some have roots back to the area's heritage in textiles, most notably The Yard Atelier and Private White.
- Others are more space and cost driven, such as Pirate Studios, The Yard workspaces, Studio 88.

Entertainment / Culture:
- A unique 'grassroots' cluster of late night venues has emerged including Hidden, the White Hotel and the Derby Brewers Arms (DBA) which are now a destination for many people and informally work as a 'group' of venues colloquially referred to as The Strange Quarter.
- Alternative cultural/performance venue within The Yard which caters to a different clientele to the other venues

Banqueting Halls:
- The area is now home to 4 major wedding venues/halls that cater predominantly to Asian and African communities.

Leisure, health and fitness:
- Large volume buildings have been repurposed to provide a range of active leisure space including Rockover Climbing Centre, Predators MMZ and BJJ Academy Manchester and Kickair. Albeit some of these occupiers are operating under temporary licenses.

All of these enterprises draw significant numbers of visitors to the area, thereby placing a significance on the quality of environment and personal safety within the public realm. They also contribute to the wider cultural appeal of the city. Crucially, these uses appear to work harmoniously with the more 'traditional' offer rather than create significant issues.

Engagement with and survey results from the owners/operators of these businesses suggest many are deeply invested in the area and keen to be part of its future, potentially through larger scale activity and creation of additional new 'offers'.

A Need to Invest in the Area

What is common across both the traditional and new economies is the need to ensure the area functions well and meets their needs going forward, making it as easy as possible to trade in the area.

Operation Vulcan has had a positive impact in that regard, with businesses reporting they were often tainted by the levels of illegality and suffered a fall in custom as a result. However now those business premises have been vacated (and left vacant) the 'blight' around the Moulton St/Bury New Road area is reportedly having an impact both on 'footfall' and perceptions of the area. Steps are also being taken to improve the quality of the local environment in the short-term, ahead of long-term investment in the area.

Businesses reported through surveys and in-person engagement the significant impacts of fly tipping, poor highway maintenance, anti-social behaviour and frequent 'low level' criminal activity on the quality of the local environment. The newer uses in particular highlighted these as issues given their reliance on drawing visitors and businesses to the area and the deterring effect poor perceptions of the area had. Some businesses in our survey cited weak internet connectivity in the area.

In some areas all businesses highlighted challenges with vehicle 'conflicts' most notably linked to the ability to service businesses given the level of on street parking. Additionally, the quality of pedestrian/cycle infrastructure was a challenge for those businesses that draw on local residents for their workforce.

A range of issues linked to flood risk, landowner aspirations and a lack of certainty about the future of the area are impacting private sector investment in the area as securing insurance, planning consent or lease extensions is more difficult. However, as the Trade City development highlights, where sites are available there is market appetite to deliver modern industrial spaces.

Overall, a coordinated approach to addressing the appearance and functioning of the area today will greatly enhance the area's economic performance and create foundations for future growth and change.

Conclusions

A Significant Contribution to Achieving Strategic Economic Objectives

Positive planning of the area's economic growth can have a positive impact on both existing business operations and the delivery of city-wide economic priorities as established in Manchester City Council's 2023 Economic Strategy "Investing in Success" and Salford City Council's 2021 Inclusive Growth Strategy.

Most notably the future economic focus for the area can contribute meaningfully towards:

- **Inclusive Growth –** the area is already a part of the city that provides opportunities across a diverse range of demographic, ethnic and socio-economic groups. Building on its deep heritage of embracing immigrant communities and giving them a place to build a livelihood can continue to deliver accessible new economic opportunities.
- **Transition to Zero Carbon –** through improving the environmental performance of the public realm, built stock, movement network and existing business base the area can significantly reduce its carbon footprint. This could include new facilities, such as materials exchanges, that support city-wide initiatives towards a greener future.
- **A Range of Opportunities –** the area already provides a spectrum of roles and occupations meaning those with entry level through to high level skills and qualifications can find work. Looking forward these roles will still exist and can be complemented by high productivity opportunities in a range of sectors.
- **Technology and smart growth –** the integration of new technologies, digital processes and green policies into the existing business base will be central to optimising to area's contribution to strategic economic objectives.

An Authentic Future

The generations of business evolution in the area have always reflected the communities that surround it and, indeed, drive the economy and character of the city. Therefore in the past the area has always had a deep and intrinsic link to the city economy and its success.

A transition in this relationship has occurred in more recent times as the offer of the city core has changed towards more professional and financial services, weakening the bonds that tied the locations together.

As such the area no longer reflects the central city economy or provides a source of goods/services that support its functioning, meaning in many respects it has become more isolated from the city economy and more linked to wider sub-regional (and beyond) demand across both traditional and some of the 'new' activities.

This is not to diminish the potential importance of Strangeways and Cambridge in supporting economic growth across both councils areas. There are numerous opportunities across the SRF area to better utilise existing spaces and bring buildings back into use – both to support existing economic activity, but also to meet the demand for new workspace arsing as the city core becomes increasingly expensive.

Given the various uncertainties surrounding the long term operation of wholesale businesses within the area and the relatively limited scale of 'new economy' at this point there will need to be positive support and direction provided via the SRF and the development approach it takes.

Both the existing business base (which is likely to remain in a large part) and the area's built and community heritage offer an opportunity for future growth to be 'authentic' to the area and a distinct part of the wider city economy – rather than a repetition of what has been achieved at the likes of Ancoats, the Northern Quarter and Salford Quays. For example:

- The past and present activity in the textile sector makes the area an ideal location for work linked to 'future fabrics' as all businesses in the sector will need to integrate it into their future approaches. There is the potential to link to city and region wide networks that are leading innovation in the sector, including Manchester Fashion Institute.

Conclusions

- Ongoing production, manufacturing and distribution can also be drivers of new activity as these industries become increasingly digitised, presenting opportunities for research and new business activity in automation, low carbon vehicles and digital platforms.
- Sustainability and the green economy is also opportunity for the area, given the presence of larger units that may lend themselves to workshops or 'upcycling' type enterprises.

Such sectors can become central pillars of the Manchester economy but need a place for ideas to be shared and businesses developed. Strangeways and Cambridge offers such a place: a location with a rich heritage of industry and entrepreneurialism that has demonstrated continuous economic evolution, and which can now help to support the ongoing growth of the Manchester and Salford economies.

Implications for SRF

In realising the potential of the SRF area to harness future economic growth it is important to recognise the assets that are already in place and not simply sweep these away in pursuit of future growth. There are therefore a series of opportunities within the SRF which respond to shorter and longer-term challenges.

The many business and sector opportunities are likely to be best realised by working more harmoniously within the framework provided by the business, cultural and built heritage of the area. Increasingly businesses are seeking to locate in dynamic, culturally distinctive places that help attract workers and occupy spaces that reflect their identity. Across Europe the city fringes have become the focus for innovation and creativity, repopulating buildings that once housed industries like the textile trade but can be adapted for a range of uses.

As the SRF is delivered it will need to manage the relationships between different uses, especially as more residents move to the area. Today the area offers a relatively harmonious place for business, culture and the night time economy to co-exist and land use mix and ‘agent of change’ principles will need careful consideration if this is not to be undermined.

Through careful curation of space, place and business the SRF can unlock a host of opportunities to deliver the economic objectives of Manchester and Salford by protecting and attracting high quality jobs, encouraging innovation, shifting to more sustainable business models and providing employment opportunities that are relevant and accessible to the local community.


AVISON
YOUNG
WHOLESALE
WOMENS
EXCLUSIVE
BRANDS
IT'S ALL ABOUT THE CLASS
READY
TO WEAR
COLLECTION
INSPIRED BY
NEW
LIFESTYLE
NEW
ARRIVAL
REMO APPAREL
Apple
Chic & Klassy
ANOTHER LOOK

Appendix

Key Economic Facts

Sources: ONS, FAME, IDBR, Experian, Manchester City Council and Salford City Council. Details of sources found on relevant pages of this report.

**ONS data adjusted by subtracting an estimated population which fall within the defined statistical boundaries but outside the SRF boundary. This is based on a count of dwellings multiplied by 2.4 persons per household.*

	Manchester	Salford
Residents: 2,092*	1,671	420
GVA: £618m	£542m	£76m
Businesses: 3,126	2,932	194
Employment:14,290	12,865	1,425
Business Rates: £7.57m (net liabilities)	£7.14m	£0.43m