

Submission of Evidence Form – National Development Framework

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Date

February 2017

Title of evidence

Joint Wrexham and Flintshire Employment Land Review (October 2015)

Summary of evidence

The evidence is an up to date review of the employment land needs of each LPA which has been prepared to inform each respective LPA's LDP.

Summary of key issues/conclusions

Specifically for Wrexham, the evidence suggests that there is a need for an extension to the Wrexham Industrial Estate (WIE) of between 20 -30ha net of any ecological mitigation (for newts), see para 10.99 and 10.100 (page 310 – 312 of the [Joint Employment Land Review Report \(Oct 2015\)](#). This need has been highlighted in the Council's LDP Preferred Strategy (February 2015). Work has commenced within the LDP team to scope 2 preferred areas of search for such an extension which are detailed in background paper 5: [Wrexham Industrial Estate Site Expansion \(Feb 2016\)](#).

Why have you submitted this evidence?

Wrexham Industrial Estate (WIE) is one of the largest industrial areas in Europe, it is critical to the success of not only the north Wales and Mersey Dee area but the rest of Wales and the UK in economic terms. We continue to believe that the estate is a key business sector area (as is currently recognised in the Wales Spatial Plan update, 2008) and that any future expansion as identified by the evidence is of greater than local importance. This is reiterated in the evidence (para 10.49, and table 133 and 125 – page 296 of the joint ELR(2015) which describes the WIE (amongst other sites in the County) as a '*High quality, prestigious, flagship business areas due to their scale, location and setting. Capable of competing for investment in the regional market place. These are prime sites for marketing to a cross section of users including new inward investors. They can also meet the needs of image-conscious, aspirational companies already in the local authority area*' A number of the manufacturing business on the estate trade internationally,

securing an extension to the WIE would continue to allow this to happen and would also support the objectives of the Council in supporting a strong and vibrant economy in this part of Wales with benefits for local communities.

How should this evidence inform the development of the NDF?

The evidence could be used in the following ways:

- To help set out the NDF's approach to the scale and spatial location of nationally important growth areas (WIE) and proposals (extension);
- Highlight the interrelationship of such key growth areas with the rest of North Wales (in the context of the North Wales Growth bid and work of the Economic Ambition Board) and the wider Mersey Dee area beyond to the northern powerhouse and city deals of Liverpool and Manchester;
- Demonstrate Welsh Governments commitment to supporting the growth of the North Wales economy;
- reiterate the need to consider how we manage our natural assets and protected species on a strategic scale via a green infrastructure / ecosystem services based approach as advocated in the Environment Act

How does this evidence and any actions it recommends help achieve the 7 well-being goals?

Wellbeing Goal	How the evidence supports the Goal
A prosperous Wales	Supports the Welsh economy, generating wealth, jobs and employment opportunities and allows people to take advantage of the wealth generated through securing decent work. The proposal would also help to develop a more skilled workforce, in an area close to one of the most deprived areas in Wales (Caia Park)
A resilient Wales	The WIE supports a variety of protected species and habitats, contributing to the biodiversity of Wales. The proposal to extend the WIE presents an opportunity to implement and manage on a strategic scale a green network or corridor which would ensure the continued protection and management of protected species and habitat to the benefit of social, ecological and economic resilience in the long term.
A healthier Wales	The WIE is well accessed by public

	transport, walking and cycling which benefit peoples health and wellbeing. In addition, the proximity of the site to one of Wales most deprived areas will help secure economic benefits, resulting in better health outcomes for those people.
A more equal Wales	The proposal would allow people to achieve their potential on a number of elements (skills, wealth, health, access to employment) no matter what their background or circumstances
A Wales of cohesive communities	The WIE is well connected by a number of modes of transport and the proposal, through good design principles including a strong ecological network would provide an attractive, safe and viable environment for people to prosper.
A Wales of vibrant language and thriving Welsh culture	Providing employment opportunities to society will allow people to participate in other cultural, sport and leisure pursuits, improving skills, education, health and social outcomes
A globally responsible Wales	The proposal would make a positive contribution to local and global wellbeing by improving opportunities to access employment opportunities and upskill.

Why is the evidence of national significance?

Wrexham Industrial Estate is one of the largest industrial areas in Europe, it is critical to the success of not only the north Wales and Mersey Dee area but the rest of Wales and the UK in economic terms. We believe that the estate is of national importance as reflected by the evidence and that the status of the WIE should be recognised as such within the NDF. Any future expansion of the WIE as supported by the evidence would also be nationally important.

Do you agree for your evidence to be made public? (Only evidence that can be made public will inform the development of the NDF)

Yes, the evidence is already in the public domain due to the work undertaken to date on the LDP Preferred Strategy including the accompanying evidence base: <http://wrexhamldp.wrexham.gov.uk/portal/ldp/ps/ps2016> and http://wrexhamldp.wrexham.gov.uk/portal/ldp_ebsd

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The primary piece of evidence is the Wrexham Strategic Road Network Capacity and Improvement Study (March 2016) which can be found here:

http://wrexhamldp.wrexham.gov.uk/portal/ldp_ebsd

There are also other related pieces of evidence which support the above as follows:

- Wrexham Strategic Road Network: Economic Impact Study (Development Economics, April 2016)
- Wrexham Connected (Sustainable Urban Mobility Plan (SUMP) and Transport Hub Study, 2016) https://www.wrexham.gov.uk/english/council/documents/wrexham_connected.htm

Furthermore, the Council have recently jointly procured with Welsh Government a further study looking at junctions 4 and 5 of the A483(T) and a WelTag study of all A483(T) junctions within the County boundary which is due for completion in June 2017.

Summary of evidence

The study sought to provide a baseline position of the capacity issues associated with certain junctions along the A483T within the context of accommodating new growth in housing and employment in the County in the future. A series of technical traffic models were developed to examine and quantify the existing performance of the following junctions:

- Junction 3 (Rhostyllen);
- Junction 4 (Ruthin Rd);
- Junction 5 (Mold Rd); and
- Junction 6 (Gresford)

As part of the study, the report identifies a number of high level interventions

which could provide the necessary capacity improvements required to accommodate for the level of traffic growth forecast on the A483(T) and junctions.

A high level estimate of costs has also been developed in relation to the junction capacity improvement options identified in the report. These are infrastructure costs only and exclude allowances for preliminary works including scheme design, service diversions, land purchase, ground conditions and trunk road working conditions etc. Moreover, no estimate has been developed for the identified need to upgrade existing merge and diverge lanes at this stage. The current procurement will look at these issues in more detail.

Summary of key issues/conclusions

The outcome of the baseline model assessment work is summarised as follows:

- Junction 3 is operating within capacity;
- Junction 4 operates over capacity;
- Junction 5 operates over theoretical capacity but within total capacity;
- Junction 6 operates over theoretical capacity but within total capacity;
- A number of existing merge and diverge layouts (slip roads) have been identified as requiring upgrading to accommodate existing traffic demands

The potential interventions required for those junctions operating over capacity include:

- Increased capacity at Junction 4 through provision of a new larger grade separated gyratory;
- Upgrade existing merge and diverge lanes (Slip Roads) at Junction 4 through to Junction 6 effectively widening the A483(T) from 2 lanes to 3;
- Increased capacity at Junction 5 (Gresford) through provision of grade separation of the A483(T) to A5156 Llan-Y-Pwll Link Road movement

Why have you submitted this evidence?

We believe that the NDF should identify key national infrastructure requirements to support the delivery of new growth and economic ambition in Wales, in particular around identified areas of key strategic sites for housing and employment. The current Wales Spatial Plan (WSP, 2008) identifies Wrexham as a key settlement of national importance, something which we believe should be replicated in the NDF going forward. This evidence begins to quantify the capacity issues associated with our current infrastructure which highlights potential barriers to the delivery of further growth in the area which would have significant economic implications if not realised.

How should this evidence inform the development of the NDF?

- To help set out the NDF's approach to the scale and spatial location of

<p>nationally important growth areas (Wrexham Town) and strategic proposals (planned housing and economic growth);</p> <ul style="list-style-type: none"> • To help prioritise the delivery of nationally significant infrastructure requirements (upgrades to junctions along the strategic A483 (T) road network) to aid the growth and wellbeing of new and existing communities; • To highlight and provide certainty to stakeholders about required infrastructure investment, funding sources and likely timescales – it would be useful if there could be a supporting infrastructure delivery plan alongside the NDF (similar to the Wales Infrastructure Investment Plan) outlining key timings and sources of funding for nationally important infrastructure requirements such as those identified in by the evidence;

How does this evidence and any actions it recommends help achieve the 7 well-being goals?

Wellbeing Goal	How the evidence supports the Goal
A prosperous Wales	Supports the Welsh economy, generating wealth, jobs and employment opportunities by allowing the release of a long standing employment allocation (Western Gateway) which has the potential for circa 1000 + jobs and the release of a key strategic housing proposal (approx. 1500 new homes and a new school) which will include employment as part of the construction phase. Improved infrastructure will also help regenerate Wrexham Town centre by improving accessibility to key facilities and services, including further employment opportunities within the town.
A resilient Wales	The proposals would make the best use of natural environment assets to ensure continued ecological connectivity and resilience for people living and working in proximity to the scheme.
A healthier Wales	The proposal would be of benefit to people's health and mental wellbeing, being able to access facilities and services in a timelier manner, in an environment which has been designed to maximise people's health and wellbeing.
A more equal Wales	The proposal would allow people to

	achieve their potential on a number of elements (skills, wealth, health, access to employment and homes) no matter what their background or circumstances
A Wales of cohesive communities	The proposal would improve the accessibility of the more deprived and remote communities to facilities within the town and the detailed design stage would ensure attractive and safe environments for people to live and work.
A Wales of vibrant language and thriving Welsh culture	Providing housing and employment opportunities to society will allow people to participate in other cultural, sport and leisure pursuits, improving skills, education, health and social outcomes in a location close to a number of readily available facilities and amenities.
A globally responsible Wales	The proposal would make a positive contribution to local and global wellbeing, reducing travel times, improving access to homes and jobs and other vital services within the town centre.

Why is the evidence of national significance?

The evidence helps to reiterate the importance of supporting the growth of Wrexham town, a settlement of national importance as identified in the current WSP. The evidence highlights current, potentially significant barriers to supporting new growth in both housing and economic development which, if not realised could have significant economic implications for the County (see economic impact study (April 2016)).

Do you agree for your evidence to be made public? (Only evidence that can be made public will inform the development of the NDF)

Yes

Wrexham Strategic Road Network: Economic Impact Study

April 2016



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1: Executive Summary

Background

- 1.1 Development Economics Limited was appointed by Wrexham County Borough Council (WCBC) to identify the potential effects on the local economy of delivering improvements to junctions serving the A483 trunk road as it passes through Wrexham. It is widely acknowledged that some of the junctions with the A483(T) suffer from periods of congestion, most notably the A525 Ruthin Rd and A541 Mold Rd junctions. Whilst this delay is generally confined to the AM and PM peaks, there is evidence that increasing levels of congestion in this area is creating challenges for businesses and other employers located in the vicinity.
- 1.2 WCBC appointed Capita in 2015 to undertake an assessment of the strategic road network in and around the main settlement of Wrexham. This work has confirmed that the junctions are experiencing increasing capacity problems. Capita have identified high level interventions which, if deliverable, could afford the necessary capacity improvements required to accommodate forecast growth.
- 1.3 The proposed interventions involve significant capital investment in new highway infrastructure. The most significant of these interventions is a new grade separated gyratory at Junction 4, but Capita have also identified the need to upgrade existing merge and diverge lanes at Junction 4 through to 6, effectively resulting in the need for additional lane capacity between these junctions.
- 1.4 Capita have undertaken a high level assessment of the costs of providing the necessary junction infrastructure capacity improvements. The identified figure is approximately £9.88 million, but this excludes any cost allowances for service diversions, land purchase, ground conditions or trunk road working conditions. Moreover, there has as yet been no cost estimates developed for the identified need to upgrade existing merge and diverges and widening of the A483 from junction 4 through to 6.

Strategic context and challenges

- 1.5 Wrexham is confirmed in the Wales Spatial Plan (2008) as a principal location for employment, health and education services that is important for North Wales as a whole. Within Wrexham, the Wrexham Technology Park/ Ruthin Road Development Area is acknowledged as providing high levels of current employment, as well as significant levels of future employment-yielding development opportunity.
- 1.6 The importance of the Western Gateway area for employment and its role in helping to develop a knowledge economy locally is acknowledged in the emerging Local Development Plan and supporting evidence base, including the recent Employment Land Review. The strategic importance of Wrexham Technology Park as a location of future employment opportunity has also been confirmed in recent work undertaken by the Mersey Dee Alliance and also by the North Wales Economic Ambition Board.

Scale of development opportunity that could be released

- 1.7 The scale of this opportunity has been quantified as part of this study. Having reviewed this potential pipeline of residential and commercial development schemes (but ignoring those that are already underway or which have received planning permission):
- the schemes stand to deliver an additional £186million (2016 prices) of construction expenditure investment (but excluding expenditure on land costs and off site infrastructure); and
 - the schemes are also potentially capable of supporting nearly 1,840 person years of gross construction phase employment, which would also translate to 1,135 of net local (Wrexham) employment once additionality factors (leakage, displacement, etc.) are taken into account.
- 1.8 The potential future development schemes that are capable of yielding future permanent employment are estimated to be capable of hosting 615 gross jobs once they are built and fully occupied as currently envisaged. When additionality factors are taken into account, these gross jobs are expected to translate to:
- 531 net additional jobs at the spatial level of Wrexham County Borough
 - 365 net additional jobs at the spatial level of Wales as a whole.
- 1.9 In terms of additional economic output, when additionality factors are taken into account, the net additional economic output is estimated to be worth:
- £50.2 million per annum (2013 prices) in additional GVA at the spatial level of Wrexham County Borough
 - £33.9 million per annum (2013 prices) in additional GVA at the spatial level of Wales as a whole.
- 1.10 However, it must be emphasised that the realisation of all of these additional employment and economic output growth opportunities will be dependent on addressing successfully the existing and expected future traffic congestion problems at the A483 junctions.
- 1.11 The Preferred Strategy for the LDP has also identified the Lower Berse Farm site off Ruthin Road as being a Key Strategic Site which is expected to be a major contributor to Wrexham's future housing land supply. Moreover, the delivery of this site would be expected to contribute around 10% of the overall volume of housing development identified by the LDP is being required over the period of the Plan (11,715 new homes). The housing target identified by the LDP is itself based on variants of Welsh Government population projections for the Wrexham area.
- 1.12 Forecasts obtained by the Council for use in the Employment Land Review study¹ indicate that a large proportion of future job growth will occur in sectors that are largely centred on the Western Gateway area, including jobs in Health, Education, Business Support Services and Accommodation services.

¹ http://www.wrexham.gov.uk/assets/pdfs/planning/ldp2/march_2015/employment_land_review_exec_summary.pdf

- 1.13 On that basis, it will be of vital importance that the Council and its partners work to maximise the attractiveness of the Western Gateway area for business occupiers and workers. In particular, it will be important that the Council and its partners strive to overcome any obstacles or constraints to additional business investment and expansion occurring in the Western Gateway area.

Business survey

- 1.14 A survey for this study completed by 30 locally based employers located in properties in the Western area has confirmed that traffic congestion on the A483 junctions on the Wrexham bypass is a significant issue. Of the employers surveyed, 24 (80%) indicated that congestion on the A483 junctions was having a negative effect on their operations.
- 1.15 The main issues experienced by employers reporting negative effects were:
- problems related to staff punctuality and arrival at work; and
 - difficulties caused for staff who need to travel to and from the business location to perform their duties during the course of the working day.
- 1.16 When asked how these negative effects were impinging on their operations, the most frequent responses were:
- Increased stress/pressure on staff (43%)
 - Reduced quality of service to customers/clients (40%)
 - Reduced productivity (30%)
 - Inability to meet client deadlines (27%).
- 1.17 It is also the case that two of the businesses that were interviewed indicated that the deterioration of the situation is causing them to reassess their investment priorities, with the possibility that plans for local expansions either deferred or potentially being abandoned entirely in favour of locations elsewhere.

2: Introduction

- 2.1 Development Economics Limited was appointed by Wrexham County Borough Council in December 2015 to identify and quantify as far as possible the potential effects on the local economy of delivering improvements to junctions serving the A483 trunk road as it passes through Wrexham. In particular, the focus of the study is to examine the effect of existing and forecast capacity constraints on the A483 and impacts on existing businesses and future development opportunities in Wrexham.
- 2.2 It is widely acknowledged that some of the junctions with the A483(T) suffer from periods of congestion, most notably the A525 Ruthin Rd and A541 Mold Rd junctions. Whilst this delay is generally confined to the AM and PM peaks, there is evidence that increasing levels of congestion in this area is creating challenges for businesses and other employers located in the vicinity.
- 2.3 Such challenges include (for some businesses and organisations):
- effects on the recruitment and/or retention of staff;
 - staff punctuality at the start of the working day;
 - difficulties for staff who need to travel to/from the workplace throughout the workday as part of their job;
 - reliability of freight/deliveries arrival and/or dispatch times; and
 - effects on visitors/customers/patients who need to visit premises in the area during the day, particularly at peak times.
- 2.4 Another key consideration is that the area that is served by the increasingly congested junctions is also the location for a number of important commercial and residential development opportunities that are of strategic importance to the future of Wrexham and the wider North East Wales economy. These opportunities include the completion of the development of the Western Gateway employment area that could provide an additional 1,060 or so gross permanent jobs when the currently envisaged schemes are fully built and occupied.
- 2.5 In addition, plans are being developed for a major urban extension on a site south of Ruthin Rd that could provide around 1,260 dwellings as well as some jobs in providing local services. However, any major new development in the Western Gateway area will be dependent on addressing the traffic congestion problems at the strategic junctions that serve the area on the A483.
- 2.6 In addition, there may be potential implications from increasing congestion on the wider regeneration strategy for Wrexham town centre.
- 2.7 Given this background, the purpose of the study is to consider all of these issues in more detail, and to as far as possible quantify the potential longer term impacts on the local economy – as well as the economy of Wales – of failing to address worsening traffic congestion in the area.

- 2.8 Advice from Welsh Government (transport planning and appraisal guidance) makes it clear that proposals for transport improvements should consider the Economic Activity and Location Impacts of potential schemes. It is recommended that such assessments should focus primarily on assessing the employment and economic output (GVA) impacts, in terms of direct, indirect and induced (multiplier) effects. It is also recommended that such assessments should consider effects at two spatial levels: (1) a local spatial impact area and (2) Wales as a whole.
- 2.9 The remainder of this report is structured in the following way:
- Chapter 3 presents contextual information regarding the identified traffic congestion problems in the Western Gateway area, and provides background on a potential solution that is being developed by traffic and transportation consultants who are working for Wrexham CBC.
 - Chapter 4 provides an overview of the strategy and policy context for the development of the Western Gateway area, including the policy context for the emerging Local Development Plan.
 - Chapter 5 describes the recent and current economic characteristics and performance of the Wrexham area, as well as focus on the characteristics of the part of Wrexham Western Gateway area that is the focus of this study.
 - Chapter 6 reports on evidence that existing road traffic conditions are having on the efficiency of businesses already located in the Western Gateway area. The principal evidence used is the feedback gained from a business survey that was undertaken of businesses and other organisations currently occupying premises located in the area.
 - Chapter 7 provides an assessment of the potential gross and net additional economic benefits that could be gained in Wrexham – and for Wales as a whole – if the development constraints were removed and the Western Gateway area was developed in full. The focus of this assessment is on the additional employment and additional economic output that could be delivered by the Western Gateway were it to be developed and occupied to its full potential (and in line with the aspirations of the emerging Local Development Plan).
 - Chapter 8 sets out the conclusions and recommendations of the report.

3: Background and Context

- 3.1 The issue of traffic congestion affecting the strategic road network along the A483 trunk road as it passes through Wrexham has been a growing problem over a number of years. The issue of congestion is a priority for Wrexham Country Borough Council for a number of reasons, including (but not limited to) the following.
- 3.2 Firstly, there is a general concern with respect to safety on the local highway network, with concerns focusing on the potential dangers of the existing infrastructure which due to the increase in traffic volumes over the years is now considered sub-standard. In addition, AM and PM peak demands place significant pressure on existing link and junction capacities leading to delays and potential for standing traffic on the A483. This is currently being managed to the detriment of the County road network.
- 3.3 Secondly, the area that is served by the affected A483 junctions is an important hosting area for key services to the Wrexham residential and business population. Among the key services that are located in the affected area are:
- Wrexham Maelor hospital
 - Glyndwr University
 - Emergency services, notably fire and ambulance services
 - Public transport services, including Wrexham General railway station
 - Retail parks at Plas Coch and off Berse Road, and a supermarket on Ruthin Rd.
- 3.4 Thirdly, the area served by the junctions (especially Junctions 4 & 5) is one of the most important locations for employment in the Wrexham (and North East Wales) area. Wrexham Maelor hospital itself is one of the largest important employers in North Wales, but there are also important private sector employers operating at Wrexham Technology Park and elsewhere along the Mold Rd and Ruthin Rd corridors.
- 3.5 Furthermore, there are significant future commercial development opportunities that lie in the affected area that may not be capable of being developed unless traffic congestion problems are addressed. In particular, there is a major employment site known as the Ruthin Road Development Area that provides a large and very high quality development opportunity that is of key strategic importance to the Wrexham economy. The Joint Employment Land Review undertaken by Wrexham and Flintshire Councils has identified that the development potential of this site (E1.39) cannot be realised “until major improvements are made to the adjoining A483 junction”.
- 3.6 In addition, there is a major strategic development opportunity at a site off the A525 known as Lower Berse Farm that is the potential location for an urban extension for Wrexham. This site has been identified as being capable of hosting around 1,260 dwellings as well as associated education and community facilities. The development of this strategic opportunity will be necessary if Wrexham is to deliver the scale of housing growth that is:

- 3.11 The Capita report, which is currently in draft format, identifies that based upon a 2013 base year, the four main junctions on the A483 serving Wrexham are operating as follows
- Junction 3 is operating within capacity
 - Junction 4 operates marginally over capacity
 - Junction 5 operates over theoretical capacity but within total capacity
 - Junction 6 operates over theoretical capacity but within total capacity
 - A number of existing merge and diverge layouts have been identified as requiring upgrading to accommodate existing traffic demands.
- 3.12 Future years' assessment of the strategic junctions identifies that, by 2028, only Junction 3 is expected to operate within capacity.
- 3.13 As part of the study, Capita have identified high level interventions which if deliverable could afford the necessary capacity improvements required to provide for the growth that is forecast. These interventions involve significant capital investment in new highway infrastructure. The most significant of these proposed interventions is the requirement for new grade separated gyratory at junction 4 and the need to upgrade existing merge and diverge lanes at Junction 4 through to 6, effectively resulting in the need for additional lane capacity between these junctions (i.e. widening the A483 from two to three lanes).
- 3.14 Capita have undertaken a high level assessment of the costs of providing the necessary junction infrastructure capacity improvements, but this excludes any cost allowances for service diversions, land purchase, ground conditions or trunk road working conditions.
- 3.15 There has also at this stage been no cost estimates developed for the identified need to upgrade existing merge and diverges and widening of the A483 from junction 4 through to 6. It is noted in the Capita report that there are numerous constraints that will impact on the delivery of these improvements specifically the requirement for the widening of the A483 including a number of over/under bridges and the requirement for third party land.
- 3.16 Notwithstanding these caveats, the cost estimates provided by Capita for each of the junctions is summarized below.

Table 3-1: Junction improvement construction costs (2015 prices)	
Junction 3	£19,879
Junction 4	£9,494,019
Junction 5	£100,343
Junction 6	£268,218
Total (3-6)	£9,882,459

Source: Wrexham CBC based on Capita report (April 2016)

- 3.17 Given this introduction to the nature of the current and likely future traffic congestion problems, the next step is to provide more information on relevant strategic and planning policy context for the area.

4: Strategic and Development Context

- 4.1 This chapter summarises the national and local planning policy and economic development strategy context that is most relevant to the matters addressed by this study.

Wales Spatial Plan (2008 update)

- 4.2 The Wales Spatial Plan identifies Wrexham County Borough (together with Denbighshire and Flintshire) as making a very important contribution to both the Welsh and UK economy. Wrexham County Borough is located within the North East Wales Border and Coast (NEWBC) Spatial Plan Area, with Wrexham Town identified as a key settlement of national importance, a key regeneration area and key business sector area. It is also identified as forming part of the Wrexham-Deeside-Chester hub, where the strengthening of such hubs, as a focus for investment in future employment, housing, retail, leisure and services is a key element of realising the vision for this spatial area.
- 4.3 Among the key elements identified by the Spatial Plan as being required for realising the vision for North East Wales is the following:

Developing sustainable accessibility between hubs, coastal and border towns and rural parts of the Area. Improving accessibility on key road and rail corridors to maintain economic growth and provide development opportunities to the west (Wales Spatial Plan 2008 Update, page 53).

- 4.4 Elsewhere, the Spatial Plan recognises that the western area of Wrexham is a location of employment growth opportunity, and in particular:

There are also opportunities for significant employment growth in health, particularly around major hospitals in Wrexham and Bodelwyddan (Wales Spatial Plan 2008 Update, page 58).

North Wales Regional Employment Land Strategy (2014)

- 4.5 This strategy was commissioned by the North Wales local authorities in 2014, and provides an overarching framework for investment in key employment sites in the region. The strategy gave scores for key employment sites across North Wales using a range of criteria, and the Wrexham Technology Park/Ruthin Road location achieved one of the highest scores of any site in the region.
- 4.6 This led to the site being designated as one of only four Regional Strategic Sites in North Wales, with the following functions.
- Uses limited to high quality office based development
 - Prestige location for high quality employment accommodation to support a range of professional services and life sciences.

- The vision for the site identifies financial services and the technology and innovation sectors to be of particular interest.
- 4.7 However, the strategy acknowledges that highways infrastructure works will be required in order to facilitate further development.

Wrexham Borough Council Local Development Plan

- 4.8 The Council is currently preparing a new Local Development Plan (LDP) to replace the Unitary Development Plan (1996-2011).² With respect to the economy, the vision is that by 2028

"...our economy will be strong and responsive to our gateway location within Wales. Wrexham County Borough will be a sustainable place where everyone feels safe and included. A place that provides for everyone's housing; health and wellbeing needs; and a place that enhances the quality and distinctiveness of our natural, built heritage and cultural assets."

- 4.9 Four key economic development objectives have been identified, as follows:
- **Objective 1:** Ensuring that the role of Wrexham as a key settlement of national importance in the Wales Spatial Plan Wrexham – Deeside – Chester hub is strengthened;
 - **Objective 2:** Support a vibrant, diverse and competitive local economy that provides a range of job opportunities to enable new and existing businesses to grow in Wrexham;
 - **Objective 3** Regenerate Wrexham Town Centre as a multifunctional destination for retail, education, civic, amenity, employment, leisure and residential uses; and
 - **Objective 4:** Promote active travel and use of public transport by locating new development in the most sustainable locations, and seek to alleviate known highway infrastructure capacity constraints on the road network within the County Borough.
- 4.10 Clearly, Objective 4 is most obviously relevant to the matters considered in this report. But it is also the case that the addressing of the accessibility problems affecting the Western Gateway will also directly support the other three economic development objectives that have been developed as part of the LDP.

Employment Land Review (2015)

- 4.11 An Employment Land Review (ELR, February 2015) was undertaken by BE Group as a joint study covering both Wrexham and Flintshire.³ In the case of Wrexham CBC, the report forms part of the evidence base for the emerging Local Development Plan.
- 4.12 The ELR study acknowledges that Wrexham Technology Park is (alongside the town centre) the most important office location in the Wrexham Council area.

² http://www.wrexham.gov.uk/english/planning_portal/plan_policy/local_development_plan_new.htm

³ http://www.wrexham.gov.uk/assets/pdfs/planning/ldp2/march_2015/employment_land_review_exec_summary.pdf

- 4.13 The ELR study also confirms the importance of the Wrexham's Western Gateway as a long term development project. The study highlighted the Council's ambition for the Western Gateway to become a flagship scheme, consisting of a 'green' or 'eco' business park with the focus on sustainability and high environmental credentials. Project aims include the delivery of around 8 ha of new business park space with BREEAM excellent offices.
- 4.14 However, the ELR also recognises the constraints on future development of the Western Gateway area, and in particular the need to provide for an upgraded junction on the A483 in order to unlock remaining site development potential (ELR, page 140 and page 314).

LDP Preferred Strategy Consultation

- 4.15 In February 2016 Wrexham Council launched a consultation on a Preferred Strategy for a Local Development Plan (LDP) covering the period up to 2028.
- 4.16 Overall, the Preferred Strategy proposes the development of 11,715 new homes over the life of the Plan. This level of growth derived from migration-driven trend based projections, using variants of the Welsh Government's population projections.
- 4.17 The delivery of this scale of housing in the area will require a significant increase compared to previous rates of housing development in the Wrexham area. The LDP Preferred Strategy also acknowledges that:

This increase in housing delivery... will mean that greenfield sites on the edge of existing settlement limits will need to be developed to accommodate new growth⁴

- 4.18 Policy SP9 of the Preferred Strategy identifies the opportunity for the development of a Key Strategic Site for a mixed use development at Lower Berse Farm, Ruthin Road. This land, which lies to the south of the Phase III extension of Wrexham Technology Park, is a 75 ha greenfield site that could provide up to 1,260 dwellings as well as a primary school and other associated community facilities.
- 4.19 On this basis, the site at Lower Berse farm if adopted would provide over 10% of the housing development expected to be needed in the Wrexham Council area over the LDP period in order to deliver the scale of housing growth in the area anticipated by Welsh Government population projections.
- 4.20 However, the development of this key development opportunity is considered to be wholly dependent on the upgrading of the nearby junction of the A483 (Junction 4).

Conclusions and Implications

- 4.21 Wrexham is confirmed in the Wales Spatial Plan (2008) as a location for employment, health and education services that is important for North Wales as a whole.

⁴ <http://wrexhamldp.wrexham.gov.uk/portal/ldp/ps/ps2016?pointId=s1453369123810#section-s1453369123810>

- 4.22 Within Wrexham, the Wrexham Technology Park/ Ruthin Road Development Area is acknowledged as providing levels of current employment, as well as significant levels of future employment-yielding development opportunity. Moreover, apart from the scale of opportunity, another important factor is the high quality nature of future jobs expected to be created in this area.
- 4.23 Moreover, the strategic importance of Wrexham Technology Park as a location of future employment opportunity has been confirmed in recent work undertaken by the Mersey Dee Alliance and also by the North Wales Economic Ambition Board, both in partnership with Wrexham CBC.
- 4.24 The importance of the area for employment is fully acknowledged in the emerging Local Development Plan and the supporting evidence base, including the recent Employment Land Review.
- 4.25 Moreover, the Preferred Strategy for the LDP has identified the Lower Berse Farm site (off Ruthin Road) as being a Key Strategic Site which is expected to be a major contributor to Wrexham's future housing land supply, and which will be required in order to deliver the scale of housing growth in the area anticipated by Welsh Government population projections .
- 4.26 However, the realisation of all of these strategic and policy objectives will be dependent on addressing successfully the existing and expected future traffic congestion problems at the A483 junctions.

5: Economic context

- 5.1 This Chapter provides an overview of the current and recent economic performance of Wrexham, focusing in particular on issues that are relevant to the issues concerning the A483 junctions.

Business demography

- 5.2 One of the key issues facing the Wrexham economy is its ability to attract and retain businesses, including indigenous business start-ups. Based on 2010 data, the local economy was positioned on only the 74th percentile of UK local authority areas in terms of business density – i.e. the number of businesses per head of resident population. This indicates that Wrexham outperforms only 26% of UK local authority areas on this measure of competitiveness.
- 5.3 However, there are some signs of improvement, with the population of active businesses increasing by some 8% between 2010 and 2015. Nevertheless, the challenge of attracting and retaining new investment from businesses located outside the area – as well as encouraging new entrepreneurship from among the local population – remains an important challenge for Wrexham.
- 5.4 This underlines the importance of maximising the attractiveness of the area to outside investors, including enhancing the connectivity of Wrexham to national and regional markets.
- 5.5 Another key issue for Wrexham is that a below-average proportion of its businesses are located in the 'knowledge economy' as defined by the OECD.⁵ This feature of the local economy has been acknowledged by the local authority, which has attempted to address this weakness by promoting Wrexham as a location for inward and indigenous investment in technology and related industries. These efforts have included promoting Wrexham Technology Park as an inward investment and local business expansion location. This also underlines the long term importance of addressing accessibility conditions to the Technology Park, including accessibility via Junctions 4 and 5 on the A483 which directly serve the Technology Park

Employment trends

- 5.6 Recent employment growth trends have been very positive for Wrexham. Between 2009 and 2014, the area has increased the size of its employment base by around 1,900 employees, which is equivalent to growth of around 4% over the 2009 baseline (source: BRES data from ONS).
- 5.7 The BRES data from ONS also provides a breakdown of employment change by business sector. The principal sources of job growth for Wrexham between 2009 and 2014 have been as follows:
- Growth of over 1,100 jobs in health sector

⁵ According to the 2010 UK Competitiveness Index, Wrexham was on the 78th percentile of UK local authority areas in terms of knowledge intensity of its business base.

- Growth of nearly 900 jobs in education
 - A net increase of nearly 600 jobs in manufacturing
 - Growth of 400 jobs in information and communications technology and services.
- 5.8 On the other hand, several sectors have experienced significant declines, in particular:
- Nearly 800 jobs have been lost in the wholesale and retail sector
 - Nearly 700 jobs have been lost in public administration and related activities.
- 5.9 The importance of the Western Gateway area as locations for the delivery of regional important health and education services has already been highlighted. Maintaining good quality accessibility conditions for Wrexham Maelor hospital and Glyndwr University in particular will help maintain their value as economic assets as well as important locations for service delivery to the local and regional population and business base.

Labour market participation trends

- 5.10 In terms of labour market activity indicators, Wrexham experiences above-average levels of participation:
- For the resident working age population, and for the 12 months to September 2015, economic activity rates are significantly higher in Wrexham (80.2%) compared to both the GB (77.7%) and Wales (75.1%) average.
 - For the same time period, the employment rate among Wrexham's resident working age population (75.9%) was also higher than the respective GB (73.4%) and Wales (70.3%) averages.

Commuting patterns

- 5.11 Growth in recent employment levels and relatively high rates of employment among the resident population mean that cross-border relationships with nearby centres of population are increasingly important as a source of workers for local employers.
- 5.12 But even at the time of the most recent Census (2011) – which was undertaken at a time prior to most of the recent growth in labour demand – there was evidence of strong relationships with nearby areas as a source of in-commuting workers.
- 5.13 In particular, the 2011 Census revealed that around 27% of workers whose job was located in Wrexham were commuting in from nearby areas for work. The most important sources of in-commuters to Wrexham were as follows:
- Flintshire (8.8% of Wrexham's workers)
 - Cheshire West & Chester (4.4%)
 - Shropshire (4.2%)

- Denbighshire (2.8%)
- 5.14 Many of these in-commuting workers will be travelling into the main employment areas of Wrexham, including those in the Western Gateway area as well as the town centre. (Data on this topic is provided later in this Chapter).
- 5.15 In addition, a significant number of workers who are resident in the Wrexham area to the west of the A483 will be undertaking travel-to-work journeys that require movement through the A483 junctions on their way to work in the town centre, on Wrexham Industrial Estate, etc. A review of small area Census data (from 2011) indicates that around 1,940 workers travel to workplaces located in the Western Gateway area from areas of Wrexham west of the A483 (but south of Junction 6): this area includes some of the most deprived wards in the Wrexham area.

Economic forecasts

- 5.16 So far the focus has been on the interrogation of current and recent ONS datasets of economic indicators. However, it is also important to consider the potential future direction of employment growth, including an assessment of economic forecasts for the local authority area.
- 5.17 An important source of insight is the employment forecasts that have been supplied to Wrexham CBC by Cambridge Econometrics (CE), a well-known independent source of sub-national economic forecasts in the UK. These forecasts were obtained for use in the Joint Employment Land Review report produced in partnership with Flintshire Council in 2015.
- 5.18 Focusing on the Wrexham CBC area only, the most important results produced by the CE forecasts were as follows:
- The overall change in Wrexham's employment base between 2013 and 2030 is expected to be growth of around 4,900 jobs. This anticipated net growth is despite an expected overall decline of 3,300 jobs in the manufacturing sector.
 - Job losses in manufacturing and some other industries (transportation and storage) will be more than offset by gains in service industries, in particular in:
 - Business support services (+1,000 jobs);
 - Education (+1,700 jobs);
 - Health (+2,300 jobs); and
 - Food and accommodation services (+1,900 jobs).
- 5.19 While it should not be expected that all the anticipated jobs gains would occur in the Western Gateway area, it is clear that the area is an important centre of activity for each of these growth sectors. The Western Gateway area also provides a very important opportunity area for additional development of these sectors: this potential is explored and quantified in more detail in a later Chapter of this report.

Characteristics of the Western Gateway area

Importance of the area for employment

- 5.20 The area that is the focus of this study does not fit neatly with ONS ward or output area boundaries. This means that only an approximate estimate can be made – using the ONS annual employment survey (the BRES) – of the levels of employment supported in the Western Gateway area.
- 5.21 Despite this limitation, it is clear that even on conservative assumptions, the Western Gateway area of Wrexham is of great importance as a location for employment in the County Borough.
- 5.22 For example, if the output area Wrexham 011A – which under-bounds the Western Gateway area – is used to provide an estimate, the level of employment in the area was estimated to be just over 6,500 in 2014. This represents about 12% of all jobs found in Wrexham in 2014.
- 5.23 An alternative approximation can be obtained by use of the Brynyffynnon ward boundary. However, Brynyffynnon ward is slightly too large, as it includes an area east of the railway line towards the town centre. The total number of jobs in the Brynyffynnon ward in 2014 was just under 9,900. This represents about 18% of all jobs found in Wrexham in 2014.
- 5.24 A final source of information is the smaller output area information that is gathered at the time of the national Census. This data allows for a much closer approximation of the Western Gateway area boundaries. Based on this information, there were estimated to be about 7,050 people working in the Western Gateway area at the time of the Census (2011).
- 5.25 On this basis, we suggest that the best approximation of the current employment base in the Western Gateway area is between 7,000 and 7,500 jobs (i.e. the 2011 Census baseline plus an allowance for growth occurring between 2011 and 2014, based on trends revealed by the annual BRES surveys).

Structure of Employment

- 5.26 Employment in the Western Gateway area is heavily dominated by health care services, primarily reflecting the location in the area of the Wrexham Maelor hospital. However, there are other significant health sector employers located in the area, including the Spire Yale hospital and the local headquarters of the Welsh Ambulance Services NHS Trust.
- 5.27 According to BRES survey undertaken annually by the ONS, there are between 5,200 and 5,600 health sector jobs located in the Western Gateway area. The lower of these figures is associated with the output area Wrexham 011A (which under-bounds the area) and the higher figure is associated with Brynyffynnon ward (which includes an additional area to the east of the railway line extending to the edge of the town centre).
- 5.28 Other important sectoral contributors to the Western Gateway area's employment base include:
- Retail trade
 - Education

- Business support services.

Commuting patterns

- 5.29 It was suggested earlier in this chapter that the Western Gateway area is an important destination for workers who reside outside the boundaries of Wrexham CBC. For many of these workers, access will be made via the A483.
- 5.30 The 2011 Census provides detailed information on the location of origin of the estimated 7,050 or so people who were working in the area at that time. Of these people:
- about 4,910 (70%) were resident in the Wrexham County Borough area
 - about 830 (12%) lived in Flintshire
 - about 370 (5%) lived in Cheshire West & Chester
 - about 280 (4%) lived in Shropshire
 - about 270 (4%) lived in Denbighshire.
- 5.31 As already indicated, of the 4,910 Wrexham residents working in the area, around 1,940 were resident of communities located west of the A483 (but south of Junction 6, so excluding areas such as Llay).

Conclusions and Implications

- 5.32 Wrexham has a growing employment base but still faces challenges in attracting and growing its local business base. The longer term outlook is positive, but the area is expected to continue to face restructuring challenges, including the replacement of an expected 3,000 manufacturing jobs over the period to 2030.
- 5.33 Forecasts obtained by the Council for use in the Employment Land Review study indicate that a large proportion of future job growth will occur in sectors that are largely centred on the Wrexham Western Gateway area, including jobs in Health, Education, Business Support Services and Accommodation.
- 5.34 On that basis, it will be of vital importance that the Council and its partners work to maximise the attractiveness of the area for business occupiers and workers. In particular, it will be important that the Council and its partners strive to overcome any obstacles or constraints to additional business investment and expansion occurring in the Western Gateway area.
- 5.35 The attitudes of existing occupiers to the competitiveness of the Western Gateway area as a place to do business, grow and expand can provide important insights into matters that may affect their future investment intentions. They can also provide clues as to how the area may be perceived by would-be investors (i.e. businesses not currently located in the area, but who might consider Wrexham – and the Wrexham Gateway location in particular – as a place to re-locate to and do business.
- 5.36 The next stage in the study, therefore, is to report the findings of a bespoke business survey undertaken of employers currently occupying premises in the Western Gateway area.
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6: Survey of Existing Occupiers

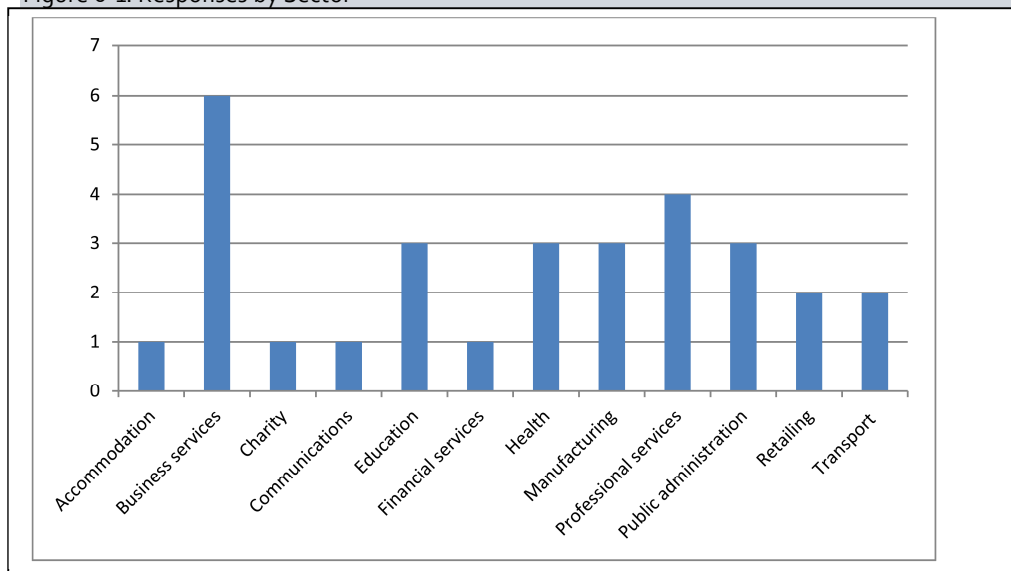
- 6.1 The potential effect of existing levels of traffic congestion on businesses and organisations operating in the Western Gateway area has been assessed through the use of a occupier survey. The questionnaire that was used is appended to this report.
- 6.2 A total of 86 businesses and organisations that occupy premises in the Western Gateway area were contacted by Wrexham CBC's Business Support team and asked if they would like to take part in the survey. A total of 26 survey questionnaires were returned, with responses sent to either the Council's Business Support team or directly to Development Economics.
- 6.3 In addition, a further six businesses/organisations located in the vicinity of Wrexham General railway station were also approached directly by Development Economics, and asked if they would be prepared to take part in the survey. Of these, four agreed to part in the survey.
- 6.4 The overall survey response of over 32% (30 out of a total of 92 employers invited to take part) should be regarded as a very high level of responsiveness to a survey of this type.

Respondent Profile

Sector representation

- 6.5 There was a wide spread of activities among the organisations responding to the survey. The following table summarises the respondents by business sector or activity:

Figure 6-1: Responses by Sector



- 6.6 Business, Professional and Financial services businesses accounted for 11 out of the 30 responses received. It should be noted that of the three manufacturing businesses that responded, two have headquarters functions only located in the Western Gateway area. The single third sector (charitable) organisation that responded was also a headquarters.

Size profile

- 6.7 Turning to the size profile of respondents (in terms of the number of employees at their site located in the Western Gateway area), the following table summarises the distribution.

Table 6-1: Size profile of respondents (employee numbers)

Size of business (located in study area)	No.
Less than 10 employees	11
10-19 employees	5
20-49 employees	5
50-99 employees	3
More than 100 employees	6
Total	30

- 6.8 The overall number of employees accounted for by the survey sample was about 1,940. The average size of the organisations interviewed was 64 employees. The size of the largest single respondent was approximately 450 employees.

Duration of presence in the area

- 6.9 Of the 30 responses received, 29 provided information on the length of time that the business or organisation has occupied premises within the Western Gateway area. The aggregate total of years spent occupying the area was 619 years, with an average duration of just over 25 years.

Markets served from the Western Gateway area location

- 6.10 There was also a question about the proportion of business or other activity that is focused on Wrexham and other parts of North East Wales (as well as other UK locations and international locations). All except two respondents answered this question. Of the 24 that did:
- a total of 7 businesses were 100% focused on local and sub-regional markets (i.e. Wrexham and North East Wales only)
 - a total of 12 businesses were obtaining at least 50% of their revenues from UK markets outside of Wrexham and North East Wales
 - two businesses were largely focused on international markets, with over 70% of their revenues deriving from non-UK customers.

6.11 Across the 24 responses, the average levels of market focus were as follows:

- Wrexham County Borough: 37%
- Other North East Wales: 27%
- Other UK: 27%
- International: 8%.

Business Prospects

6.12 The questionnaire posed a series of questions that asked about current business prospects and challenges.

Employment trend

6.13 In terms of levels of employment at their premises:

- A total of 12 businesses/organisations indicated that they had increased job numbers at their local site over the past 12 months
- 15 businesses/organisations indicated that they had maintained the same level of employment at their local site over the past 12 months
- Three businesses/organisations reported a decrease in the local employment level over the past year.

6.14 Respondents were also given an opportunity to quantify any change in employment levels over the previous 12 month period. Of those that did (9 respondents) the aggregate increase in employees was 178 and the average increase was just under 20 (19.8).

Turnover/Activity trend

6.15 Respondents were also asked if their activity at the site (as measured by sales, turnover or other relevant metric) had changed over the past year. Two respondents (in the public sector) indicated that this question was not relevant to them, but of the others:

- 18 indicated growing levels of activity
- 5 indicated stable levels of activity (i.e. no change)
- 4 indicated decreased levels of activity.

Prospects

- 6.16 Respondents were asked whether they thought that (1) job numbers and (2) sales/turnover/activity would increase, decrease or stay the same at their local site over the next 3-5 years. The table below sets out the responses received:

Table 6-2: Prospects for activity at this site (3-5 years)

	Job numbers	Sales/Turnover
Increase	19	25
Stay the same	8	1
Decrease	0	0
Don't know	3	3
Not relevant	0	1
Total	30	30

- 6.17 Of the 19 businesses that expected job numbers to increase, seven were able to provide a quantified estimate of this increase. The aggregate value of this increase was just over 640 extra jobs.

Business Challenges

- 6.18 Respondents were asked what they considered to be the major issues facing their business over the next 3-5 years. Respondents were given 10 prompts, followed by an opportunity to nominate any other issue that was not included on the list of prompts. The table below sets out the responses received, ranked from the most to least frequently cited responses:

Table 6-3: Prospects for activity at this site (3-5 years)

Issue	Number of responses
Traffic congestion	17
UK economy	12
Operating costs	11
Parking provision	11
Competition	11
Shortage of qualified workers	9
Public transport	8
Technological change	7
Crime	4
Demographic change	4

- 6.19 Traffic congestion was the most frequently cited problem (17 responses), with several other transport related responses (parking provision, 11 responses; and public transport provision, 8 responses) also being commonly cited.

6.20 Respondents could also provide unprompted responses to this question. Among the responses received included the following:

- Two responses indicated that there was an issue concerning broadband speeds in the area
- Two responses (one public sector, one third sector) cited funding constraints as the main issue they were facing
- One response indicated a concern about the availability of suitable commercial office premises in the area

Challenges of accessibility and congestion

Effect on business operations

6.21 Survey respondents were also asked whether (and if so, to what extent) the traffic conditions on the A483 Wrexham Bypass – and specifically the conditions at the Mold Road and Ruthin Road junctions – were affecting their business operations.

6.22 The table below summarises the responses received to this question:

Table 6-4: Effects of A483 junction conditions on business

Effect	Number
No effect	3
Little effect	3
Moderate negative effect	12
Significant negative effect	11
Major negative effect	1
Total	30

6.23 A total of 12 businesses/organisations reported that congestion was having a significant or major negative effect on their operations.

6.24 It is worth noting that the total number of employees found in the businesses/organisations that indicated that congestion was have a significant or major negative effect on their operations was 1,260 jobs (representing 65% of the total employment found among the sample of businesses surveyed). The average employment level in businesses that responded in this way was 105, compared to the overall sample average of 64.

6.25 Next, respondents were asked to what extent the traffic conditions on the A483 Wrexham Bypass – and specifically the conditions at the Mold Road and Ruthin Road junctions – were affecting a number of operational issues, and specifically:

- Staff punctuality/arrival for work
- Staff recruitment and/or retention

- Travel for staff during the working day
- Freight/deliveries arrival times
- Freight/deliveries dispatch times.

6.26 Respondents were asked to rank these effects on a 0-5 basis, with “0” meaning no effect and 5 meaning a major impact.

6.27 The responses to these questions are summarised in the table below.

Effect	Average score
Staff punctuality/arrival at work	2.47
Staff recruitment and/or retention	1.20
Travel for staff during the working day	1.87
Freight/delivery arrival times (including post)	1.33
Freight/delivery dispatch	0.70

6.28 .The principal issues that were reported were:

- (1) staff punctuality/arrival at work (with an average score of 2.47)
- (2) Travel for staff during the working day (1.87).

Recent trend for effects

6.29 Respondents were also asked whether these problems (if they existed) were perceived to be worsening, improving or staying about the same over the past 12 months. The table below summarises these responses:

Effect	Significantly worse	Somewhat worse	About the same	Somewhat better	Significantly better
Staff punctuality etc.	4	11	14	1	0
Staff recruitment/retention	0	2	27	1	0
Travel for staff (during the day)	5	6	18	1	0
Freight/delivery arrival	4	2	24	0	0
Freight/delivery dispatch	3	1	27	0	0

Manifestation of effects

6.30 Survey respondents were also asked in what ways (if any) traffic congestion issues on the A483 Wrexham Bypass were affecting their operations. Respondents were given 7 prompts, followed by an opportunity to nominate any other issue that was not included on the list of prompts.

- 6.31 The table below sets out the responses received, ranked from the most to least frequently cited responses:

Table 6-7: How effects (if any) are manifested	
Effect	Number of responses
Increased costs to the business	6
Decreased revenue for the business	4
Decreased levels of productivity	9
Inability to meet client deadlines	8
Loss of business to competitors	3
Reduced quality of service to customers/clients	12
Increased pressure/stress on other staff	13

- 6.32 Increased pressure/stress on staff was the most frequently cited problem (13 responses), followed by reduced quality of service to customers or clients (12 responses).
- 6.33 Respondents could also provide unprompted responses to this question. Among the responses received included the following:
- Concerns about wasted staff time for staff whose jobs require them to travel to and from the business location during the course of the working day
 - For job respondent whose activity was related to emergency services, there was a concern that congestion is leading to reduced response times for emergency vehicles.

Conclusions and implications

- 6.34 A survey completed by 30 locally based employers located in properties in the Western Gateway area has confirmed that traffic congestion on the A483 junctions on the Wrexham bypass is a significant issue for many.
- 6.35 Of the employers surveyed, 24 (80%) indicated that congestion on the A483 junctions was having a negative effect on their operations.
- 6.36 The main issues experienced by employers reporting negative effects were:
- problems related to staff punctuality and arrival at work; and
 - difficulties caused for staff who need to travel to and from the business location to perform their duties during the course of the working day.
- 6.37 About half of the employers surveyed reported that some of the issues (in particular, staff arrival times) had worsened over the past 12 months.
- 6.38 When asked how these negative effects were impinging on their operations, the most frequent responses were:

- Increased stress/pressure on staff (43%)
- Reduced quality of service to customers/clients (40%)
- Reduced productivity (30%)
- Inability to meet client deadlines (27%).

6.39 It is a matter of concern that a significant proportion of local employers are reporting that traffic congestion is constraining productivity and harming the quality of the service they provide.

6.40 It is also the case that two of the businesses that were interviewed indicated that the deterioration of the situation is causing them to reassess their investment priorities, with the possibility that plans for local expansions either deferred or potentially being abandoned entirely in favour of locations elsewhere.

7: Future Opportunity: Western Gateway

Introduction

7.1 This chapter:

- firstly, sets out in brief terms the assumptions used to estimate the construction phase impacts of future development opportunities in the Western Gateway area;
- secondly, provides the results of this assessment;
- thirdly, sets out the additional assumptions used in the assessment of the potential permanent impacts of employment-yielding developments that could take place in the Western Gateway area; and
- fourthly, provides the results of this assessment.

7.2 It should be noted that we have distinguished between:

- firstly, the current pipeline of developments that we understand have already been permitted and are either already underway or are expected to proceed; and
- secondly, additional developments that are not yet permitted but are understood to be in broad alignment with planning policies in the area, and which are likely to be dependent for approval on improvements being made to respective junction arrangements on the A483.

7.3 Developments of the first type that we have noted (but for which we have not included in our assessment of potential additionality) are as follows:

- the Phase 1 development of a new headquarters for Money Penny on a portion of the Ruthin Road Development Area (Western Gateway);
- the development of a new supermarket for Aldi on a site on Ruthin Road; and
- the development of the former Brother Industries site on land off Croesnewydd Rd for 79 new residential dwellings.

Construction phase impacts

7.4 To understand the potential construction phase impacts that may arise from further additional developments in the Western Gateway area, consultations have been undertaken with officers at Wrexham CBC. In addition, relevant background and contextual material and documents have been reviewed by Development Economics. All calculations and estimates that have been produced are the responsibility of Development Economics.

- 7.5 The approach taken to estimating the potential gross temporary employment impacts associated with anticipated future developments in the Western Gateway area is based on the anticipated levels of capital expenditure needed for the provision of site infrastructure and the subsequent erection of residential dwellings, commercial buildings and community facilities, etc.
- 7.6 However, construction employment associated with the implementation of improvements to the A483 infrastructure itself has been excluded from this assessment.
- 7.7 A list of potential development opportunities in the Western Gateway area that are considered to be dependent on the alleviation of junction constraints is set out in the table below. The table also provides an indication of the potential scale of development for each scheme and for some schemes an indication of the assumed scale of construction investment that would be involved. Note: individual details for some schemes have not been provided for reasons of confidentiality, but the incremental estimated value of these schemes is included in the total in the final row.

Table 7-1: Indicative scheme capital investment expenditures (£ million, 2016 prices)

Site	Potential Use	Assumed Scale	Indicative estimate of potential construction cost (£m)
Moneypenny Phase 2 (remainder of E1.39 Ruthin Rd site)	Offices	8,166 sqm	confidential
Hotel expansion	Hotel	50 beds	confidential
Dynamic@Western Gateway	Special education needs/respice care	2,379 sqm	confidential
Lower Berse Farm – housing	Housing	1,260 dwellings	149.0
Lower Berse Farm – education	School	3 FE	5.5
Lower Berse Farm – other community facilities	Medical facilities	350 sqm	1.7
Armed Forces covenant off Ruthin Rd	Housing	16 flats	confidential
WCBC Housing build @ Western Gateway	Housing	45 dwellings	5.3
Total (all schemes)			186.2

Source: Development Economics

- 7.8 All construction cost estimates have been determined by Development Economics, based on project specific information or (where this is not available) either on examples of similar projects elsewhere or based on current advice on per unit area construction costs (from sources such as Building Cost Information Service). It should also be stressed that the estimates exclude contributions to any off-site infrastructure works that may be required to achieve planning permissions.
- 7.9 As already noted, the assessment also excludes the construction employment that would be associated with the development of the A483 junction improvements themselves.

7.10 Estimates for gross construction phase employment are obtained by use of benchmark aggregate amounts of expenditure in the construction sector required to support overall levels of employment.⁶ Specifically, it is assumed that:

- £183,750 of construction spend on site infrastructure and commercial developments would be required support an average of 1 person-year of construction sector employment; and
- £93,200 of construction expenditure on housing development would be required to support an average of 1 person-year of construction sector employment.

7.11 The difference in the two assumptions is due to the fact that infrastructure and commercial development projects are generally more capital intensive than housing development projects.

7.12 The results of this assessment are set out in the table below. In summary, the estimate is that a total of about 1,850 gross person-years of construction phase employment would be expected to be supported by the anticipated construction expenditure, with:

- nearly 1,670 gross person-years of employment would be supported by the development of housing;
- about 120 person-years employment supported by the development of commercial developments (offices, etc.); and
- nearly 60 person-years employment supported by the building of community infrastructure, including the primary school proposed for the Lower Berse Farm key strategic site.

Table 7-2: Indicative scheme construction phase employment (person-years)

Housing	1,673
Commercial development	109
Community infrastructure (school, medical facilities, etc.)	56
Total	1,838

Source: Development Economics

7.13 This construction-phase employment is expected to occur over a 10-year timeframe. The annual average quantum of construction phase expenditure is therefore expected to amount to about 184 person-years per annum in gross terms over this 10-year period.

7.14 So far the focus has been on the potential for gross employment creation. In order to estimate the potential for net additional construction phase impacts, it is necessary to make adjustments for leakage and displacement, and to account for the potential for multiplier impacts in the local economy. For the purpose of estimating these additionality factors, the 'local economy' is defined by the spatial area of Wrexham County Borough.

⁶ The specific assumptions used here are estimated based on data on average revenues per employee for the UK as a whole for sub-sectors of the construction industry, based on turnover and employee data derived from the Office for National Statistics (including the Business Register and Employment Survey, 2009-2014). Having obtained the relevant data, the next step was to convert these to 2016 prices using the HM Treasury GDP deflator series

7.15 The calculation of net additional construction phase impacts is based on estimating the additionality of the development (i.e. the conversion of gross impact estimates into net impact estimates) covering the following additionality factors:

- **Leakage:** is the proportion of project outcomes that benefit individuals or organisations located beyond the 'intended' area of impact (i.e. Wrexham County Borough). Leakage is generally higher at a local level, although it also varies by the nature of development type. For some specialist types of construction activities leakage rates can be quite high, as a specialist workforce may be required for certain aspects of work. However, none of the proposed buildings or infrastructure on the wider Western Gateway area is considered to be of this type.
- **Displacement:** is an estimate of the economic activity hosted by the site that would be diverted from other businesses in the local (Wrexham County Borough) area. This again varies by the nature of development type. For construction activities displacement rates are usually considered to be quite low, because of the temporary, 'one-off' nature of the activities.
- **Multipliers:** composite employment multipliers measure the employment benefits created through the indirect and induced effects of subsequent rounds of direct expenditure in the local (Wrexham County Borough) economy. Values for multipliers vary according to the size and complexity of the economy under consideration, and are generally lower at a more localised level.

7.16 There is a fourth additionality concept – deadweight – but in this case it is assumed that there would be no additional construction activity on any of these sites if the required junction improvements do not take place. Therefore there is no construction phase deadweight to consider.

7.17 Estimates of leakage, displacement and multiplier effects have been applied at a project level based on an assessment of the likely effects for each development and based on respected guidance published by the Homes and Communities Agency.⁷ The specific assumptions for each of the relevant additionality factors applied to each development type are set out in detail in table below.

Table 7-3: Additionality Assumptions (at the spatial level of Wrexham County Borough)

Leakage	27.1%
Displacement – construction	30.0%
Multipliers – construction	0.21

Source: *Development Economics*

7.18 Note: the estimate for leakage is based on the proportion of jobs in Wrexham County Borough that are estimated to be filled by non-residents (which is 27.1%, based on the most up-to-date data available from the ONS, which derives from the 2011 Census). The other assumptions are based on standard assumptions set out in the HCA Additionality Guide.

7.19 Based on the application of assumptions as set above for leakage, displacement and multipliers, the expected employment impacts associated with the scheme are presented in the table below.

⁷ English Partnerships (now HCA): *Additionality Guide, Third Edition*, October 2010

Table 7-4: Expected Net Additional Construction Phase Employment (person-years) - Wrexham

Element of scheme	Gross Jobs	Displacement	Leakage	Multiplier effects	Net person-years including multiplier effects
Housing	1,673	502	317	179	1,033
Commercial development	109	33	21	12	67
Community infrastructure	56	17	11	6	35
Total	1,838	551	349	197	1,135

- 7.20 On this basis, although the construction and development phase is expected to support about 1,838 gross persons years of employment, when displacement (551) and leakage (349) are accounted for, the overall total reduces to around 938 person-years. However, consideration of about 197 person-years' worth of extra local employment through the workings of multiplier effects would increase the total to around 1,135 person-years. These jobs would be supported over an assumed 10 year construction phase.
- 7.21 As previously noted, this assessment excludes the construction employment that would be associated with the development of the proposed A483 junction improvements.

Permanent employment impacts

- 7.22 The commercial development and community facilities (i.e. a primary school and local medical services) that were introduced in the previous section also have the ability to support permanent employment.
- 7.23 The following table sets out the assumed scale of development associated with these commercial and community elements.

Table 7-5: Assumed scale of employment yielding floorspace/development

Category	Floorspace (sqm GIA)	Floorspace (sqm NIA)
Offices	8,170	7,350
Hotel	50 rooms	50 rooms
Special education	2,380	2,020
School	n/a	n/a
Medical	350	300

- 7.24 Additional assumptions need to be introduced at this stage regarding the likely employment density of each type of employment-yielding floorspace introduced in the previous section. The source of assumptions regarding office and hotel space is guidance published by the Homes and Communities Agency (HCA) and OffPat in 2010.⁸

⁸ *Employment Densities Guide*, 2nd Edition, 2010, page 6

Table 7-6: Employment density assumptions for employment yielding floorspace/development

Category	Area per Full time Equivalent (sq m)	Floor Area Basis
Offices	12	Net Internal Area
Hotel	1.25 jobs/room	n/a

Source: Based on HCA Employment Densities Guide, 2nd Edition, 2010

- 7.25 Densities for other types of development are based on experience elsewhere with similar elements of other development schemes located elsewhere.
- 7.26 Based on the assumptions in the table above and our experience from elsewhere, the table below presents the expected overall totals for full time equivalent employment associated with the development of the wider Western Gateway area (excluding existing pipeline schemes such as Moneypenny Phase 1).

Table 7-7: Estimated Gross Full time Equivalent Employment - Wrexham

Category	Gross Jobs (FTE)
Offices	500
Hotel	40
School + Special education	66
Medical	9
Total	615

- 7.27 Hence, overall gross employment is expected to total 615 full time equivalent jobs by the time that the development is completed and occupied in full.
- 7.28 As was the case with the assessment of net additional construction phase impacts, estimates for leakage, displacement and multiplier effects need to be applied to each element of the permanent phase of development and occupancy in order to establish estimates for net additional permanent effects. The additionality assumptions estimates for the employment yielding elements are based on guidance published by the Homes and Communities Agency.⁹ The specific assumptions for each of the relevant additionality factors applied to each development type are set out in detail in table below.

Table 7-8: Additionality Assumptions (at the spatial level of Wrexham CBC area)

Leakage	27.1%
Displacement – offices (Moneypenny)	10%
Displacement – other offices	50%
Displacement – hotel	25%
Displacement – primary school	10%
Displacement – special education	0%
Displacement – medical facilities	20%
Multipliers – all offices, medical, education	0.36
Multipliers – hotel	0.47

⁹ English Partnerships (now HCA): *Additionality Guide, Third Edition*, October 2010

- 7.29 Given these assumptions, the table below summarises the estimated net additional permanent employment impacts associated with the development of the wider Western Gateway area (excluding existing pipeline schemes such as Moneypenny Phase 1).

Table 7-9: Estimated Net Additional Permanent Employment Effects (FTEs) - Wrexham

Element of scheme	Gross Jobs	Displacement	Leakage	Multiplier effects	Net jobs including multiplier effects
Offices	500	50	122	118	446
Hotel	40	10	8	10	32
School + special education	66	5	13	12	46
Medical	9	2	2	2	7
Total	615	66	145	142	531

- 7.30 In summary, it is estimated that the currently constrained developments at the Western gateway of Wrexham could deliver 615 gross permanent FTE jobs if the development opportunities are realised in full and occupied to their potential. However, once displacement and leakage are accounted for net impact would be reduced to 389 permanent FTE jobs. However, the addition of an estimated 201 extra local jobs through the workings of multiplier effects would result in a net additional employment impact of 531 FTE jobs.

Gross Value Added

- 7.31 The estimates of permanent overall net additional employment set out above allow for the estimation of expected permanent levels of additional workplace-based economic output associated with the proposed development of the wider Western Gateway area (but excluding existing pipeline schemes such as Moneypenny Phase 1).
- 7.32 This estimation is based on regional workplace-based GVA per employee data for Wales drawn from datasets published by the ONS. The most recent data that is available was released in July 2015 and provides data for 2013.
- 7.33 As shown in the table below, the data suggest that once built and fully occupied, the proposed development of the wider Western Gateway area (but excluding existing pipeline schemes) has the potential to generate just over £50 million per annum in net additional workplace-based GVA for the Wrexham County Borough economy (2013 prices) once the scheme is fully occupied. This estimate is based on the level of net additional permanent employment expected to be facilitated by junction improvements on the A483.
- 7.34 Of this, £38.6 million is expected to arise from the direct effects, with a further £11.6 million accounted for by indirect and induced (multiplier) effects.

Table 7-10: Expected annual GVA impacts, £millions (2013 prices), Wrexham

Element of scheme	Aggregate GVA (£m)
Offices	35.9
Hotel	1.7
School + special education	0.3
Medical	0.7
Other (multipliers)	11.6
Total	50.2

Impacts on the Wales Economy

- 7.35 So far, the assessment of impacts has focused on those expected to be generated at the spatial level of the Wrexham CBC area. A final step is to summarise the expected additionality of the junction improvements at the spatial level of the Welsh economy as a whole. This mainly requires different assumptions to be made regarding the additionality factors (displacement, leakage and multipliers) that were introduced earlier. The specific assumptions used are set out in the table below.

Table 7-11 Additionality Assumptions (at the spatial level of Wales)

Leakage	14.2%
Displacement – construction	50%
Displacement – offices	50%
Displacement – hotel	50%
Displacement – primary school	50%
Displacement – special education	50%
Displacement – medical facilities	50%
Multipliers – construction	0.30
Multipliers – all offices, medical, education	0.38
Multipliers – hotel	0.44

- 7.36 Assumptions regarding leakage are based on Census data. The assumptions with respect to displacement and multipliers are in line with guidance found in the HCA Additionality Guide (2010).

Net additional construction sector jobs: Wales

- 7.37 Based on the application of assumptions as set above for leakage, displacement and multipliers, the expected employment impacts associated with the scheme at the spatial level of Wales are presented in the table below.

Table 7-12 Expected Net Additional Construction Phase Employment (person-years): Wales

Element of scheme	Gross Jobs	Displacement	Leakage	Multiplier effects	Net person-years including multiplier effects
Housing	1,673	836	119	215	933
Commercial development	109	54	8	14	61
Community infrastructure	56	28	4	7	31
Total	1,838	919	131	237	1,025

- 7.38 On this basis, although the construction and development phase is expected to support about 1,838 gross persons years of employment, when displacement (919) and leakage (131) are accounted for, at the spatial level of Wales the overall total reduces to around 788 person-years. However, consideration of 237 person-years' worth of extra local employment through the workings of multiplier effects would increase the total to 1,025 person-years. These jobs would be supported over an assumed 10 year construction phase.

Net additional permanent jobs: Wales

- 7.39 Based on the application of assumptions as set above for leakage, displacement and multipliers, the expected permanent employment impacts associated with the scheme for Wales are presented in the table below.

Table 7-13: Expected Net Additional Permanent Phase Employment (person-years): Wales

Element of scheme	Gross Jobs	Displacement	Leakage	Multiplier effects	Net person-years including multiplier effects
Offices	500	250	34	82	296
Hotel	40	20	3	8	25
School + special education	66	33	5	11	39
Medical	9	5	1	1	5
Total	615	308	44	101	365

- 7.40 It is estimated that the currently constrained remaining development potential at the Western Gateway of Wrexham could deliver 615 gross permanent FTE jobs if the development opportunities are realised in full and occupied to their potential. However – at the spatial level of Wales – once displacement and leakage are accounted for net impact would be reduced to 264 permanent FTE jobs. However, the addition of an estimated 101 extra jobs across Wales through the workings of multiplier effects would result in a net additional employment impact of 365 FTE jobs.

Net additional GVA: Wales

- 7.41 A final element to consider at the spatial level of Wales is the additional contribution to economic output (GVA) associated with the proposed development of the wider Western Gateway area (but excluding existing pipeline schemes).
- 7.42 Based on the same approach as used for estimation for Wrexham CBC (set out above), the results of the assessment are set out in the table below.
- 7.43 Our analysis indicates that – once built and fully occupied – the proposed development of the wider Western Gateway area (but excluding existing pipeline schemes) has the potential to generate £33.9 million per annum in net additional workplace-based GVA for the Wales economy (2013 prices).
- 7.44 Of this, £25.7 million is expected to arise from the direct effects, with a further £8.3 million accounted for by indirect and induced (multiplier) effects.

Table 7-14: Expected annual GVA impacts, £millions (2013 prices), Wales

Element of scheme	Aggregate GVA (£m)
Offices	23.5
Hotel	1.4
School + special education	0.2
Medical	0.6
Other (multipliers)	8.3
Total	33.9

8: Summary and Conclusions

- 8.1 Development Economics Limited was appointed by Wrexham County Borough Council in December 2015 to identify and quantify as far as possible the potential effects on the local economy of delivering improvements to junctions serving the A483 trunk road as it passes through Wrexham. In particular, the study was to consider the potential effects on existing businesses and future development opportunities of congestion on the Mold Rd (A541) and Ruthin Rd (A525) junctions.

The nature of the congestion problem

- 8.2 It is widely acknowledged that some of the junctions with the A483(T) suffer from periods of congestion, most notably the A525 Ruthin Rd and A541 Mold Rd junctions. Whilst this delay is generally confined to the AM and PM peaks, there is evidence that increasing levels of congestion in this area is creating challenges for businesses and other employers located in the vicinity.
- 8.3 Another key consideration is that the area that is served by the increasingly congested junctions is also the location for a number of important commercial and residential development opportunities that are of strategic importance to the future of Wrexham and the wider North East Wales economy.
- 8.4 To better understand the extent of the problem, and also to understand the potential extent to which things may change as a result of forecast development, Wrexham CBC appointed Capita in 2015 to undertake an assessment of the strategic road network in and around the main settlement of Wrexham town centre, with particular reference to the A483 and its junctions between Junction 3 (A5152) and Junction 6 (A5156).
- 8.5 The assessment work undertaken by Capita has confirmed that the junctions are experiencing increasing capacity problems. Capita have identified high level interventions which, if deliverable, could afford the necessary capacity improvements required to accommodate forecast growth.
- 8.6 These proposed interventions involve significant capital investment in new highway infrastructure. The most significant of these interventions is a new grade separated gyratory at Junction 4, but Capita have also identified the need to upgrade existing merge and diverge lanes at Junction 4 through to 6, effectively resulting in the need for additional lane capacity between these junctions (i.e. widening the A483 from two lanes to three lanes).
- 8.7 Capita have undertaken a high level assessment of the costs of providing the necessary junction infrastructure capacity improvements but this excludes any cost allowances for service diversions, land purchase, ground conditions or trunk road working conditions. There has at this stage been no cost estimates developed for the identified need to upgrade existing merge and diverges and widening of the A483 from junction 4 through to 6. It is noted in the Capita report that there are numerous constraints that will impact on the delivery of these improvements specifically the requirement for the widening of the A483 including a number of over/under bridges and the requirement for third party land.

Planning and Strategy Context

- 8.8 Wrexham is confirmed in the Wales Spatial Plan (2008) as a principal location for employment, health and education services that is important for North Wales as a whole.
- 8.9 Within Wrexham, the Wrexham Technology Park/ Ruthin Road Development Area is acknowledged as providing high levels of current employment, as well as significant levels of future employment-yielding development opportunity. Another important factor is the fact that a high proportion of future job opportunities expected to be created in this area are high quality (knowledge intensive) in nature.
- 8.10 The importance of the Western Gateway area for employment and its role in helping to develop a knowledge economy locally is acknowledged in the emerging Local Development Plan and the supporting evidence base, including the recent Employment Land Review. The strategic importance of Wrexham Technology Park as a location of future employment opportunity has also been confirmed in recent work undertaken by the Mersey Dee Alliance and also by the North Wales Economic Ambition Board, both in partnership with Wrexham CBC.
- 8.11 Furthermore, the Preferred Strategy for the LDP has identified the Lower Berse Farm site off Ruthin Road as being a Key Strategic Site which is expected to be a major contributor to Wrexham's future housing land supply.¹⁰ Moreover, the delivery of this site would be expected to contribute around 10% of the overall volume of housing development identified by the LDP is being required over the period of the Plan (11,715 new homes). The housing target identified by the LDP is itself based on variants of Welsh Government population projections for the Wrexham area.

Local Economic Challenges

- 8.12 Wrexham has a growing employment base but still faces challenges in attracting and growing its local business base. The longer term outlook is positive, but the area is expected to continue to face restructuring challenges, including the replacement of an expected 3,000 manufacturing jobs over the period to 2030.
- 8.13 Forecasts obtained by the Council for use in the Employment Land Review study¹¹ indicate that a large proportion of future job growth will occur in sectors that are largely centred on the Western Gateway area, including jobs in Health, Education, Business Support Services and Accommodation services.
- 8.14 On that basis, it will be of vital importance that the Council and its partners work to maximise the attractiveness of the Western Gateway area for business occupiers and workers. In particular, it will be important that the Council and its partners strive to overcome any obstacles or constraints to additional business investment and expansion occurring in the Western Gateway area.

¹⁰ http://www.wrexham.gov.uk/english/planning_portal/plan_policy/local_development_plan_new.htm

¹¹ http://www.wrexham.gov.uk/assets/pdfs/planning/ldp2/march_2015/employment_land_review_exec_summary.pdf

Effects on local employers

- 8.15 A survey completed by 30 locally based employers located in properties in the Western area has confirmed that traffic congestion on the A483 junctions on the Wrexham bypass is a significant issue for many.
- 8.16 Of the employers surveyed, 24 (80%) indicated that congestion on the A483 junctions was having a negative effect on their operations.
- 8.17 The main issues experienced by employers reporting negative effects were:
- problems related to staff punctuality and arrival at work; and
 - difficulties caused for staff who need to travel to and from the business location to perform their duties during the course of the working day.
- 8.18 About half of the employers surveyed reported that some of the issues (in particular, staff arrival times) had worsened over the past 12 months.
- 8.19 When asked how these negative effects were impinging on their operations, the most frequent responses were:
- Increased stress/pressure on staff (43%)
 - Reduced quality of service to customers/clients (40%)
 - Reduced productivity (30%)
 - Inability to meet client deadlines (27%).
- 8.20 It is a matter of concern that a significant proportion of local employers are reporting that traffic congestion is constraining productivity and harming the quality of the service they provide.
- 8.21 It is also the case that two of the businesses that were interviewed indicated that the deterioration of the situation is causing them to reassess their investment priorities, with the possibility that plans for local expansions either deferred or potentially being abandoned entirely in favour of locations elsewhere.

Constraints on future investment

- 8.22 Notwithstanding the potential change in sentiment that may be occurring among some occupiers, it is clear that the Western Gateway area is a key potential location for future commercial and residential development in Wrexham.
- 8.23 In terms of construction phase impacts, the potential pipeline of schemes that could be released were current traffic congestion problems to be overcome could amount to very significant levels of construction investment and construction phase employment.
- 8.24 Having reviewed this potential pipeline of residential and commercial development schemes (but ignoring those that are already underway or which have received planning permission):

- the schemes stand to deliver an additional £186 million (2016 prices) of construction expenditure investment (but excluding expenditure on land costs and off site infrastructure); and
 - the schemes are also potentially capable of supporting nearly 1,840 person years of gross construction employment, which would also translate to 1,135 of net local (Wrexham) employment once additionality factors (leakage, displacement, etc.) are taken into account.
- 8.25 The potential future development schemes that are capable of yielding future permanent employment are estimated to be capable of hosting 615 gross jobs once they are built and fully occupied as currently envisaged.
- 8.26 When additionality factors are taken into account, these gross jobs are expected to translate to:
- 531 net additional jobs at the spatial level of Wrexham County Borough
 - 365 net additional jobs at the spatial level of Wales as a whole.
- 8.27 In terms of additional economic output, when additionality factors are taken into account, the net additional economic output is estimated to be worth:
- £50.2 million per annum (2013 prices) in additional GVA at the spatial level of Wrexham County Borough
 - £33.9 million per annum (2013 prices) in additional GVA at the spatial level of Wales as a whole.
- 8.28 However, must be emphasised that the realisation of all of these additional employment and economic output growth opportunities will be dependent on addressing successfully the existing and expected future traffic congestion problems at the A483 junctions.