

THE CASE FOR CHANGE



An extensive evidence baseline was prepared which has underpinned the development of the Economic Strategy and supported the process of establishing the case for change in the borough.

The evidence base was wide ranging and structured around the three Pillars of **Place, People and Business & Economy**. It has informed our understanding of what the key opportunities and challenges are within the borough and across its towns and neighbourhoods.



Drawing upon the key information and evidence from the baseline, this section of the strategy provides a high-level summary of:

1. The borough's 'Strengths, Weaknesses, Opportunities and Threats' (SWOT)

2. The borough's key strategic opportunities


3. Key issues/ Barriers to overcome under the three Pillars of Place, People, and Business & Economy


This analysis is underpinned by a comprehensive evidence base report.


HIGH-LEVEL SWOT ANALYSIS


The following summarises the five defining strengths, weaknesses, opportunities, and threats shaping economic growth and prosperity in the borough.


FIVE DEFINING STRENGTHS

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• **Strong road and public transport links make Bury a well-connected and accessible place to live, work and visit.** The borough's access to the M60, M66, A56 corridor and tram links within Greater Manchester offers strong connectivity to this economic powerhouse. This could be further enhanced by continued investment in public transport, improving active travel infrastructure, and encouraging people to switch to more sustainable modes of transport, helping reduce fossil fuel-based emissions and accelerating decarbonisation efforts in the borough.
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• **Diverse and growing business base.** Over the last ten years, the borough's business base has grown by 49% which exceeds both the national and regional averages. Supporting these businesses to survive, scale up and grow within the borough will facilitate local jobs and productivity growth. Bury has sector specialisms in high productivity sectors such as manufacturing to be nurtured, and foundation sectors such as health and social care which can help to meet the needs of the current and future population of the borough.
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• **Highly skilled occupations.** Compared to the national and regional averages, the borough has a higher proportion of residents working in highly skilled occupations (49%). This typically supports better paid and less precarious employment opportunities, supporting social mobility and life chances for residents. Retaining resident spend locally will support community wealth building.
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• **Strong technical education offer.** The alignment of apprenticeship starts to important sectors provides a level of responsiveness to meeting current and future skill needs and is equipping residents with relevant skills to gain employment in the borough.
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• **High quality of life,** with a diverse range of well-connected towns and villages, and a strong recreation and leisure offer including parks and open spaces. The provision of sites for new housing creates an opportunity to lever the borough's quality of life offer to retain and attract population.

FIVE DEFINING WEAKNESSES

- **Significant COVID-19 Economic Impacts.** The borough's economy (measured by GVA) contracted by 6% as a result of COVID-19 impacts (2019-2020)), but is now recovering back to 2019 pre-covid levels. Prior to Covid-19 growth had been low, with employment only experiencing a 6% growth rate since 2015 compared to 13% in Greater Manchester. Weaker economic performance has direct implications for the prosperity of the borough and living standards of its residents.
- **Low job density resulting in high outflow commuter rates.** With a job density of 0.7 jobs per adult resident, a large proportion of residents commute out of the borough for work. This means the borough is not able to fully benefit from the talent and spend opportunities presented by these out-commuting residents.
- **Employment is concentrated in lower value sectors.** With specialisms in sectors such as health, retail and construction, the borough has a reliance on sectors which are typically lower value and are vulnerable to disruptors such as automation, EU exit and macro-economic shocks.
- **Large parts of the borough fall within the most deprived areas of England.** The borough consistently scores poorly across the indicators for deprivation which further entrenches low social mobility and limited life chances of its residents. Unemployment has risen during the pandemic and is most severe in areas of high deprivation.
- **Bury has one of the lowest proportions of residents aged 16+ earning above the national living wage in Greater Manchester.** This has a negative effect on the living standards of residents and reduces opportunity for residents to reinvest in the local economy through greater disposable income.



FIVE DEFINING OPPORTUNITIES



- **The Northern Gateway/Atom Valley** is a site of strategic importance in Greater Manchester. It will help tackle the borough's current undersupply of commercial floorspace and support job growth. By maximising the potential of this site and unlocking its employment opportunities, this presents a chance for Bury to grow its economy and key high value sectors, such as advanced manufacturing.



- **Increasing job density and retaining talent.** The construction and operation of major projects would harness the talent of the local workforce and provide opportunities to upskill and train residents who have struggled to enter or stay in the labour market. With a large number of highly skilled residents, these opportunities could also improve Bury's ability to retain those people who currently migrate out of the borough for employment.



- **Forecast growth in high value sectors.** Forecast growth in sectors such as professional, scientific and technical employment will support the provision of high value local jobs. A focus on growing and supporting key sectors such as advanced manufacturing, low carbon and creative and digital will further support productivity growth in the borough.



- **The regeneration of town centres is crucial to improving the attractiveness of the borough as a place to live, work and visit.** Planned major investment provides an opportunity to work with local institutions and organisations to maximise the benefit to support community wealth building. Creating vibrant town centres with a range of uses will help support post-Covid recovery. This includes the provision of flexible workspaces and a housing offer which responds to hybrid working trends.



- **Bury's quality of life offer.** If the borough is to thrive and grow then it will need to leverage assets that support life satisfaction and well-being. This includes improving health outcomes by working with local partners to reduce economic inactivity, tapping into its key assets such as proximity to greenspace, and providing a range of housing opportunities to encourage people to live in the borough.

FIVE DEFINING THREATS

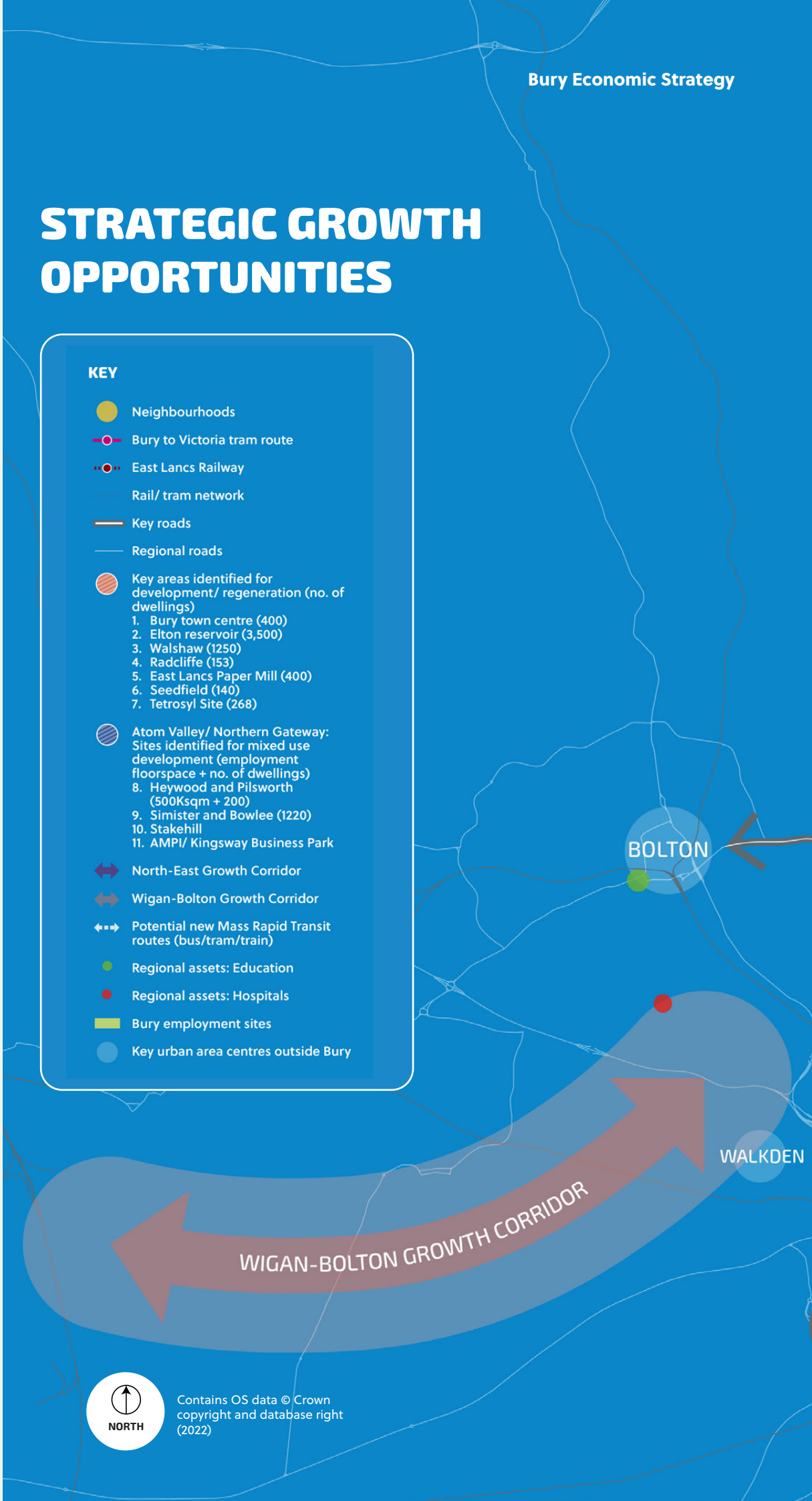
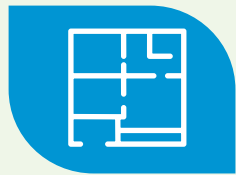
- **Bury's ageing population is compounded by a slow increase in its working age population.** The borough has seen a 15% increase in its 65+ population over the last decade (2012-21), while its working age population has only grown by 1.5% compared to 3.9% in GM and 3.6% nationally. These population challenges are forecast to continue, with growth concentrated in the 65+ cohort. This will contribute to a shrinking pool of labour to fuel our economic growth.
- **Skill shortage vacancies are a barrier to business growth and productivity.** With 9% of employers reporting a skill shortage vacancy (relative to 6% in GM).
- **Enterprise and scaling up.** The borough experienced a negative business birth rate in 2020, which contrasts with the positive position experienced elsewhere. The provision of supporting infrastructure including employment sites and affordable/flexible workspace meeting a range of end-uses to support business start-up and growth is part of a supportive business environment.
- **Inequality becomes more entrenched in Bury.** Areas which face the greatest deprivation are also more likely to have faced either no change or a decrease in their employment and business count in the last 5 years. As the borough pursues major opportunities for economic growth, it will need to ensure that these opportunities are inclusive to local residents and businesses.
- **Poor digital 'cold spots' could hinder business competitiveness and undermine digital inclusion.** Slow download speeds and access to ultra fast broadband below the GM average, future businesses may choose to locate elsewhere. This threatens the borough's competitiveness and could deter investment.



STRATEGIC GROWTH OPPORTUNITIES

KEY

-  Neighbourhoods
-  Bury to Victoria tram route
-  East Lancs Railway
-  Rail/ tram network
-  Key roads
-  Regional roads
-  Key areas identified for development/ regeneration (no. of dwellings)
 1. Bury town centre (400)
 2. Elton reservoir (3,500)
 3. Walshaw (1250)
 4. Radcliffe (153)
 5. East Lancs Paper Mill (400)
 6. Seedfield (140)
 7. Tetrosyl Site (268)
-  Atom Valley/ Northern Gateway: Sites identified for mixed use development (employment floorspace + no. of dwellings)
 8. Heywood and Pilsworth (500Ksqm + 200)
 9. Simister and Bowlee (1220)
 10. Stakehill
 11. AMPI/ Kingsway Business Park
-  North-East Growth Corridor
-  Wigan-Bolton Growth Corridor
-  Potential new Mass Rapid Transit routes (bus/tram/train)
-  Regional assets: Education
-  Regional assets: Hospitals
-  Bury employment sites
-  Key urban area centres outside Bury



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RAMSBOTTOM

TOTTINGTON

BURY
TOWN CENTRE

ROCHDALE

RADCLIFFE

WHITEFIELD

NORTH-EAST GROWTH CORRIDOR

MIDDLETON

OLDHAM

PRESTWICH

MANCHESTER &
SALFORD

KEY ISSUES- BARRIERS TO OVERCOME

Our Place: Where Are We Now?

Key Issues

Constrained Supply of Employment Land

- For many years, the borough has suffered from an inadequate and constrained supply of employment land, in terms of both quantity and quality, which has constrained the borough's ability to retain and attract investment.
- Only 12 sites are currently available – 9.52 hectares. 8 are small-scale sites of less than 0.4 hectares in size.
- Land at Chamberhall (Phase 2) accounts for 40% (3.9 hectares) of available land and will be developed in the near future now a development partner has been secured.
- The borough has the lowest existing baseline supply in Greater Manchester's Places for Everyone (PfE) nine districts for industrial or warehousing development. (10, 231 sqm or 0.54% of PfE supply).

Housing Affordability

- A combination of natural population growth and net internal migration from other parts of Greater Manchester and England have created significant housing demand and affordability challenges in the borough.
- House prices have risen by 57% over the last decade (50% nationally). Acute pressures in Prestwich and suburbs around Radcliffe (100% rises in the last 5 years).
- Based on PfE between 2022 and 2039, the borough needs to create an additional 7,678 homes, equivalent to building 452 homes per year. The borough does not have enough land within the urban area or brownfield sites to accommodate its housing target

Need for Revitalised Towns

- The borough is made up of six distinct and unique towns each with their own economic opportunities and scope for growth and development.
- Maximising the success of our towns will ensure the whole borough is able to perform to its highest potential. Our focus on town centre regeneration and revitalisation needs to continue following our work in setting out regeneration masterplans and strategic frameworks in Bury, Radcliffe and Prestwich.
- Diversification of uses and less reliance on retail will be key, alongside tackling issues of footfall, public realm and road and transport accessibility.



Key Issues

Supporting Leisure, Culture and Tourism

- The leisure, culture, and tourism sectors contribute to local economies through visitor spend, create a vibrant and interesting place to live and help create a positive image of Bury as a culturally vibrant place.
- Supporting the leisure, cultural and tourism economy will contribute to the revitalisation of the borough and provide much needed economic diversification in the borough's town centres and beyond.

Ageing and Inadequate Infrastructure

- The borough has some relative strengths when it comes to infrastructure – Metrolink, road links (M66/M60). However, the borough's socio-economic challenges are exacerbated by gaps in other good quality and reliable infrastructure.
 - For example, demand for Metrolink services outstrips supply at peak times, bus services across Bury (e.g. east-west) do not meet local needs, while active travel infrastructure needs significant improvement.
 - Improvements required in the scale and speed of Bury's digital infrastructure to meet business and resident demands.
 - The borough's digital infrastructure challenge is most acute in the north of the borough with lower than average download speeds.
 - Ensuring all large developments are well served by appropriate infrastructure is key, with a focus on low carbon and local energy generation.
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KEY ISSUES- BARRIERS TO OVERCOME

Our People: Where Are We Now?

Key Issues

An Ageing Population

- The borough has a diverse demography with a younger population located around its town centres and an older demographic concentrated in the more rural parts in the north of the borough.
- An ageing population is already presenting challenges for the borough by restricting the supply of labour in the working age population and increasing demand for health and social care services.
- This challenge is anticipated to escalate into the next decade and without proactive policymaking to support this ageing population and encourage larger numbers of working age adults to move into the borough any future economic opportunities will be seriously compromised.

Significant Health Inequalities

- As the borough's population continues to age, further challenges around health and wellbeing are expected to increase. Some of the most significant health challenges are likely to be faced by residents who are already in some of the most deprived parts of the borough.
- While life expectancy across the borough averages at 78 for men and 82 for women, below national rates of 79 and 83 for men and women respectively, there are major disparities across the borough. For example, Radcliffe's average life expectancy for men is ten years lower than the borough average.
- Such significant health inequalities mean disparate health needs across the borough and lead to significant consequences for our labour force and health and social care services.

Deprivation & Social Mobility Challenges

- While there are pockets of relatively low deprivation across the borough there are large parts of the borough that are within the top 20% most deprived areas in England.
- Deprivation in the borough is most acutely concentrated around the town centres of Bury, Radcliffe, Whitefield and Prestwich while there are smaller pockets of deprivation in the north of the borough
- Over a fifth of the borough's neighbourhoods are in the 20% most deprived places in England for crime and a fifth of neighbourhoods being in the 20% most deprived places for income deprivation.



Key Issues

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- The borough needs to improve levels of social mobility. On the Social Mobility Index, compared with all 324 English local authorities the borough ranks 213th
- The borough has particular social mobility challenges amongst the 'early years' category, ranking as the least socially mobile local authority in the country.

Aligning Skills Supply & Demand

- The borough's connections to Greater Manchester are a significant asset and provide job opportunities for residents, with these roles tending to be oriented around higher level skills. For the borough's residents to access and benefit from these jobs there is a need to invest in higher level skills to support them
- 43% of adults in the borough hold level 4+ qualifications (GM 39%). This rate is in line with the England level of 43% however lags behind other GM boroughs of Trafford (55%), Manchester (45%) and Stockport (47%). The borough must invest in the skills base of its workforce to ensure it can maintain and further develop a competitive skills supply offer in the Greater Manchester city region.

Low Jobs Density

- The borough has a relatively low job density level of 0.7 jobs per working age adult compared to 0.86 across Greater Manchester and an average of 0.86 nationally.
 - Over 74,000 residents leave the borough for work. This contributes to a self-containment rate (the proportion of residents living and working in their place of residence) of 44%. This means that nearly two-thirds (66%) of residents leave the borough for work (mostly to other parts of GM, Lancashire).
 - While outflow commuting is not inherently a challenge, it does imply a lower degree of opportunity within the borough and therefore a reliance on surrounding areas for employment and prosperity.
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KEY ISSUES- BARRIERS TO OVERCOME

Our Economy & Businesses: Where are we now?

Key Issues

GVA and Covid-19 Impacts

- The borough's economy was estimated to be worth around £3.5bn in 2019, the equivalent of around 5% of the wider Greater Manchester economy. The economy contracted by 6% between 2019 and 2020. As a result, the borough's economy was worth around £3.4bn in 2020.
 - The borough's economy has been recovering more recently, with GVA rising back to slightly above pre-pandemic levels to around £3.6bn, equivalent to 5% of Greater Manchester's economy. Geographically, the borough's townships, particularly Bury, represent hotspots of economic activity and GVA.
 - COVID-19 impacted the economy in a wide variety of ways, with some sectors experiencing significant rates of contractions. For example, the food and accommodation service sector lost 63% of its value between 2019 and 2020. This sector has not yet recovered to pre-covid levels with only a 34% increase seen in 2021

Small Businesses exposed to economic shocks

- The borough's businesses are predominantly in the micro businesses category, often self-employed businesses. Over 90% of the businesses in the borough employ fewer than 9 people.
- The borough has a higher-than-average business density rate of 68 businesses per 1,000 working age adults (GM business density of 59 businesses per 1,000 working age adults), highlighting the borough's entrepreneurial activity.
- However, it also indicates that the business base in the borough is typically made up of some of the most vulnerable types of businesses that may be highly exposed to economic shocks. The pandemic and high energy costs crises have highlighted this issue most recently.



Key Issues

A Reliance on Public Sector Jobs

- The borough has a significant amount of employment in the healthcare and education sectors, these sectors – while fundamental foundational sectors of the economy – are predominantly oriented around public sector employment.
- While not inherently a negative aspect of the borough's labour market composition this reliance on the public sector with over 25% of workers employed in the public sector – compared to just 22% across the wider North West region – may open the borough up to potential future risks.
- The possibility of further budgetary cuts could impact local employment in the borough and lead to significant losses in prosperity and opportunity for many residents.

Preparing for the Future Economy

- In addition to an overdependence on public sector employment, there is a broad range of employment in the borough that is oriented around supporting the Foundational economy, including roles which can be lower skilled (e.g. retail, care sector).
 - While these roles provide crucial services for the wider economy of the borough, they are roles that are most at risk of automation and therefore redundancy. These are also roles that will tend to provide less economic opportunity for those in them.
 - The borough must consider how best to transition people in the economy away from lower skilled roles to ensure future job security. In the future, attracting and retaining higher skilled roles, for example in the advanced manufacturing sector, will allow for greater economic opportunity and enhanced life chances for residents of the borough
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