



**MANCHESTER CITY COUNCIL
INDEPENDENT RETAILERS STUDY:
LEVENSHULME**

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1. INTRODUCTION

- 1.1 GVA Grimley was instructed in January 2009 by Manchester City Council to undertake an Independent Retailers Study for Levenshulme District Centre. This study draws and extends upon the Quantitative Need Study undertaken by GVA Grimley for the City Council back in 2005 with the purpose of examining the role of multiple and independent retailers within Levenshulme and providing an up-to-date picture of current and future retail capacity in the centre. This study should be seen alongside the GVA Grimley Baseline Study for Levenshulme (District Centre Plan) which was commissioned by Manchester City Council in April 2008 to guide the future economic and physical development, investment and regeneration of the district centre and the surrounding neighbourhood.
- 1.2 This study also examines a range of planning measures in order to support the independent sector in Levenshulme going forward through the LDF period.
- 1.3 The study will inform the evidence base for the Council's Local Development Framework, and this information will also be at the Council's disposal to assist in the determination of any future planning applications.
- 1.4 Our terms of reference are to update the quantitative capacity analysis previously undertaken for the Council to provide:
- a detailed up-to-date audit of the vitality and viability of Levenshulme;
 - an up-to-date and realistic assessment of the quantitative and qualitative scope for new retail and other development within Levenshulme, and views on the appropriateness of alternative types of retail development including other multiple convenience/comparison retailers and the role of the independent sector;
 - guidance on the appropriate scale and form of new development, and a review of the alternative development opportunities, in order to inform the City Council's strategies for the centre and to guide the determination of any future development proposals in Levenshulme.
 - understanding of smaller retailers' contribution to the wider economy;
 - solutions to how the Independent sector can be supported in the future, and proposals for how the City Council and partners can help create the right conditions to help support diversity in centres with a strong independent sector presence; and
 - the extent to which the current retail provision in the centre satisfies the level and nature of consumer demand within Levenshulme's catchment area.

- 1.5 In order to produce a comprehensive up-to-date review of retailing needs in Levenshulme we have drawn on a household telephone survey, an in-centre survey and a survey of businesses in Levenshulme. The quantitative capacity exercise draws on the household telephone survey results to establish the current performance of Levenshulme District Centre in terms of convenience and comparison goods floorspace; which informs the forecasts of the future retail floorspace capacity. The results of the full analysis are drawn together to provide a set of recommendations and advice to feed into the Local Development Framework. We also draw on our district centre health check, which sets out the range, choice and distribution of the existing retail provision and highlights any apparent deficiencies.

Structure

- 1.6 The next section of this report sets out our review of national, strategic and local planning policies relevant to retail planning in Manchester City and Levenshulme District Centre. Section 3 highlights current retail trends, focusing on the likely implications for retailing within the city's district centres.
- 1.7 In Section 4 we present our qualitative assessment of Levenshulme District Centre which draws on customer and business views and behaviour as identified from the telephone and business surveys. In Section 5 we present our quantitative assessment and the potential for new retail development in Levenshulme. In Section 6 we review the findings of our study and consider the strategic options for the future development of Levenshulme in terms of retail strategy.

2. POLICY FRAMEWORK

2.1 In this section we examine key features of national, regional and local planning policy guidance.

National Policy Context

2.2 Government guidance makes it clear that sustainable development is the core principle underpinning planning. Accordingly PPS1 sets out a range of overarching policies aimed at facilitating sustainable patterns of urban and rural development through a number of initiatives, including the need to ensure that new developments provide good access to jobs and key services for all members of the community.

2.3 PPS6 reaffirms the Government's commitment to protecting/sustaining town centres. Accordingly the central objective of the guidance is to promote the vitality and viability of town centres by planning for the growth of existing centres and enhancing existing centres by promoting them as the focus for new development.

2.4 PPS6 sets out a number of key objectives which need to be taken into account in the context of the key objectives outlined above, which are as follows:

- enhancing consumer choice by making provision for a range of shopping, leisure and local services which allow genuine choice to meet the needs of the entire community, and particularly socially excluded groups;
- supporting efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity; and
- improving accessibility, ensuring that existing or new development is, or will be, accessible and well-served by a choice of means of transport.

2.5 The guidance also makes it clear that other wider Government policy objectives remain relevant, including the promotion of social inclusion, regeneration of deprived areas, promoting economic growth; sustainable patterns of development, transport choices and high quality and inclusive design.

2.6 In allocating sites and assessing proposed development, PPS6 requires local planning authorities to:

- assess the need for the development;
- identify the appropriate scale;
- apply the sequential approach;
- assess the impact on existing centres, and
- ensure locations are accessible and well served by a choice of means of transport.

- 2.7 In the context of development control, applicants are required to demonstrate conformity with the key tests outlined above. However, 'need' must only be demonstrated for an application for a main town centre use at an edge-of-centre or out-of-centre location, and is not in accordance with an up-to-date development plan document or strategy. Furthermore, impact assessments should be undertaken on a similar basis. Impact assessments are required for all retail and leisure proposals over 2,500 sq m gross, although they may be necessary for smaller developments, such as those likely to have a significant impact on smaller centres. Where significant development in a centre, not in accordance with the development plan strategy, would substantially increase the attraction of the centre and could have an impact on other centres, the impact on other centres will also need to be assessed.
- 2.8 In 2007 the Planning White Paper, 'Planning for a Sustainable Future' announced the current approach in PPS6 to assessing the impact of proposals outside town centres would be reviewed. It announced that the need and impact tests would be replaced with a new test which has a strong focus on the Government's town centre first policy, and which promotes competition and improves consumer choice, avoiding the unintended effects of the current need test.
- 2.9 In July 2008 Proposed Changes to Planning Policy Statement 6: Planning for Town Centres was published for consultation. These sought to refine the policy approach rather than make significant policy changes and proposed to strengthen the Government's policy on positive planning for town centres. With regards to policy formulation, Local authorities would still be expected to assess the need for new town centre development and to take account of scale, impact, accessibility and the sequential approach in selecting sites for development plans.
- 2.10 Following this, the consultation paper on the new PPS4 was published in May 2009 accompanied by good practice guidance prepared by GVA Grimley. In its final form the PPS will replace *PPS4: Industrial, commercial development and small firms*; *PPS5: Simplified Planning Zones*; and *PPS6: Planning for Town Centres*.
- 2.11 The stated intentions of the proposed PPS4 are to support town centre investment, and to ensure that planning promotes competition and consumer choice and does not unduly or disproportionately constrain the market. The proposed changes include reinforcing the other government objectives identified in PPS6, to highlight the need to promote competition between retailers and enable consumer choice, by raising productivity growth rate in the UK and by supporting efficient, competitive and innovative retail sectors with improving productivity and taking measures to conserve and, where appropriate, enhance the established character and diversity of town centres. The increased focus on productivity is consistent with the findings of the Barker review and the Government's wider policy objective to promote sustainable economic growth.
- 2.12 Plan Making Policies set out the required evidence base at the regional and local level. Policy EC1.4 highlights criteria for local planning authorities (LPAs) to consider in assessing the need for retail and leisure development including the need to take account of quantitative need for additional floorspace as well as any qualitative considerations. In terms of assessing the need for office floorspace at the local level, Policy EC5.2 highlights

that this will need to be informed by an assessment at the regional level and the physical capacity for centres to accommodate new development giving consideration to the role of centres in the hierarchy.

- 2.13 The thrust of the local planning approach to town centres (Policy EC5) is in many respects similar to the current PPS6 guidance although there is greater encouragement for flexible town centre polices which are able to respond to changing economic circumstances. Policy continues to reinforce the principle that development should be accessible by a range of transport modes, that it should promote greater choice and retail diversity, and that it should encourage job creation in disadvantaged areas. Policy EC6 encourages LPAs to proactively plan for consumer choice and to promote competitive town centre environments by supporting the diversification of uses; planning for a strong retail mix that meets the requirements of the local catchment area; whilst also recognising the role that smaller shops play in enhancing the character and vibrancy of a centre.
- 2.14 In terms of assessing planning applications for development, it removes the needs test, and where need is a relevant factor, it highlights the importance of qualitative as well as quantitative considerations (Policy EC18-20). While the draft PPS proposes to retain the sequential approach as a key element of National Policy Guidance, it also retains the need for flexibility and recognises the role for alternative business models. Specifically, in seeking to demonstrate flexibility, developers and operators should consider the scale of their development, the format of their development, car parking provision and the scope for disaggregation.
- 2.15 The draft PPS widens the current impact test in its scope to include consideration of 'town centre' impacts, e.g. impact on town centre trade/turnover and effects on vitality and viability; as well as a range of other, wider impacts set out in Policy EC20. The guidance also acknowledges that these can be positive and negative and it is for the local planning authority to seek an overall judgement, focusing in particular on the first five years after implementation of a proposal. 'Wider' impacts include the impact of allocated sites outside town centres being developed in accordance with the development plan, impact on deprived areas and social inclusion objectives, impact on local employment; and impact on economic and physical regeneration in the area.
- 2.16 Further points of relevance to this study are:
- The need to take a more proactive approach to accommodating town centre uses in central locations including, where appropriate, the promotion of the expansion of town centres; and, conversely a realistic approach to the management of decline where justified;
 - The need to establish a hierarchy of centres in each region and sub-region, with any change in the role and function of centres to be secured as part of the preparation of regional spatial strategies (RSSs) and through the preparation of development plans, rather than through individual applications;
 - The need to assemble town centre and edge-of-centre sites for larger stores where need is identified, and to promote higher density, mixed-use multi-storey development;
 - The need to encourage a wider range of services and land uses for centres in decline;

- The need to avoid over-concentration of growth in the highest level centres, and for regional spatial strategies to make clear strategic choices as to where growth is to be encouraged and decline managed;
- The need to assess the quantitative need for additional floorspace for retail, leisure and office uses over the plan period and for five year periods within it, and the capacity of existing centres to accommodate additional development (in the case of long-term strategic policy guidance, a longer term forecasting horizon is required);
- The need to improve public transport linkages to existing out-of-centre facilities, but not as a justification for their extension;
- The need for development plans to set out the roles of different centres and explain how each centre will contribute to the local authority's overall vision for its area;
- The need for development plans to encourage a diversification of uses in the town centre as a whole and to promote positive management of the evening economy, perhaps identifying distinct quarters where the evening economy is to be concentrated;
- The need for development plans to include policies which guide the appropriate scale of development to be encouraged, setting upper limits for the scale of developments that will be allowed in different types of centres;
- The need for plans to positively allocate sufficient sites within and at the edge of town centres so as to meet anticipated demand for the next five years, anticipating the use of CPO powers where needed; and
- The need to promote a more balanced network of centres by strengthening local centres through preparation of local strategies to remedy deficiencies in the local shopping provision.

Regional Policy Context

North West of England Plan – Regional Spatial Strategy to 2021 (September 2008)

- 2.17 The Regional Spatial Strategy for the North West of England was adopted in September 2008, replacing the existing Regional Planning Guidance (RPG 13).
- 2.18 The Strategy describes Manchester as the North West's largest sub-regional economy, with the Manchester City Region representing the greatest potential for boosting economic performance in both the North West and the North of England as a whole. Manchester's strategic position is identified as lying at the intersection of two international transport routes. The Strategy identifies potential for Manchester to close the gap that exists with Southern England. However, the Strategy also describes the Manchester City Region as having problems with marked social and economic inequality.

- 2.19 Policy W5 addresses retail development within the region. It identifies the connection between retail and wider regeneration and, as such, seeks to promote retail investment where it assists in economic growth in the region's town and city centres. It states that schemes should be consistent with the scale and function of the centre and should not undermine the vitality and viability of any other centre or result in the creation of unsustainable shopping patterns.
- 2.20 Additionally, the policy identifies Manchester/Salford and Liverpool City Centres as the North West's primary retail centres and seeks to preserve their status as such. The policy lists a number of centres in which comparison retailing facilities should be encouraged and enhanced in order to ensure a sustainable distribution of high quality retail facilities. However, the policy also allows for investment of an appropriate scale to take place in centres that do not appear in this list. Policy W5 also supports the principle of retail development that facilitates entrepreneurship, particularly increasing the number of independent retailers.
- 2.21 Finally, the policy states that new out-of-centre regional or sub-regional comparison retailing facilities are to be discouraged. This places the onus on local authorities to be pro-active in identifying and creating opportunities for development within town centres. The policy also seeks to discourage large-scale extensions to such facilities (2,500 sq m or more) unless they are in line with the sequential approach as established in PPS6 and maintained in the new PPS4. This means that it is unlikely that the expansion of the Trafford Centre (recognised as an important retail facility in the North West) will be encouraged.
- 2.22 Manchester City Region policy MCR1 supports interventions such as encouraging investment and sustainable development in Regional Centres, surrounding, inner areas and towns and cities and accessible suburban locations. It views these as necessary steps in order to achieve a significant improvement in the sub-region's economic performance.

Local Policy Context

Unitary Development Plan

- 2.23 The Manchester City Council Unitary Development Plan (UDP) was formally adopted in July 1995, and sets out the local planning authority's policies and proposals for development within the city. The Plan was adopted prior to the publication of PPG6 in 1996, and therefore fails to take full account of the provisions of the guidance which have subsequently been updated in PPS6. There have been a number of revisions and alterations since it was first adopted, the most recent being the expiry of a number of policies, under Paragraph 1 (3) of Schedule 8 to the Planning and Compulsory Purchase Act 2004 in September 2007.
- 2.24 The UDP establishes the Council's desire to see Manchester City Centre continue as the regional shopping centre which it sees as part and parcel of the wider regional function that Manchester performs. Policy S1.1 pledges that the Council will work in partnership with the private sector to improve the city centre environment for shoppers and pedestrians, so that it is clean, safe, attractive and accessible to all.

2.25 Policy S1.2 seeks to enhance existing shopping provision, especially in the city centre and in the district centres. The policy lists the district centres – however, these have changed since the UDP was first adopted. Key changes are the replacement of Beswick by Sports City and Moss Side with Hulme. The district centres are now:

Cheetham Hill	Fallowfield	Harpurhey	Newton Heath	Rusholme	Wythenshawe
Chorlton	Gorton	Levenshulme	Northenden	Sport City	
Didsbury	Hulme	Longsight	Openshaw	Withington	

2.26 The main objective of this policy is to protect the district centres as major social and economic assets so that they may continue to benefit from investment and renewal. The policy seeks to direct investment geared towards improving safety, enhancing environmental quality, tackling traffic problems and increasing economic viability in the centres of Cheetham, Sport City, Gorton, Harpurhey, Levenshulme, Longsight, Newton Heath, Openshaw and Wythenshawe. The UDP recognises that the economic vitality of the district centres varies widely and there is an obvious need to target particular areas where the current provision is poor or inadequate.

2.27 Policy S1.3 establishes the Council's objective to enhance the city's market trading areas in order to enhance existing shopping provision, especially in the city centre and in the district centres. The Council recognises that the city's publicly and privately owned market trading areas provide a valuable service to local people.

2.28 Policy S2.1 sets out the Council's objective to ensure that all parts of the city are well provided for in terms of good quality local and convenience shopping facilities within easy reach of people's homes. As such, new shops that meet local needs will be encouraged.

2.29 Policy S2.2 sets out the Council's considerations in assessing proposals for large out of centre stores (2,500 sqm of gross floorspace or more). These include ensuring that development: will not undermine the vitality or viability of the city centre or a nearby district centre or town centre; will not undermine the viability or vitality of nearby local shopping centres which cater for day-to-day needs which are not so easily met by larger stores; is accessible to a wide cross-section of people including disabled people and non-car users and that will not give rise to unacceptable environmental or traffic problems.

2.30 Policy S2.3 permits the limited expansion of retail parks at Queen's Road, Levenshulme and Central Retail Park (Gt. Ancoats Street). It also seeks to enhance accessibility for disabled people to both of these parks and, in the case of Central Retail Park, states that the Council will aim to secure improvements in car-parking facilities. These measures are intended to help ensure the provision of a full range of shopping facilities for all people in the city.

2.31 Residential amenities are protected by Policy S2.4 which states that new shopping facilities should not significantly affect them, particularly through increased traffic congestion, noise and pollution from cars.

- 2.32 Design considerations are taken into account in Policy S2.5 which seeks to ensure that shopping facilities are of a high standard of design with adequate parking provision and which provide a safe and attractive environment for all shoppers.
- 2.33 Finally, Policy S2.6 states that the Council will ensure that all major shopping developments provide a range of facilities and benefits for the comfort and convenience of shoppers including access for disabled people.
- 2.34 The UDP also gives policy direction for specific parts of the city, which it divides into 17 areas. Area 12 comprises Longsight and Levenshulme which combine to form an area described as containing predominantly residential areas linked by an important radial route, Stockport (the A6). Area 12 is described as densely populated, some parts suffer from neglect while other parts remain attractive and popular places to live. The two district centres are less than a mile apart and according to the UDP the area is well provided for in terms of shopping.
- 2.35 Policy LL14 states that *'the Council will permit new developments and the improvement of shopping and related services on Stockport Road within Levenshulme District Centre do long as they do not cause disamenity to residents of adjoining areas resulting from noise, litter and car parking'*. This policy was devised to ensure that the function of this important centre continues to meet the needs, and is not disruptive of local residents.

Refining Options for the Core Strategy (April 2009)

- 2.36 The Core Strategy Issues and Options was consulted on from December 2007 until February 2008 and the responses were analysed. The Council has now published a Core Strategy Refining Options Consultation document which should be read in conjunction with a set of background Issues Papers, one of which (Centres) is summarised here. Consultation on these documents ended on 29th May 2009. The Council anticipates that the following consultation on the Draft Core Strategy will be informal and is currently scheduled for November 2009. Publication of the Core Strategy is scheduled for July 2010 with submission to the Secretary of State scheduled for November 2010. It is anticipated that the document will be examined in March 2011 and adopted in September 2011.
- 2.37 The Core Strategy initially gives an overview of Manchester's key characteristics – demographically, physically, economically and environmentally. It divides the city into five regeneration areas that, along with the city centre, cover the entire Manchester City Council area. The following areas are of relevance: the City Centre Regeneration Area and the South Manchester regeneration area which contains Levenshulme District Centre.
- 2.38 The City Centre Regeneration Area is defined as the area inside the Inner Relief Route and extends beyond this to encompass the Oxford Road Corridor to the southern margin. The city centre has undergone significant change since the publication of the UDP. Residential development has increased with the effect of increasing the population to nearly 19,000. There has also been marked economic growth. This is exemplified by Spinningfields accommodating 20,000 jobs. The Core Strategy states that the city centre will remain the largest

driver of employment growth in the North West and, as such, is a focus for retail, leisure, evening economy, visitor destinations, cultural and arts facilities and regionally significant office development. The Core Strategy identifies the need to create more effective transport connections between the city centre and Manchester's more disadvantaged residents.

- 2.39 The South Manchester regeneration area runs from Whalley Range, Fallowfield and Levenshulme in the north to the Mersey Valley and the M60 Motorway in the south. It encompasses five district centres, of which Levenshulme is one. South Manchester is a largely residential area – over one third of Manchester's population live there. The Core Strategy states that the five district centres are focal points of neighbourhood activity and are home to 'niche' markets and independent retailers; Levenshulme is particularly mentioned as accommodating many antique shops. South Manchester is home to a significant number of students and young professionals and has diverse communities of varying ages and from various ethnic backgrounds and cultures.
- 2.40 The Core Strategy identifies a number of Strategic Objectives. Strategic Objective 4 seeks to provide a network of high quality centres providing a minimum of essential services and local access to food. It states that developments providing additional services and retail will be encouraged in the major district/urban centres. Particular emphasis will be given to development in all centres that help to create distinctive local character.
- 2.41 The Core Strategy seeks to ensure that the scale of new development in existing centres should reflect the role and function of the centre within the retail hierarchy, promote competition and not adversely effect diversity of provision in that centre and neighbouring centres. Additionally, it states that opportunities should be taken to support the continued vitality and viability of the centre and support the role of Independent businesses.
- 2.42 Strategic Objective 5 seeks to improve the physical connectivity of the City to enhance its functioning and competitiveness and provide access to jobs, education, services, retail, green infrastructure, leisure and recreation.

Core Strategy Refining Options Consultation – Centres Issues Paper (April 2009)

- 2.43 The Centres Issues Paper was produced in conjunction with the Core Strategy Refining Options Consultation document. It provides additional detail on responses to the Core Strategy Issues and Options consultation in connection with Manchester's designated centres.
- 2.44 A majority of respondents (90%) stated that district centres should provide residents with core goods and services to support a sustainable centre. Additionally, respondents wanted a range of independent shops, cafes and pubs protected from 'unfair competition/monopolies'. They also wanted a limit on retail floorspace in retail outlets in order to help protect existing shops and small independent businesses.
- 2.45 A distinction is made between centres such as Hulme and Sports City which are anchored by modern convenience retail facilities and Chorlton and Didsbury which are described as more traditional with a broader

range of retailers and services. Levenshulme is described as having a number of discount outlets and a significant amount of comparison retailing, the centre is viewed as complementing and functioning in tandem with Longsight to provide a good retail composition overall, providing choice and diversity, as Longsight is a kilometre away and provides the main food retail and market function.

South Manchester Strategic Regeneration Framework (2008)

2.46 The South Manchester Strategic Regeneration Framework, which covers Levenshulme District Centre, sets out the Council's key priorities and activities in order to guide public and private investment in the area over the next ten to fifteen years. The regeneration area is home to one of the most successful neighbourhoods within the city, but there are also areas of deprivation. According to the SRF, the five busy district centres of Chorlton, Didsbury, Fallowfield, Withington and Levenshulme are well located on key corridors and each has an important role to play in South Manchester, acting as focal points for neighbourhood activity. The neighbourhoods of Levenshulme and Withington are described as being focussed around their respective district centres and have developed around traditional settlements that have become conservation areas.

2.47 The SRF states that not all the district centres provide a rounded retail offer to fulfil their function, "*this is particularly true of Levenshulme and Withington*". Levenshulme, along with Chorlton, is described as a large district centre with over 250 units (compared with a centre average of 100 units within Manchester). Most shoppers use Levenshulme for food provision relying on discount retail. The main issues that need to be addressed in Levenshulme, according to the SRF include the following:

- The size of the centre, Levenshulme is long and there are a number of vacant units throughout the centre;
- Centre needs to be strengthened with a focus on the central stretch to create a stronger core retail offer;
- The absence of a supermarket is a key issue, the vacant foodstore, open and underutilised sites may provide an opportunity;
- The strong independent retail offer is seen as a positive attribute of the district centre that should be built upon;
- Poor civic and community provision;
- Quality of environment and townscape is in need of investment;
- Centre is traffic dominated with pedestrian/traffic conflict, the goal for the medium term should be a safe pedestrian environment;

Summary

- The key objectives of New Draft PPS4 are to support town centre investment and in line with existing PPS6 promote competition between retailers and enable consumer choice. It also encourages councils to recognise the role that smaller shops play in enhancing the character and vibrancy of a centre.
- The adopted North West RSS supports the expansion of centres and stipulates that any investment made should be consistent with the scale and function of the relevant centre, and should not undermine the vitality of any other centres or result in the creation of unsustainable shopping patterns. It also supports the principle of retail development that facilitates entrepreneurship, particularly increasing the number of independent retailers.
- The UDP aims to enhance existing shopping provision in the city centre and in the district centres such as Levenshulme. The Core Strategy Issues and Options paper seeks to provide a network of high quality centres providing a minimum of essential services and local access to food which will, in turn, encourage development which provides additional services and retail which will support the continued vitality and viability of the centres.

3. NATIONAL RETAIL TRENDS

- 3.1 To put this latest assessment of need into context, it is relevant to consider the wider economic and social trends that are likely to influence retailing across the Manchester area in the future. A number of trends are likely to have a bearing on the future pattern of retail provision in the sub region, and the opportunities arising from development proposals.
- 3.2 This section examines key trends and drivers for change in the retail industry since the 2005 Study was undertaken. We outline the key national trends in retailing and service provision of particular relevance to Manchester and Levenshulme from a range of published data sources, including research by Verdict Analysis, Mintel and the New Economics Foundation.

Demographics

- 3.3 Over the last 15 years the UK population has increased at a rate of approximately 0.4% pa, whilst the number of households has increased by 0.5% pa, as average household size has decreased to 2.34 in 2006, with smaller families, more divorces, people living longer etc. The population is also ageing. These trends are forecast to continue and will affect spending habits, how much we spend, on what and where.
- 3.4 Over the next 20 years the 65 and over age group is expected to grow by 4.5m or 47% and the under 65s age group by only 8%. Older shoppers have a younger mindset than in the past, are more fashion aware and financially better-off as a result of general house price growth as well as income growth (but post retirement income from pensions could be a concern if they do not achieve anticipated values). They will have more time to shop, will spend more on DIY and gardening and will expect good customer service. Clearly, the economic slowdown will impact upon disposable income and pension pots with more cautious spending patterns in the immediate future.
- 3.5 Younger shoppers will have higher education fees to pay, will experience higher housing costs, will be more computer literate and spend more money on-line, and will spend more on entertainment/leisure so they may have less to spend in retail shops.

Income & Expenditure

- 3.6 Incomes and expenditure have shown strong growth over the last 20 years, with retail expenditure growing faster than incomes. Overall, retail expenditure has increased by about 3.9% pa in real terms over the last 20 years, with most of this growth on comparison goods rather than convenience goods, where growth has been less than 1% pa. Comparison goods growth has been close to 5.3% pa over the last 30 years, over 6% pa over the last 20 years and even stronger over the last 10 years. These strong trends are not expected to continue in

the foreseeable future due to current high levels of consumer debt, an already low savings ratio and a weaker housing market.

- 3.7 The recent credit crunch has had massive impacts on the retail sector. It is estimated that 1.4 million homeowners will need to re-mortgage over the next year. A study by the insurance company AXA found that three in four families with an income of more than £30,000 were planning to curb spending this year as household budgets become increasingly stretched.
- 3.8 According to Verdict, as customers become more concerned about the economic outlook, they are becoming more selective in their purchasing habits. With rising living costs, disposable incomes are being squeezed, and as a result customers are shopping around more to find the best possible value. Increasingly retailers are finding it harder to please customers, and across all sectors, retailers are converting fewer customers into main users and shoppers are less loyal to their main stores. Such circumstances will have implications on retail capacity forecasting, particularly over the short term, and this is discussed in more detail in Section 5.
- 3.9 It is recognised that the UK economy is now firmly in the grips of a recession. The deterioration has been rapid with the fourth quarter of 2008 seeing a year-on-year decline of 1.5% - one of the sharpest contractions in economic growth since the early 1980s. Although 2009 will bring a sharp contraction in activity, we do not believe that the pain will ease quickly. Indeed, we are forecasting that the economy will continue to shrink throughout 2009 with Verdict forecasting that it will not be until the final quarter of 2010 that we will see positive year on year GDP growth.
- 3.10 Moving beyond 2010, economic growth is predicted to return to positive territory but will be sluggish for a number of years as consumers, the private and public sectors all continue to pay down debt. Since we undertook the Qualitative Retail Study for the City (2006), there have been significant changes to forecast levels of growth. Experian and MapInfo, the main economic retail forecasters have published significantly reduced growth rates in available expenditure which consequently reduces identified capacity for additional floorspace. Notably, Experian report as follows:

“The detailed consumer spending forecasts used in the October document [Experian Retail Planner Briefing Note 2008] were based on figures available before the eruption of the major financial crisis in September, the collapse of consumer and business confidence and the sharp decline in the global economy.

Since that forecast, there have been dramatic changes in the UK's performance. The new forecast incorporates the substantial decline in GDP in the second half of 2008; the sharp increase in unemployment in recent months; gloomy survey evidence that has emerged in 2009; fiscal measures adopted in an attempt to shore up the economy and the steep decline in Bank rate in the past few months.”

Experian Business Strategies, February 2009

- 3.11 The growth projections used in forecasting capacity should therefore respond to advice in respect of the use of trend line (historic) growth rates and forecast growth rates based on consumer expectations. Due to the retail expenditure boom in the latter half of the 1990s and the first half of the 2000s and the major economic recession which is now underway, there are significant differences between these two approaches.
- 3.12 On this basis, we are advised to use economic forecasts prepared by MapInfo/Oxford Economic Forecasting and Experian Business Strategies which take into consideration current and future economic instability. Evidently, the growth rates being used for retail capacity forecasting have changed as a consequence, and have considerable implications on the levels of floorspace that can be accommodated in the short-medium term, i.e. up to 2016.

Sales Efficiency Increases

- 3.13 Although hard quantitative evidence is limited, comparison businesses in particular have, over time, increased sales efficiency by achieving improvements in productivity in the use of floorspace. PPS6 (paragraph 2.34) requires that quantitative need/capacity assessments have regard to a realistic assessment of such improvement. Analysis of past data is difficult as over the last 20 years sales efficiency increases have been affected by changes in the use of retail floorspace, with higher value space-efficient electrical goods replacing lower value space intensive goods, the growth in out-of-centre retailing, a number of one-off events like Sunday Trading and longer opening hours, and the very strong growth of retail expenditure relative to the growth in floorspace.
- 3.14 The future growth in sales densities will undoubtedly be affected by the way in which retail space evolves and is used in the future. At the current time, as a consequence of the credit crunch, sales efficiency growth is unlikely to reach more than 0.5% for convenience shopping from 2012 and 2.0% for comparison shopping beyond 2016. This is reflected within our retail capacity forecasts set out in section 5.

Employment

- 3.15 Over the last 20 years retail expenditure has increased at about 4% pa, but retail employment has increased much more slowly. Total employees in retail employment have increased from 2.2 million to 3.0 million, an increase of 1.5% pa. However, this growth has been in part time employees. Full time equivalent (FTE) employment has hardly increased at all, from about 2.1 million to 2.2 million, a 0.4% pa increase. Over the next 15 years Experian Business Strategies expect a marginal increase in FTE employment in the retail sector with a slightly higher increase in part time employment. Evidently, this needs to be monitored in the forthcoming years based on the slow down in the economy and corresponding growing levels of unemployment with significant consequences for available retail expenditure and retail sector employment positions.

Location

- 3.16 Strong income and expenditure growth has affected retailing in another important way – the rise in car ownership and mobility. In 1961 only 30% of households had a car (one or more cars) and only 2% had more than one car. With public transport (and walking and cycling) the dominant mode of transport, shopping choices were limited and distances travelled were short. By 1970 car ownership had increased significantly so that nearly 50% of households had one or more cars and the number of households with two or more cars had quadrupled but was still under 10%.
- 3.17 Currently about 77% of households have one or more cars and a third of households have two or more cars, a huge increase in mobility over the last 30-40 years. Households are now much more mobile than they were and therefore their choices of where to shop and the distances they can travel are much greater. These trends will continue but the rate of change may well diminish, particularly in light of the economic slow-down. It would seem likely, however, that levels of mobility will be retained although frequency of travel may decline as the number of cars per household may fall in the economic downturn.
- 3.18 Increased mobility and affluence has favoured larger centres over smaller centres. As a result larger centres have increased in size and importance relative to smaller centres which has further reinforced the attraction of larger centres to more mobile shoppers. Smaller centres have, therefore, lost market share and have seen much less new development than the overall rate of expenditure growth would imply. This is recognised by PPS6, which urges local authorities to be pro-active in trying to encourage development in smaller centres.
- 3.19 Increased mobility and affluence has also stimulated out-of-centre development, which has grown much more rapidly than town centre development. Over the last 20 years the majority of retail development has been in edge or out-of-centre locations. This has led to increasingly restrictive planning policy in favour of town centres over the last ten years, but only recently has the growth in out-of-centre development started to slow. This slow down is expected to continue, but Verdict still expect sales at out-of-centre locations to increase at a faster rate than at in-centre locations. They consider that out of town retailing, if provided effectively with improvements to the mix of retailers and facilities on offer, could emerge from the current downturn a more desirable shopping location.
- 3.20 In May 2006 the Office of Fair Trading (OFT) referred the supply of groceries by retailers in the UK to the Competition Commission (CC) for investigation under Section 131 of the Enterprise Act 2002. The CC's published its findings in April 2008 and reported that "in many respects, competition in the UK groceries industry is effective and delivers good outcomes for consumers, but not all is well". The two main areas of concern highlighted were:
- 1) *that a number of grocery retailers have strong positions in several local markets. Barriers faced by competing retailers that could otherwise enter these markets mean that consumers get a poorer retail*

offer than would otherwise be the case, while those grocery retailers with strong local market positions earn additional profits due to weak competition in those markets, and

- 2) *the transfer of risk and unexpected costs by grocery retailers to their suppliers through various supply chain practices if unchecked will have an adverse effect on investment and innovation on the supply chain and therefore, on consumers.*

- 3.21 A number of steps to address the problems were posed including the recommendation of the introduction of a competition test as part of the planning process for new stores, to favour new retailers other than those which already have significant market shares in an area. Planning for consumer choice and the promotion of competition have been included within the Proposed Changes to PPS6 Planning for Town Centres, consultation document, with final recommendations expected when the guidance is adopted. Recommendations were also made by the Competition Commission to try and prevent retailers using the control of land sites in highly concentrated markets as a means of inhibiting entry by competing retailers. These steps would have implications on the potential new locations that some retailers could look to develop within.
- 3.22 Tesco Stores Ltd challenged the fairness of the proposed new test, and the Competition Appeals Tribunal has now upheld the supermarket's complaints in March 2009, saying the Commission failed to properly assess the implications of the proposed competition test. We understand that the Competition Commission has indicated that it may try to revive the test in a revised form.

Size of Units

- 3.23 The growth of multiple traders and increased competition between companies has meant that the retail structure is increasingly dominated by large companies requiring larger shop units. Shopping centres and out-of-centre development that has been able to accommodate this demand for larger sized units (typically 500-2,000 sq m or larger) have grown in importance, reinforcing the trend of higher order centres and out-of-centre retailing growing in relative importance (i.e. polarisation in the retail hierarchy).
- 3.24 The growth in the size of stores has caused a contraction in the number of shop units and consumer choice. This is particularly evident in the food sector, with a marked decline in the number of smaller and more specialist food retailers (greengrocers, butchers, fishmongers, bakers etc), and a large increase of superstores. This is indicated by Verdict Research which shows a 31% reduction in the total number of convenience stores over the last ten years, as space is concentrated into a smaller number of larger stores.
- 3.25 Whilst the number of superstores (>25,000 sq ft) has increased by 37%, food specialists and off licences/tobacconists have declined by 35% and 57% respectively. These trends may well weaken in the future due to possible market saturation of large foodstores and concerns over lack of competition due to the market dominance of a few key multiples.

Foodstores

- 3.26 A by product of the restriction of new development of large foodstores is the growth in applications to extend existing stores and the changing composition of floorspace within existing foodstores. There is an increasing emphasis on the sale of comparison goods at the expense of convenience goods, as expenditure growth rates for comparison goods are much higher than for convenience goods and margins are greater, although sales densities are often lower. This trend poses an increasing threat to smaller centres, as larger foodstores will increasingly sell a wider product range of day-to-day convenience and comparison goods and services. According to Verdict, non-food floorspace in the larger format stores of the top four grocers now accounts for between 28% (Morrisons) and 50% (Asda) of sales floorspace.

Independent Retailing

- 3.27 According to the House of Commons All-Party Parliamentary Small Shops Group's High Street Britain 2015 (2006) report, the small retail sector is a key driver of entrepreneurship, employment, skills, local economies, innovation, and sophisticated business networks, as well as accessibility to vital goods and services, diversity, social inclusion and community activities. However, contributors to the report expressed concern regarding the pressure independent retailers are coming under from market-led forces and external (macro-environmental) forces.
- 3.28 The report lists factors which have caused concern to small retail operators, namely:
- aggressive expansion and competition by larger competitors;
 - distortion of the supply chain;
 - rising costs of property;
 - crime;
 - poor planning decisions;
 - lack of appropriate business support;
 - disproportional regulatory burdens;
- 3.29 To this list can be added the contemporary concern of dramatically reduced consumer spending brought about by the 'credit crunch' and subsequent recession. These are challenges which small, independent retailers are less well equipped to overcome than their larger competitors. The sector worst affected by this downturn in the economy is clothing & footwear, with this sector accounting for 41.5% of total casualties' sales in a study of 100 retail casualties carried out by Verdict, a research and database provider (UK Retail Casualties during the Credit Crunch: Insight 2009). The study does not follow the many small retailers put out of business during the

recession, instead focusing on medium-to-high profile retailers. Nevertheless, it may be assumed that this is a trend reflected amongst independents as non-essential items are the first to be jettisoned by anxious consumers.

- 3.30 The Verdict study states that the trend in retail casualties followed three stages. At the beginning of the period, weak operators in challenging sectors continued to fail, followed by retailers hit by the housing market's collapse and, finally, by those connected to the banking crisis. The report points out that the credit crunch and subsequent recession did not, in itself, cause these casualties. Instead, it simply precipitated a trend that was already in place – the shakeout of weaker retailers and surplus space in an industry that was suffering from overcapacity. Again, the Verdict report concentrates on medium to large retailers. It is unlikely that small independents are guilty of having surplus space, but it is more than likely that the recession has hastened the demise of weaker independents in the same way as it has their larger counterparts.
- 3.31 Multiples have been able to under-cut smaller independent retailers, prompting customers to migrate for cheaper goods. High Street Britain 2015 (2006) states that between 1991 and 2004, 8,380 petrol forecourts went out of business with hypermarkets now selling over 30% of all fuel sold in the UK despite only operating from 10% of the sites. Additionally, at least 30,000 independent food, beverage and tobacco retailers have gone out of business in the last decade. Pressure is also being exerted by multiples diversifying their offer, for example food supermarkets extending into non-food areas.
- 3.32 Small shops rely on a number of other industries for survival, such as agriculture and manufacturing. Disruptions or changes in this supply chain can have a detrimental effect on the health of retail businesses, an effect which is exacerbated in the case of smaller businesses.
- 3.33 High Street Britain 2015 (2006) describes how promotions by large multiple retailers can mean that goods are being sold at below-cost. This meets the short term needs of the retailer and the consumer, but has the effect of exerting downward pressure on prices across an entire industry which can have severe implications for the margins of smaller suppliers and retailers.
- 3.34 Property costs, the second biggest cost for retailers after wages, have also been a concern to independents. They have historically risen much faster than sales growth, although recent contraction in average commercial rents has put a halt to this for the moment. Nevertheless, smaller retailers have been placed under pressure by this historic increase in rents.

Shopping & Leisure

- 3.35 Due to increased affluence and mobility, and the rise of the internet, shoppers no longer merely shop to satisfy 'needs', they increasingly shop to satisfy 'wants' as well. Retailing in the higher order centres and the more attractive smaller centres is changing and arguably becoming more of a quasi leisure experience. Leisure

spending growth is continuing to outstrip that of retail, and despite the economic slowdown, at the moment consumers seem to be willing to continue spending on leisure.

- 3.36 Quality restaurants, coffee shops, cafes and bars, as well as health and fitness centres and multiplexes in larger centres, are therefore important to attract shoppers and encourage longer stays and higher spending. Better integration of retail and leisure facilities mutually benefits both sectors. Pedestrianised streets and covered retail areas are also important in attracting shoppers, as is the overall attractiveness of the town centre, along with good accessibility and car parking.
- 3.37 A number of factors have helped drive the growth of leisure provision in town centres. Planning policy is important as is the fact that urban living is fashionable. Town centres can offer consumers a much more vibrant atmosphere in which to eat and drink and they also offer a much wider choice of leisure venues, allowing more spontaneous decisions. For bars, restaurants and health & fitness clubs, the attraction of the town centre is 'daytime trade' and the ability to capitalise on proximity to businesses and shoppers.

Internet Shopping/E-Tailing

- 3.38 Online spending is growing at its fastest rate for six years, driven by convenience and low prices, and so far e-retailing is showing no signs of being affected by the recent economic downturn. According to Verdict (2008), the e-retail market grew by 35% between 2006 and 2007, which is considerably higher than the 3.6% growth in the total retail market, and e-retail is expected to continue outperforming the total retail sector over the next five years.
- 3.39 Worth £14.7bn in 2007, the online market is becoming an increasingly important contributor to retail, accounting for 5.2% of all retail sales, (up from 3.8% in 2006). Verdict's research found that almost 66% of UK households now have access to the Internet, with 55.5% having broadband access, which is making online shopping easier, faster and more reliable. As technology continues to improve, it will fuel further growth in the market. Overall the internet shopper population is forecast to grow by approximately 50% between 2007 and 2012.
- 3.40 The online market is dominated by the electrical and food & grocery sub-sectors, which between them account for around half of all sales. The food & grocery sub-sector, with rapid growth of 39.5% in 2007 is expected to overtake electricals in the top spot. Online clothing and footwear sales grew 38% during 2007, and with sales of £1.7bn, clothing & footwear is the UK's third largest online market.
- 3.41 Although only accounting for a very small share of online spending, the market which saw the most dramatic online growth in 2007 was furniture and floor coverings, growing by 41% from £0.4bn to £0.7bn, despite the slowdown in the sector overall, with Ikea's launch of a transactional website being sited as one of the drivers of growth. The music & video sector continues to have the overall highest online market penetration at 30.8% of total sector sales, and this is forecast to double by 2012, which could have implications for physical store requirements.

3.42 As a consequence of this growth, there are huge pressures on retailers as the Internet has provided an attractive alternative for many consumers. Shoppers are selecting their own retail mix online and shopping centres need to compete with this choice, which is not only driven by price and range, but also service and expertise. Town centres will increasingly have to provide a retail experience that the Internet and supermarkets are unable to match, and the market will respond in some way to the varying impacts on different retail sectors. In accordance with PPS6, the emphasis should be on the overall town centre experience, the mix of uses, and not just the retail offer.

Summary

- Incomes and expenditure have shown strong growth over the last 20 years, with retail expenditure growing faster than incomes. This has seen corresponding increases in sales densities within existing retail floorspace, which has also been driven by factors such as high value space efficiency and longer opening hours. Crucially, for Manchester City Council the current economic slow down as in other areas will have significant impacts on the retail sector and growth forecasts will need to reflect recent publications from Experian Business Strategies. This is reflected in Section 5.
- Heightened mobility through increased car ownership, alongside growth in affluence, has favoured larger centres over smaller centres. Shoppers are more willing to travel further afield to higher order centres which have increased in size and importance relative to smaller centres, leading to a consequent fall in their market share. As such, PPS6 now encourages local authorities to be pro-active in trying to encourage development in smaller centres; for example - Levenshulme, within the catchment of larger centres such as Manchester City Centre and the Trafford Centre.
- The composition of town centres has changed through new development, with a growing number of companies requiring larger shop units to meet their shop format ratios. This has again favoured the larger centres which generally have the space to meet such requirements and are able to accommodate this demand. This is particular noticeable in the convenience sector, which has seen a 37% increase in food superstores, but a 31% fall in total number of convenience stores over the last ten years. This has led to current concerns in respect of lack of competition and market dominance.
- Leisure spending growth is continuing to outstrip that of retail, and despite the economic slowdown, at the moment consumers seem to be willing to continue spending on leisure – although this may change in the coming months. Nevertheless, the mix of uses in a town centre is vital to offer choice to shoppers, and quality restaurants, coffee shops, cafes, bars and other leisure facilities are all important to encourage frequency of visit and longer stay times.

4. LEVENSHULME: HEALTH CHECK

Introduction

- 4.1 This section sets out a detailed audit and health check of Levenshulme District Centre, based on the key performance indicators that are set out in chapter 4 of PPS6. Levenshulme is a local convenience and service centre within the Greater Area of Manchester approximately 5km to the southeast of Manchester City Centre; it is identified as a district centre in Manchester's Unitary Development Plan. There is a small number of retail units beyond the designated district centre boundary to the north and south of the centre and this retail element is integrated with and functionally related to the defined retail centre. This health check examines the performance of the entire functioning centre, both within and adjacent to the designated district centre boundary.
- 4.2 Levenshulme is a linear shopping street focussed on Stockport Road, which runs north to south, and accommodates small, densely packed retail units; there are some gaps in the retail frontage at the southern end of the centre where residential usage is interspersed with retail units. Levenshulme is a particularly long retail centre that stretches over 1.5 km. The main area of pedestrian and shopper activity is focussed between Yew Tree Avenue and York Street, between the Tesco Metro and the Cool Trader store. Levenshulme's retail offer serves an ethnically diverse catchment area; this fact is reflected by the wide range of specialist food shops catering to different cultures and ethnic groups.
- 4.3 On the day of the site visit the centre was fairly busy and vibrant and the main street, Stockport Road, was heavily trafficked and car-dominated. The centre suffers from a high vacancy rate and numerous shops, mostly takeaways, do not open for business until later in the evenings which creates much dead retail frontage during the day which detracts from the atmosphere of the area. The character of the area is affected by a high proportion of poorly maintained shop frontages and a lack of coherence among the shop frontages in terms of design, height and appearance which creates a haphazard and disorganised character of the area. Paving throughout most of the centre is of poor quality being mostly tarmac, patchy and of varying widths and levels. There is some tree planting which helps to soften the urban atmosphere but this is sparse.

Diversity of Uses and Retailer Representation

- 4.4 Experian Goad surveyed the centre in December 2007 and established the distribution of different types of town centre uses, including:
- shops selling comparison goods (clothing, footwear and other non-perishable goods);
 - convenience retailers (supermarkets, foodstores, newsagents, butchers, bakers etc.);
 - retail services (dry cleaners, health and beauty parlours, opticians);
 - leisure services (bars, cafes, cinemas, restaurants and takeaways etc.) and

- financial services (building societies, banks, legal services, property services etc.).

4.5 We have updated the category report to take account of the New Tesco Metro store that opened since the Goad survey was undertaken. The Experian Category Report identifies 253 retail units within the survey area, comprising approximately 34,736 sq m of gross retail floorspace. The survey indicates that the split between the different retail categories in terms of unit numbers in Levenshulme is broadly in line with the UK average, although with a greater vacancy rate and a weaker comparison shopping element which is underrepresented when compared with national averages. However, this is not surprising given Levenshulme's designation as a district centre. From our site visits we have updated the Goad Category Report to take account of the increased level of vacancy since the centre was last surveyed in December 2007. Service uses are dominant in Levenshulme in both unit count and floorspace, in contrast to the proportion of units and floorspace in the comparison shopping sector which is not surprising given its District Centre designation (See table 4.1 & 4.2 below).

Table 4.1: Levenshulme Retail Composition – Unit Count by Use Category

Levenshulme District Centre Retail Composition: Unit Count by Use Category				
Retail Category	No. of Units	% of Total	UK Average (%)	Variance
Comparison	54	21.3	34.5	-13.2
Convenience	22	8.7	8.8	-0.1
Service	126	49.8	45.8	4.0
Vacant	48	19.0	10.8	8.2
Miscellaneous	3	1.2	0.2	1.0
Total	253	100	100	

Source: Experian Category Report, (Dec 2007) - Updated with GVA Survey Sept 2009.

Table 4.2: Levenshulme Retail Composition – Floorspace by Use Category

Levenshulme District Centre Retail Composition: Floorspace by Use Category				
Retail Category	Floorspace (sqm)	% of Total	UK Average (%)	Variance
Comparison	7,760	25.2	37.9	-12.71
Convenience	4,158	13.5	14.3	-0.80
Service	14,376	46.7	38.6	8.06
Vacant	4,338	14.1	9.1	4.98
Miscellaneous	177	0.6	0.1	0.46
Total	30,809	100	100	-0.01
<i>Source: Experian Category Report, (Dec 2007) - Updated with GVA Survey Sept 2009.</i>				

Comparison Shopping

- 4.6 There are 54 comparison retail units composing 21.3% of the overall unit count, this is less than the national average of 34.5%. The vast majority of this comparison provision in the centre is made up of independent retailers (52 units composing 96.3% of all comparison units).
- 4.7 At the time of the recent Experian Town Centre Survey there were three clothes shops, all of which were independent retailers. There were five hardware/household goods shops, all independent; the only florist in Levenshulme is an independent retailer, and all nine of the electrical retailers are independently run. There were also three charity shops, four antique shops and two furniture shops.
- 4.8 In terms of floorspace, the distribution of retail categories tells a similar story. With 7,760 sqm of comparison floorspace making up 25.2% of the town's overall floorspace, Levenshulme's provision is a third less than the national average of 37.9%.
- 4.9 A multiple retailer is defined as being part of a national network of nine or more outlets. The presence of multiple outlets in conjunction with a good range of independent retailers can enhance the appeal of a district centre. In Levenshulme multiple retailers compose only 13.4% of the overall shopping offer, and very few of these are comparison retailers. There are very few comparison-based multiple operators in Levenshulme, they include such high street names as Lloyds Pharmacy, Carpetworld and the Big Discount Centre. This highlights the dominance of the independent sector in Levenshulme.

Convenience Shopping

- 4.10 With 22 units, composing 8.7% of the overall unit count convenience shopping is represented broadly in line with the national average (8.8%). 16 of these convenience units are considered independent retailers and

these include four butchers, two newsagents, four convenience stores, four greengrocers or grocers/delicatessens and one off licence. In addition to this independent mix, there are two bakers, and a supermarket, being the Tesco Metro.

- 4.11 Convenience floorspace is just under the national average with 4,158 sq m composing 13.5% of all floorspace, the national average is 14.3%. Multiple operators include Netto - located in the north of the centre, Tesco - on the western side of Stockport Road in the southern section of the centre which opened in 2008 (replacing the former Kwik Save unit), and Cooltrader – located just to the north of the Tesco Store opposite the entrance to Alexandra Terrace. It is therefore apparent that the independent convenience sector in Levenshulme is much better represented in Levenshulme.

Service Provision

- 4.12 With 126 units making up 49.8% of all units in the centre the service provision in Levenshulme is above the national average of 45.8%. According to the Goad report 85.8% of all service units are independently run, and most of these are retail services including 21 health and beauty clinics, six vehicle repair services and four opticians. The independently run leisure service category is also strong with 22 fast food takeaways, three cafes, four restaurants and three public houses.
- 4.13 The proportion of service floorspace is greater than the national average with 14,376 sq m composing 46.7% of all floorspace in the district centre compared with the national average of 38.6%. Financial services are well represented in the centre, being above the national average. Such services include four banks including RBS, Lloyds TSB, Natwest, and Barclays.

Vacant Property

- 4.14 The proportion of vacant retail property is one of the relevant indicators that is taken into account when assessing the vitality and viability of a centre. Vacancy rates are very high in Levenshulme with 48 units making up 19% of the overall unit count compared with the national average vacancy rate of 10.8%. This is an indication that the centre is in danger of becoming less viable as a retail destination and suggests that Levenshulme's performance is on a down ward spiral.
- 4.15 The quantum of vacant floorspace is quite high in Levenshulme with 4,338 sq m of retail floorspace currently vacant; this is an improvement since December 2007 when there was a vacancy level of 5,138 sq m, despite the fact that there are now a greater number of vacant units in the centre. This is because the large floorspace of the new Tesco Metro was previously recorded as vacant. The current vacancy figure represents 14.1% of the overall floorspace in the centre which is much higher than the national average of 9.1%. The Baseline Study (2008) highlighted a perceived high rate of turnover of businesses within the district centre which is consistent with our latest findings.

- 4.16 Vacancies are generally evenly distributed around the centre, but there is a very healthy stretch in the middle of the centre between Yew Tree Avenue and Farm Yard where no vacancies are recorded.

Retailer Demand

- 4.17 The number of retailer requirements that are lodged for a particular centre is an indication of how keen operators are to locate premises in the centre. According to the Focus database, there is currently only one requirement for a premises in Levenshulme, this is on behalf of the British Red Cross who have lodged their intention to open a charity shop in the centre in a unit measuring between 60 sq m and 116 sq m. The number of requirements has reduced from three to one since the Baseline Study was undertaken in 2008. This could be in part due to the current economic crisis which has reduced retailer demand across the country. However, overall the low level of retailer demand indicates that the district centre is not a priority location for retailers to set up operations at present. Overall, it should be pointed out that a reasonably low level of retailer demand would be expected for a centre such as Levenshulme due to its localised shopping role and relatively small catchment population.
- 4.18 Given the number of vacant units in the centre it is unclear why the British Red Cross have not taken up one of the units in the centre. This again could be due to economic circumstances which have altered the retailer's expansion programme.

Physical Environment

- 4.19 Levenshulme is characterised by the low, predominantly two and three-storey red-brick buildings of varying quality, there are some stone and plaster clad buildings as well as some more modern (1960s) buildings. Retail uses are generally found at street level creating a compact urban form though shop fronts are poorly maintained in many cases leaving Levenshulme seeming run down and tired in appearance.
- 4.20 The streetscape consists of varying building designs though most conform to a common building height. Fenestration and shop front height and design varies from building to building and signage frequently protrudes at first floor level, and in some cases overhangs the street adding to the cluttered character of the area.
- 4.21 The footpaths in the centre are generally narrow but are generously proportioned in parts; paving is generally of low quality and tarmac has been used in some parts of the centre. There has been some tree planting but not enough to effectively soften the urban character of the area. There is very little street furniture and the centre is in need of some investment in its public spaces.

Accessibility and Parking Provision

- 4.22 Stockport Road is heavily trafficked and the centre appears quite car-dominated. There is on-street parking available along at most places along the main road. There is a small surface car park just south of the Netto

foodstore with space for approximately 50 cars. There are another two car parks, with capacity for approximately 60 cars, in the middle of Levenshulme on the western side of Stockport Road with access from Farmside Place. There is a larger, 90 space car park further south off Alma Road behind the Nawaab restaurant, also on the western side of Stockport Road. There is also a small 20 space car park in front of the KFC fast food restaurant of Lloyd Road on the eastern side of the main road at the southern end of the centre.

- 4.23 There are numerous bus routes that serve the centre including 169, 171, 172, 178, 191, 192, 197, 297, 713, 745, Y89, and Y90. These services connect Levenshulme to the wider retail network and serve destinations such as Manchester, Stockport, Ashton Under Lyne, Chorlton, Didsbury, Reddish, Stretford, Withington and Wythenshawe among others. In terms of the local rail network, Levenshulme railway station serves the centre and is accessed off Albert Road on the western side of Stockport Road.

Customer View and Behaviour

In-Centre Survey Results

- 4.24 In order to understand the views and behaviours of visitors to Levenshulme, an in-centre survey was conducted in the centre in July 2009. In total, 102 visitors were surveyed over the week between 10am – 4pm, which is a robust sample for the size of the centre. Our analysis of the results is set out below.

Purpose of visit

- 4.25 Of the 102 people who took part in the In-Centre survey 85.3% classed themselves as shoppers and 8.8% considered themselves visitors/day-trippers (Table 4.3).

Table 4.3: Visitor Categories

Shopper	Day Tripper	Worker	Student
85.3%	8.8%	4.9%	1%

- 4.26 Just under two thirds of people stated that the main purpose of their visit was food shopping, while 11.5% came to Levenshulme for non-food shopping (clothing, footwear, soft furnishings or electrical goods).

Table 4.4: Main Purpose of Visit

Food Shopping	Non-Food Shopping	Visiting Friends or Relatives	Financial Services
65.7%	11.8%	3.9%	1%

4.27 Of the 65.7% of people who visited for food shopping, 60.8% of them said they were visiting the Tesco Metro, 21.5% were visiting Netto and 17.7% were in Levenshulme to visit Cooltrader. A further 7.6% were visiting the Big Discount Store, 6.3% were visiting Johnsons, and a further 6.3% were visiting Martins Bakery.

Table 4.5: Foodstores visited (of those who answered "food shopping in table 4.3 above)

Tesco Metro	Big Discount Store	Johnsons	Martins
60.8%	7.6%	6.3%	6.3%

Reasons for Choosing Levenshulme

4.28 Respondents were asked why they chose Levenshulme over other District Centres, 81.3% cited reasons of convenience such as the centre being close to their home, work, or friends and family. Only 2% of respondents chose Levenshulme because it had a good range of shops and services, while another 2% credited Levenshulme's good range independent outlets. 5.9% of people came to visit a particular shop.

Table 4.6: Reasons for Choosing Levenshulme

Convenient Location	To Visit a Particular Shop	Good Range of Shops and Services	Good Range of Independent Shops
81.3%	5.9%	2%	2%

Mode of Travel

4.29 With regards people's mode of travel 62.7% of respondents walked to the centre, while 16.7% came by car. A further 16.7% came by bus and 2% took a taxi. No-one cycled or came by motorbike.

Frequency of Visitation

4.30 When asked how often they visited the centre for shopping purposes 25.5% of people said they came every day or most days, these were included in the 85.6% of people who claim to visit the centre at least once a week. 80.4 % of respondents said they never do late night shopping in Levenshulme and 11.8% said they did late night shopping once a week or more often. 14.8% of people said they come to Levenshulme (during the day) once a week or more frequently for the purposes of eating or drinking, while 66.7% claimed they never visited Levenshulme during the day for the purposes of eating or drinking. The results for visiting the centre at night time for eating and drinking were similar though only 12.8% claimed they came once a week or more frequently and 76.5% said they never visited at night for those purposes.

Table 4.7: How Often Respondents Visit Levenshulme for Shopping (During the Day)

Every Day	2 or 3 Times a Week	Once a Week	Once a Fortnight	Once a Month	Never
25.5%	39.2%	20.6%	3.9%	1%	2%

Table 4.8: How Often Respondents Visit Levenshulme for Late Night Shopping

Every Day	2 or 3 Times a Week	Once a Week	Once a Fortnight	Once a Month	Never
0%	4.9%	6.9%	2.9%	2.9%	80.4%

Table 4.9: How Often Respondents Visit Levenshulme for Eating and Drinking (During the Day)

Every Day	2 or 3 Times a Week	Once a Week	Once a Fortnight	Once a Month	Never
5.9%	2%	6.9%	5.9%	4.9%	66.7%

Table 4.10: How Often Respondents Visit Levenshulme for Late Night Eating and Drinking

Every Day	2 or 3 Times a Week	Once a Week	Once a Fortnight	Once a Month	Never
2%	3.9%	6.9%	2%	2.9%	76.5%

Likes and Dislikes

- 4.31 When asked to name any number of things they liked about Levenshulme the vast majority of respondents cited its convenient location or its accessibility among other things. 12.7% of people made some mention of the cheap prices in the centre and a further 7.8% of people made some mention of the good range of independent stores. When these same people who liked the range of independents were asked what it was they liked about such stores 12.5% of them they liked the cheap prices in independent stores, 12.5% of them said they found the atmosphere more friendly in independent shops, and a further 12.5% liked the idea of the money circulating around in the community.

Table 4.11: What Respondents Like about Levenshulme (Any Mention)

Convenient Location / Accessible	Cheap Prices	Good Range of Independent Stores	Good Range of Well Known Stores
88.2%	12.7%	7.8%	5.9%

- 4.32 When asked what they disliked about Levenshulme 32.4% of people said there was nothing or very little that they did not like, however 19.6% of people complained of traffic congestion, 18.6% of respondents mentioned that they did not like the prevalence of vacant shops in the area, 10.8% cited the lack of foodstores, and a further 10.8% complained of the lack of non-foodstores. A further 7.8% said there were too many takeaways, and 6.9% said the centre was too dirty and 2.9% complained about the amount of litter in the centre.

Table 4.12: What Respondents Dislike about Levenshulme

Traffic Congestion	Vacancy Level	Lack of Non-Food Stores	Lack of Non-Food Stores	Litter and Dirt	Nothing
19.6%	18.6%	10.8%	10.8%	9.8%	32.4%

Competing Centres

- 4.33 Respondents were asked where they mainly shopped for clothing, footwear and other non-food shopping; only 3.9% cited Levenshulme, while 47.1% said Manchester City Centre and 28.4% said they shop in Stockport. Interestingly 3.9% said Central Retail Park, but no other centres featured prominently in respondent's answers.

Table 4.13: Main Choice for Clothing, Footwear and Other Non-Food Shopping

Manchester	Stockport	Levenshulme	Central Retail Park	Gorton
47.1%	28.4%	3.9%	3.9%	2%

Business Survey Results

- 4.34 In consultation with Manchester City Council, we prepared a local business survey questionnaire as part of our evidence gathering exercise. We targeted 20 different business operators in Levenshulme District Centre (We were only able to secure 19 responses) and sought a balanced mix of independent and multiple retailers from a wide range of retail categories and service types to ensure that the survey sample represented the broadest spectrum of district centre retailers. The survey was designed to gain a deeper understanding of the composition and profile of Levenshulme's shops and services, as well as to gauge operators' opinions about and their level of satisfaction with their trading premises, the accessibility of the district centre, the level of car parking and other strengths and weaknesses of the district centre. Please note the answers were multi-choice and will not always add up to 100%.

Duration of Trading and Future Plans

- 4.35 Of all the businesses surveyed 45% have been trading in Levenshulme for over ten years; most of those have remained in the same premises during that time. Only 10% respondents began trading in Levenshulme within the last two years. When asked if their current premises satisfied their needs in terms of location, 90% responded positively. There was 100% satisfaction recorded for respondents with respect to the size and format of their stores.

Table 4.14: Duration of Trading

< 1 Year	1-2 Years	2-3 Years	3-4 Years	4-5 Years	5-10 Years	> 10 Years
5%	5%	20%	5%	5%	15%	45%

- 4.36 When asked what their future plans for their business was the majority of respondents (65%) declared their intentions to continue on as before or stated that they have no plans for the future. According to the survey 15% of operators intend to expand their operations, and a further 10% (2 stores) intended to close their operations.

Turnover compared with Company Averages

- 4.37 Of those operators who have more than one store in the UK, 37.5% stated that their Levenshulme store's turnover was the same as the company's national average. 37.5% claimed that their turnover was less, while none claimed it was higher than the company's national average and a quarter said the comparison was not applicable. This indicates that overall stores in Levenshulme's appear to be trading at a fair performance level but below national averages indicating that there is room for improvement.

Car Parking Accessibility and Environment

- 4.38 In relation to car parking, operators were asked if they felt they had appropriate car parking facilities outside their premises. Only 25% of respondents claim to have appropriate parking outside their shops and the remaining 75% responded negatively. It is worth noting here the recent improvements made by the Council with respect to the loading and off loading of facilities to allow for the servicing of units.
- 4.39 When asked to rate the accessibility of Levenshulme District Centre on a scale where -1 is bad and +1 is good, the mean response from the 20 operators was 0.25, which indicates that the average opinion is marginally better than "neither good nor bad". Regarding respondents' opinions of the centre's environmental quality, the results were worse with a mean response of -0.18.

Strengths and Weaknesses of Levenshulme

- 4.40 When asked what they considered the strengths of Levenshulme's retail offer were, a quarter of businesses cited the centre's range of independent shops, and 15% said the centre's cheap rent rates. 35% of operators considered that the centre has no strengths or that they did not know.

Table 4.15: Main Strengths in the Retail Offer of Levenshulme

Range of Independents	Cheap Rents	Range of Foodstores	Location close to A6	Range of Clothing & Footwear	Good Community	Residential communities surrounding	Nothing / Don't Know
25%	15%	5%	5%	5%	5%	5%	35%

- 4.41 Conversely, when asked what Levenshulme's weaknesses were in terms of its retail offer 35% said the poor range of retailers in general. 15% complained of the lack of suitable parking facilities, while 10% were critical of the poor mix of goods types available in the centre; a further 10% cited the poor choice of national multiple retailers. 20% had no complaints to make.
- 4.42 Opinions on eating and drinking in the district centre during the evening time was generally balanced with a mean response of 0.04 on a scale where -1 is "bad" and +1 is "good". The response for eating during the day was very similar with a mean response of 0.03.
- 4.43 When asked what it was they liked, from their business perspective, about Levenshulme District Centre 25% said the mix of people, 10% said the mix of retailers (independent and multiples) and 5% of people said it was the historic character of the centre. A further 5% liked the location while 45% of people said that there was nothing that they liked about Levenshulme from the perspective of their business.
- 4.44 Negative attributes from a business perspective were also explored and 35% of respondents mentioned poor street-cleaning as the main drawback, a further 35% cited crime, anti-social behaviour and gangs as their main grievance. The cost or accessibility of car parking facilities was cited by 20% of businesses and 10% criticised the limited range and mix of retailers. 20% of retailers could not identify any drawbacks.

Issues and Opportunities

- 4.45 The business survey probed the main issues facing Levenshulme and when this question was put to the local business operators 25% cited crime and security concerns as the main issue facing Levenshulme, 20% mentioned the loss of independent shops and a further 20% mentioned the limited range of national multiples. 15% thought that the issue of car parking was the priority and another 15% thought that the general environmental appearance of Levenshulme was the main issue facing the centre.
- 4.46 Respondents were asked how they thought Levenshulme should be aiming to develop itself and providing a more varied retail /service offer, 15% were of the opinion that Levenshulme should create its own niche independent retail offer, while 10% thought Levenshulme should try and attract more established multiple retailers. Two thirds of businesses thought that a balance between the two approaches is the best way forward.
- 4.47 When attention was turned to the range of potential improvements to Levenshulme District Centre that might help improve their individual businesses, 50% of respondents said that a better range of shops should be encouraged. A quarter said that the district centre's appearance should be improved as a priority and 20% recommended improved parking facilities and a further 10% wanted better security arrangements and 5% wanted cheaper rents for shop keepers.

Household Telephone Survey Results

- 4.48 When asked if they ever used Levenshulme for their shopping or service needs, 23.1% of the respondents to the household telephone survey said that they did. Of these 41.1% of respondents claimed that they chose Levenshulme for reasons of its convenience location in relation to their home, their work or their friends and family. 15.6% chose Levenshulme because it has a good range of shops and service or food and drink. 11.6% of people chose to come to Levenshulme to visit a particular shop or service.
- 4.49 This same group were asked what they use Levenshulme for, and the majority of respondents, (40.9%) cited non-food shopping, 35.2% said small scale or top-up food shopping, and 17.2% said they used Levenshulme for their main food shopping. 21.9% of people who use Levenshulme make use of its financial services, and only 9.7% mentioned that they use the cafes, restaurants or fast food outlets. 11.5% of the respondents said they used personal services in Levenshulme such as hairdressers and laundrette services for example.
- 4.50 When those people who visit Levenshulme for their shopping needs were asked what they liked about Levenshulme, the highest rated response was 16.8% of people liking the good range of independent retailers. 10.8% praised the town's attractive environment. However, the highest proportion of people (42.5%) said that there was nothing that they liked about Levenshulme. This is in contrast to the 52.3% of respondents who said there was nothing they disliked about Levenshulme. However 10.8% of respondents felt that there was a lack of non-food stores, while 10.2% complained of a lack of foodstores. 8.8% complained about parking or traffic congestion, 8% said they disliked the dirty and rundown appearance of the centre, and 5.2% disliked the proliferation of takeaways. 4.2% felt unsafe and disliked the poor security for shoppers and cars.
- 4.51 People were asked to name up to three types of improvements that would persuade them to visit Levenshulme more often, and though 52.7% mentioned nothing in particular or didn't know, 12.7% said they would like to see an improved choice of multiple retailers, 10.8% wanted Levenshulme to attract larger retailers; 7.6% wanted cleaner shopping streets and 6% would like to see improved public transport linkages. 4.7% of respondents would be encouraged to visit the centre more if there were more car parking spaces.
- 4.52 We asked People if they ever did any of their food or grocery shopping in local independent stores, and 43.8% of respondents said that they do shop in independents. We asked this 43.8% what they liked about shopping in independent stores for their food and groceries, 46% of respondents said that it was more convenient or was closer to their home or bus stops. 34.9% felt that there was a better quality of produce on offer in local stores and 10.8% said that they liked the friendly service. 10.1% of respondents said that they were able to find items cheaper, and 8.1% of people said they liked the idea of supporting the local economy.
- 4.53 The 56.2% of people who said they did not visit local independent stores for their food shopping were asked why it was they preferred not to shop locally, 27.5% said that local independents were not big enough to get enough items under one roof; 23.3% said that there was not enough choice in local shops, and 17.1% of them said that independents were too expensive. 13.5% of people said that there were not enough independent stores nearby, and 8.9% said that it was easier or more convenient for them to visit a supermarket. We have

summarised the key differences between people who use independent food shops and those that do not, below in Table 4.16.

Table 4.16: Independent Store Usage (Food Shopping)

Shop in Independents (Food Shopping) 43.8%	Do Not Shop in Independents (Food-Shopping) 56.2%
<p>Reasons for using independents</p> <ul style="list-style-type: none"> • More convenient (46%) • Better quality (34.9%) • More Friendly (22%) • Different / interesting Items (10.8%) • Cheaper Items (10.1%) • Support local economy (8.1%) • No reason / don't know (1.6%) 	<p>Reasons for not using independents</p> <ul style="list-style-type: none"> • Not enough items under one roof (27.5%) • Not enough choice (23.3%) • Too expensive (17.1%) • Not enough local stores (13.5%) • Less convenient (8.9%) • No reason / don't know (11%)

Source: Household Telephone Survey Q05/06 – note: results will not add up to 100% as responses were multi-choice

- 4.54 Those people who shop in local independents for their food-shopping were asked how frequently they visit them: 13.8% of people do so daily while 34.7% visit independents two or three times a week. 38.3% make weekly a trip to local stores and 7.2% shop there fortnightly. 3.6% of people visit independents just once a month and 0.3% visit them every two months or less.
- 4.55 We asked people if they ever visit their local independent retailers for their non-food shopping, and only 32.3% of people said that they did shop in independents. When this group who responded positively were asked what it was that they liked about the local independent foodstores 29.5% said that they could find different and interesting items; 28.9% said they found independents to be more convenient, and 22.5% said that they liked the friendly service of local stores. 16.4% of respondents said that they could find items cheaper and 11.5% thought that independents offered them a better quality of produce.
- 4.56 The 67.7% of people who stated that they did not shop in independent stores for their non-food shopping were asked why they did not use such stores, 25.6% said that local stores did not offer enough choice; 11.1% said that there were too few local independent stores nearby, 8.9% said that items were too expensive, and 8.7% said that local stores could not fit enough items under one roof. 36.9% of respondents said that there was no particular reason why or that they did not know why they do not visit local independents. We have summarised the key differences between people who use independent shops and those that do not below in Table 4.17.

Table 4.17: Independent Store Usage (Non-Food Shopping)

Shop in Independent Stores 32.3%	Do Not Shop in Independent Stores 67.7%
<p>Reasons for using independents</p> <ul style="list-style-type: none"> • More interesting items (29.5%) • More convenient (28.9%) • More friendly service (22.5%) • Cheaper Items (16.4%) • Better quality produce (11.5%) • Support of local economy (7.9%) • Items are easier to find (5.3%) • No reason / don't know (1%) 	<p>Reasons for not using independents</p> <ul style="list-style-type: none"> • Not enough choice (25.6%) • Too few stores nearby (11.1%) • Items too expensive (8.9%) • Not enough items under one roof (8.7%) • Inconvenient / no time (4.2%) • No reason / don't know (36.9%)

Source: Household Telephone Survey Q14/15 note: results will not add up to 100% as responses were multi-choice

- 4.57 Those people who shop in local independents for their non-food shopping were asked how frequently they visit them: 7.5% of people do so daily while 17% visit independents two or three times a week. 18.6% make weekly a trip to local stores and 12.3% shop there fortnightly. 22.7% of people visit independents just once a month and 9.7% visit them every two or three months.
- 4.58 People were asked to name up to three types of improvements that would persuade them to visit Levenshulme more often, and although 57.3% mentioned nothing in particular or didn't know, 10.8% said they would like to see an improved choice of multiple retailers, 7.5% wanted Levenshulme to attract larger retailers and 7% wanted cleaner shopping streets. A further 3.6% of respondents would be encouraged to visit the centre more if there were more independent shops.

Conclusion

- 4.59 Levenshulme is an elongated, linear retail centre that predominantly serves as a local convenience and service centre, rather than a comparison shopping destination; service uses are especially prevalent. Despite the apparent vitality of the area, the centre is facing an increasing level of vacancy which could threaten its viability in the future. The quality of the physical environment is lacking in parts and Levenshulme is struggling to maintain an aesthetic appeal as shop-fronts are poorly maintained in parts of the centre. There appears to have been little investment in the street furniture and the commercial streetscape and the character of the area has suffered as a result, leaving Levenshulme to appear run down and in need of revitalisation.
- 4.60 From reviewing the results of the in-centre survey and the business survey we can build a reliable picture of customer and retailer opinions and views. Our research has revealed the main issues that Levenshulme faces. Increasing vacancy, car parking availability, the lack of larger multiple retailers and the poor maintenance of the centre appear to be the main problems facing Levenshulme.
- 4.61 The results of the survey reveal what a low proportion of people tend to shop in local independent stores. 43.8% of respondents of the household telephone survey claim to visit independents for their food-shopping, while only 32.3% of people said they do non-food shopping in Independent stores. The majority of people who choose

independents for their food and non-food shopping do so for reasons of convenience, and because there is more interesting or better quality items on offer in such independent stores. Local independents are also generally perceived to offer a friendlier service and cheaper goods. Those people who choose to shop in independent stores tend to do so regularly, especially where food shopping is concerned, with 86.8% and 36.8% of these shoppers visiting independents once a week or more often for their food and non-food shopping respectively.

- 4.62 Levenshulme appears to be fulfilling the role of a local service centre with a below average comparison shopping provision. The proliferation of vacant units is beginning to threaten the viability of the centre as the negative aesthetic affects combine with the lack of investment and maintenance in the centre to produce a run down appearance that should be reversed if Levenshulme is to retain or improve its competitiveness in the sub-regional network of retail centres.

5. CAPACITY PROJECTIONS

- 5.1 In this section we estimate the current performance of Levenshulme District Centre as the basis for forecasting the need for additional retail floorspace to the period 2026, incorporating the interim years of 2011, 2016 and 2021. The capacity tables accompanying this assessment are attached in Appendix 1 and 2.
- 5.2 We have used a conventional and widely accepted step-by-step methodology, consistent with best practice, which draws upon the results of the household telephone survey of existing shopping patterns to model the existing flow of available expenditure to Levenshulme and its competing centres. In order to develop the baseline position, we have:
- Calculated the total amount of convenience and comparison goods expenditure that is available within the postal sectors that compose the estimated Levenshulme catchment area;
 - Allocated the available expenditure to the convenience and comparison goods shopping destinations, on the basis of the household telephone survey of spend patterns, so as to provide estimates on current sales and forecasts of future sales;
 - Compared the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities in each shopping destination.
- 5.3 Building on the baseline position, we have explored the capacity for further convenience and comparison goods retail floorspace within the district centre.

Data Inputs

Survey Area and Household Survey

- 5.4 The survey results identify shopping habits of households for both convenience and comparison goods. Where necessary, the survey results have been re-based to remove certain responses, such as 'internet/mail order shopping', to ensure consistency with categories excluded in the expenditure projections. For convenience goods, the household telephone survey included the questions on main food and top-up food shopping but also importantly a series of questions on people's usage of small independent shops including their spend habits on bread, meat, fish, dairy products, fruit and vegetables and 'other' food types. This approach avoids people gearing their responses solely to larger multiple supermarkets and also takes into account the fact that people's convenience shopping habits often do not always follow a standard approach of shopping at only one or two locations. This approach is well suited to a centre like Levenshulme where there is a strong provision of small independent shops.

- 5.5 In order to avoid any double counting with responses e.g. the same responses being given when answering the small independent question and the main/food top-up questions we have merged the three types of food expenditure through an application of weight which reflects the estimated proportion of expenditure accounted for by each type of shopping. Therefore this approach applies a 70%/20% main food/top-up food weighting, with a further 10% weighting attributed to the small independent retailers at Q02.
- 5.6 It should be noted that the spend allocation for small independents shops is in some cases higher than the 10% allocation as people have also indicated that they use independent shops for their main food and top up shopping (Q07 & 09). Therefore the weighting has only been applied to the three different questions and not specifically to the total market shares going to individual stores/supermarkets. Overall, this approach forms a composite pattern of convenience spending, expressed as a market share for each shop or foodstore, for each survey zone.
- 5.7 In relation to comparison goods, the survey also includes five questions on specific comparison goods types, which coincide with Experian Business Strategies definitions of comparison goods expenditure. The retail and needs modelling exercise uses the weighted averages of the household survey responses for each goods type based on the proportion of per capita spend on that goods type. This process establishes the pattern of spending for residents of each zone in terms of the following types of goods:
- Clothing and footwear;
 - Furniture, floor coverings and household textiles;
 - DIY, decorating supplies, and tools;
 - Domestic and small electrical appliances (TV, hi-fi, radio etc.);
 - Personal goods (jewellery, china, glassware, books, stationery, cosmetics, musical instruments, and sports equipment).

Estimates of Population in the Survey Area

- 5.8 Population estimates and forecasts were prepared from the Experian E-marketer in-house system. This provides estimates of future population levels based on trend-line projections and the 2001 census for small, localised areas. This section discusses the performance of existing floorspace using 2009 as the base year.
- 5.9 Overall, the population of the survey area is currently 149,699. It is forecast to grow to 155,003 by 2011, 167,134 by 2016, to 177,446 by 2021 and finally to 184,621 by 2026 (Table 1, Appendix 1). Overall, population is forecast to grow by 23.3% between 2009 and 2026 within the whole survey area.

- 5.10 Table 5.1 highlights the social economic grade of Levenshulme’s catchment area. It is apparent that the proportion of people in the AB category at 19.21% is slightly below the national average (21.6%). Similarly the proportion of those residents in the C1 and C2 categories (29% and 12.1% respectively) are also slightly below the national average. By contrast there is a higher than average proportion of people in the D category (21%) and in the lowest social grade, the E category (18.7%).

Table 5.1: Social Economic Grade of Survey Area

	AB	C1	C2	D	E
Survey Area	19.21%	28.98%	12.11%	21%	18.7%
National Average	21.57%	29.42%	15.23%	17.36%	16.42%

Source: Experian

AB: Higher and Intermediate manager/admin/prof

C1: Supervisory, clerical, junior manager/admin/prof

C2: Skilled manual workers

D: Semi-skilled and unskilled manual workers

E: On state benefit unemployed, lowest grade workers

Available Expenditure in the Survey Area

- 5.11 The Experian E-Marketer System provides estimates of the per capita expenditure for convenience and comparison goods in 2007 prices. We have made deductions for special forms of trading (SFT) which represents expenditure not available to spend in the shops, i.e. Internet and catalogue shopping. We have applied individual per capita expenditure figures across each survey zone to provide a more detailed understanding of available expenditure in different parts of the catchment area.
- 5.12 In terms of expenditure growth in the area, we have drawn on convenience and comparison goods growth rates provided by Experian Business Strategies. These indicate that more growth will take place on comparison goods as opposed to convenience goods; the scope to purchase more food is more limited than the scope to purchase non-food goods. Recent turbulence in the market has caused disruption to expenditure growth rates whereby limited growth is expected for the immediate future, but a return to growth is expected in the medium to long-term. Experian Business Solutions estimate that there will be very little overall growth in convenience goods expenditure between 2009 and 2011, but this will rise to rise to 0.9% in 2011, 1.0% in 2012, growing to 1.1% per annum from 2016 onwards.
- 5.13 Based on Experian’s forecasts we estimate that expenditure on comparison goods will grow by 1.3% per annum from now until 2011, growing to 2.6% per annum between 2011 and 2016, increasing again to 3.1% between 2016 and 2021 as expenditure growth levels begin to normalise. Experian estimate that growth rates will reduce slightly to 3% per annum between 2021 and 2026.

- 5.14 We have generated expenditure by zone to highlight variations across the survey area. Table 2, Appendix 1, applies per capita expenditure within each zone to population forecasts, which indicates that total available convenience goods expenditure within the survey area is currently £226.9m. This is forecast to grow to £235.4m by 2011, to £266m by 2016, to £297.1m by 2021 and finally to £323.8m by 2026. This equates to an overall growth of £97m (42.7%) between 2009 and 2026 (Table 3, Appendix 1).
- 5.15 Comparison expenditure at £300.9m, is currently higher than convenience spend, and is expected to grow to £372.3m by 2016, and to £454.5m by 2021, and finally to £543.1m by 2026. This amounts to an overall growth of £242.1m (80.5%) between 2009 and 2026.

Floorspace Data

- 5.16 The comparison and convenience floorspace data used in our modelling has been drawn from a range of data sources including the Institute of Grocery Distribution (IGD), and Experian Goad town centre category reports. Our floorspace assumptions for the foodstores include, where appropriate, an adjustment to identify the proportion of purely convenience goods floorspace. Most superstores include a proportion of non-food floorspace; we have adjusted the net floorspace to identify the proportion of sales space allocated for convenience goods. This accords with the expenditure data and the expenditure assumptions used.

Convenience Goods Capacity Projections

Levenshulme District Centre

- 5.17 Our methodology estimates the trade draw of Levenshulme District Centre for convenience goods (Table 4, Appendix 1). This comprises an examination of the trade drawn to the Tesco Metro, the Netto foodstore, and the combined independent convenience offer that comes under the 'Other' category.
- 5.18 Based on the results of the telephone survey we examine the performance of the key stores in the centre are trading, we estimate:
- The **Tesco Metro** has a turnover of £2.9m from the catchment area. Based on a net convenience floorspace figure of 813 sqm we estimate that the store has a sales density of £3,600 per sqm. This is much lower than the Tesco company average of £10,873 per sq m. This low performance level is most likely due to the fact that the Tesco store opened only recently and has not yet fully reached a mature level of trading, we would therefore expect this sales density to increase overtime. It is also likely that the store draws further trade and passing trade from beyond our survey area which would increase its turnover.
 - The **Netto** foodstore is located in the north of the centre on the eastern side of Stockport Road. It is well established in Levenshulme. It has an estimated turnover of £1.2m and with 636 sq m of net convenience floorspace the discount store has a sales density of £1,816 per sq m which is far less than Netto's company average level of £6,324 per sq m net. However, we envisage the store's turnover may be

boosted from passing trade, given its location on a key arterial route. This additional turnover would not have been picked up by the telephone survey results.

- 5.19 We advise that the baseline turnover estimates for Levenshulme's foodstores, as derived from the household survey, should be interpreted with care as the telephone survey can sometimes underestimate their performance and specifically their important roles as 'top-up' destinations for shoppers, visitors, local employees, particularly at lunchtimes for snack/lunch time trade and minimal 'pint of milk' top-up shopping. Based on these factors it is likely that the Tesco Metro and Netto store would be actually trading at a higher level than the telephone survey is currently estimating.
- 5.20 In relation to the smaller independent shops in Levenshulme, we have examined the market shares going to individual stores and independent shops in Levenshulme in general from the series of questions at Q2(a-f) of the household survey. We have also included the market shares going to these stores from the main food (Q.07) and top-up (Q.09) questions and, as previously explained, weighted the total responses to average annual per person spend to avoid any double counting.
- 5.21 The column in Table 5 (Appendix 1) entitled 'other stores' assesses the combined turnover of the smaller independent stores in the centre. We estimate based on the results of the household survey that this provision, detailed in Table 7 (Appendix 1), has a total current turnover of approximately £1.5m. The total net convenience floorspace of this combined independent provision is 743 sq m which equates to a sales density of approximately £2,001 sqm net. This suggests that the other smaller shops in the centre are performing reasonably well.
- 5.22 In total, we estimate that convenience provision in Levenshulme has a combined turnover of £5.6m from the survey area which means that Levenshulme has an overall market share of 2.45%. The turnover of convenience floorspace (2,192 sq m net) equates to an overall average sales density of £2,541 per sq m net. This is lower than what we would expect the centre to be achieving and is largely as a result of the weak trading levels of both the Netto and the Tesco Metro stores which the telephone survey indicates are under-trading.
- 5.23 If we compare these results with the GVA Grimley Quantitative Study (2006) it is apparent that the convenience turnover of Levenshulme has reduced from £11.3m to £5.6m. We would suggest this reduction in turnover is as a result of the opening of Tesco in Burnage to the south west of Levenshulme which is capturing £4.6m of trade from the catchment area. Furthermore, Tesco has also recently opened (2008) a store in Gorton which is taking £2.1m from the catchment area. Both of these stores opened after the telephone survey was undertaken which underpinned the findings of the Quantitative Study.
- 5.24 From looking at Table 5 (Appendix 1) we can see that 77.2% of the combined convenience turnover of Levenshulme is derived from Zone 1, which is focussed on the District Centre. Zone 5 attracts 7.7% of the turnover and 6.7% comes from Zone 8; the remainder is derived from the other zones with the exception of Zone 7, which contributes nothing to Levenshulme's turnover. These results reveal that Levenshulme draws very little from Zones 2, 3, and 6.

Convenience Goods Global Capacity

5.25 Based on population and expenditure growth, and the detailed performance analysis of existing floorspace within the centre, we estimate, based on existing market shares that there will be no capacity to support new convenience floorspace over the period to 2026. Our modelling exercises reveal that there will be sufficient convenience floorspace in Levenshulme to absorb the level of available convenience spend in the catchment area for years to come, market shares from each zone could be increased however, if improvements to the shopping environment and the retail offer occur. Our projections are summarised in Table 5.2 below which indicates that by 2011 there will be an estimated shortfall of expenditure of £8.7m with this deficit set to reduce to £7.8m by 2026. It should be noted that projections beyond 2021 should be treated with caution given the fact that margins of error increase over longer time periods.

Table 5.2: Projected Residual Expenditure and Capacity based on different store formats

Year	2011	2016	2021	2026
Residual Expenditure (£000s)	- 8,666	- 8,258	- 7,996	- 7,799
Capacity Assuming Large Store Format (£10,000 per sq m net)	- 867 sqm	- 818 sqm	- 772 sqm	- 735 sqm

Scope for Claw-back

5.26 The assessment above only examines the capacity (or lack of) for additional convenience floorspace based on current market shares to the existing provision within Levenshulme. The telephone survey highlights that a significant proportion of spend from the survey area is leaking to other, more distant convenience destinations; it could be argued that a percentage of this leaked expenditure should be redirected towards Levenshulme, to achieve more sustainable travel/shopping patterns. There may, therefore, be potential for Levenshulme to claw back a proportion of this expenditure to allow existing retailers in the district centre to increase their sales densities and to trade at levels that are nearer to their company averages or the benchmark level for independent retailers. Investment in the quality and aesthetics of the centre as well as coordinated redevelopment could be the main instigator of claw-back in Levenshulme. It is important to consider that any element of claw-back will necessitate a degree of impact on other centres or foodstores outside the survey area, though this impact may be justified by gains in the improved sustainability of travel and shopping patterns.

5.27 The survey area used for the telephone survey area is based on a 'best fit' of postal sectors around Levenshulme and the study area is not considered to fully represent an accurate catchment area for Levenshulme because of the spatial relationship of Levenshulme with other centres in the immediate area, including Longsight, Stockport, and Withington, among others. Based on the network of other centres in the area we therefore assume that in planning for new retail development a reasonable 'core' catchment area for Levenshulme should comprise the following:

Table 5.3: Claw-back of Spend per Survey Zone

Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zon4 6	Zone 7	Zone 8
70%	0%	0%	5%	15%	70%	50%	10%

- 5.28 These proportions have been arrived at by taking account of the proximity of competing centres such as Longsight and Fallowfield (to the north and west). Consequently we would not expect Levenshulme’s core catchment to claw-back any spend from Zones 2 or 3.
- 5.29 Given the interrelationship of the retail network in this part of Manchester there will clearly be catchment overlaps between the centres. Therefore this core catchment area for Levenshulme should not be viewed rigidly as evidently there will be inflow and outflow of spend from this area. However, for this assessment the defined core catchment area serves the purpose of examining the proportion of spend that is reasonable for Levenshulme to claw-back. Our assessment of expenditure claw-back for both main food and top-up expenditure is set out in Appendix 3.

Claw-back of Main-food Expenditure

- 5.30 We have calculated the proportion of trade leaving the catchment area based on where people spend most money on food and groceries from the household telephone survey (Q.07). We have applied the percentage allocation set out above to the market shares to bring the overall leakage of spend down so that the focus of this assessment is solely based on Levenshulme’s core catchment area. In line with our standard approach we have applied the 70% main food weighting to the market shares.
- 5.31 Examining main food shopping habits we estimate that the survey area currently has £180.3m of main-food spend available. Levenshulme is currently absorbing 2.2% of this spend. Given that Levenshulme should be able to claw-back 70% of leakage from Zones 1 and 6, 5% from Zone 4, 15% from Zone 5, 50% from Zone 7 and 10% from Zone 8, we estimate that Levenshulme could potentially claw-back a total of £36.7m as there is a significant amount of leakage that could be directed towards the district centre. Of this leakage it is apparent that approximately £8.7m of main food spend is leaking to the Morrison’s store in Stockport, £4.6m to the Tesco in Burnage, £3m to the Asda in Longsight, £2.7m to the Tesco in Stockport and £1.1m to Asda at Sport City (See table 5, Appendix 3 and table 5.4 below). Plan 2 illustrates the leakage of spend to other destinations.

Table 5.4: Leakage of Main Food Spend

	2009	2011	2016	2021	2026
Expenditure Leakage (£000s)	36,719	37,020	39,818	43,305	46,668

Table 6, Appendix 3

Claw back of Top-up Food Expenditure

- 5.32 Based on the same approach, we have also examined the proportion of top-up trade that is currently leaking from Levenshulme's core catchment area based on shopping habits from Q.09 of the telephone survey. Consistent with our capacity assessment we have applied a 20% top up food weighting to the market shares.
- 5.33 Our assessment highlights that currently £9.9m of top-up convenience expenditure is leaking from the overall survey area to specific destinations outside what we have defined as Levenshulme's core catchment area. Our analysis of the potential claw-back of top-up spend is set out in (Table 5, Appendix 3 and in table 5.5 below)). Clearly not all top-up food trips take place directly from where people live as such trips can take place, in some cases, next to where people work for convenience reasons.

Table 5.5: Leakage from Top-up Spend

	2009	2011	2016	2021	2026
Expenditure Leakage (£000s)	9,887	9,949	10,689	11,615	11,423

- 5.34 If we combine the main food and top-up leakage that we assume Levenshulme could reclaim then we get a total claw-back figure that could reverse the current shortfall in residual expenditure and create an excess of available expenditure that could support additional convenience retail floorspace over the coming years. If we assume that new retail floorspace is to achieve a sales density similar to the company average of a large format supermarket like Tesco or Sainsbury's (£10,000 per sqm) then the total residual expenditure, with clawed-back spend, could accommodate 3,824 sq m net by 2011 which will rise to 4,692 sq m net by 2021 and again to 5,029 sq m net by 2026 (Table 5.6).

Table 5.6: Floorspace Capacity from Claw-Back of Leaked Top-Up Spend from the Core Catchment

	2011	2016	2021	2026
Total Leakage – Main Food and Top-up (£000s)	46,909	50,507	54,920	58,091
Current Residual Spend (£000s)	-8,666	-8,258	-7,996	-7,799
Residual Spend with Claw-back (£000s)	38,243	42,249	46,924	50,292
Sales (£) per sqm net of new Floorspace	10,000	10,000	10,000	10,000
Floorspace Capacity (sq m net)	3,824	4,225	4,692	5,029

- 5.35 Clearly, this assessment of claw-back is a theoretical scenario and would require all spend that is currently leaving Levenshulme's core catchment area to be diverted back to the centre. This is not entirely realistic as it does not take account of commitments/proposals coming forward elsewhere or specifically what the impact would be on others stores in the area. However, undoubtedly an improved retail offer in Levenshulme which enhances the quality, range and choice of the existing shopping offer would help Levenshulme improve its attractiveness as a viable shopping destination and help the district centre compete with other centres in the retail hierarchy.

Comparison Goods Assessment

Levenshulme District Centre

- 5.36 The results of the household telephone survey indicate that comparison shopping in Levenshulme district centre draws 0.9% of available comparison spend in the entire survey area, which is very low even though Levenshulme performs the role of a local convenience and service centre. It is evident that the centre exerts the most influence over Survey Zones 1 and 4. There is some trade draw from Zone 5 but it is minimal and the rest of the zones do not appear to do any comparison shopping in Levenshulme as table 5.6 below indicates.
- 5.37 The majority of people from Zones 1,2, 3, 4 and 5 do most of their comparison shopping in Manchester City Centre; Zones 6, 7 and 8 favour Stockport slightly over Manchester. Longsight also appears to be a popular comparison shopping destination among people in the survey area but to a much lesser extent than Manchester and Stockport.

Table 5.7: Levenshulme's Market Share by Survey Zone

Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
3.6%	-	0.1%	2.3%	1%	0.3%	-	-

- 5.38 The very low market shares across the board demonstrate that Levenshulme does not have a strong comparison offer, with the majority of people unsurprisingly going to higher order centres like Manchester City Centre and Stockport.
- 5.39 On the basis of current market shares, taking account of SFT deductions, we estimate that Levenshulme District Centre currently has a comparison goods turnover of approximately £2.66m, which equates to a sales density of approximately £339 per sqm of net retail floorspace, which is low compared to what we would expect the centre to be achieving.
- 5.40 In assessing capacity for future comparison goods floorspace, we have assumed that the efficiency with which existing floorspace is being used will increase over time, and we have estimated, on the basis of forecasts provided by Experian, that annual growth in existing sales per sqm (net) will improve by 1.5% per annum between 2011 and 2016, rising to 2% per annum from 2016 onwards. Drawing on our experience, we have also assumed that any that new floorspace should achieve approximately £1,000 per sq m (net) on the basis that new floorspace should achieve a slightly higher sales density to what it is currently doing (Table 7, Appendix 2). We have translated the expected growth in available comparison expenditure to an emerging capacity for new floorspace for the target years 2011, 2016, 2021 and 2026.
- 5.41 By virtue of projected growth in population and the estimated increases in available comparison expenditure we expect Levenshulme to have the capacity to accommodate an additional 63 sqm of net retail floorspace by 2011, growing to 577 sq m by 2016, to 1,128 sq m by 2021, and 1,640 sq m by 2026 (See Table 5.7 below).

Table 5.8: Projected Residual Expenditure and Capacity for further comparison floorspace based

Year	2011	2016	2021	2026
Residual Expenditure	£31,000	£311,000	£671,000	£1.08m
Capacity Assuming Sales Density (£1,000 per sqm)	31 sqm	289 sqm	564 sqm	820 sqm

- 5.42 These results indicate that Levenshulme does not have a strong emphasis on comparison shopping which is not surprising given the district centre's role in the sub-regional retail network. Given that over 99.1% of available comparison spend within the survey area is going to centres other than Levenshulme, there may be scope for Levenshulme to claw back a proportion of spend to support further comparison floorspace beyond that set out above. In line with PPS6, any new comparison retail development within Levenshulme would need to relate to the role and function of the centre within the wider hierarchy and the catchment served.

6. STRATEGIC OPTIONS/RECOMMENDATIONS

6.1 Drawing on our qualitative and quantitative analysis, this section considers the key conclusions and policy recommendations moving forwards over the forthcoming LDF period.

6.2 Our detailed qualitative analysis set out in Section 4 has confirmed that Levenshulme is a reasonably vibrant centre but has questionable viability due to the high vacancy levels, the lack of investment in the public realm and the poor quality of much of the shop frontages and the general townscape. It seems clear that Levenshulme is not performing as well as it could be as an important district centre in the south of Manchester. Some of the key performance indicators show that:

- the centre has a good range of independent retailers;
- there is a reasonable balance of independent and multiple convenience stores with Tesco and Netto offering choice in the convenience sector;
- comparison shopping is poorly represented and the district centre's catchment is very restricted, and
- the physical environment is lacking in parts and the centre is struggling to maintain an aesthetic appeal as shop-fronts are poorly maintained in parts of the centre.
- vacancy levels are very high and could threaten the future viability of the centre.

Scope for further retail provision

6.3 Levenshulme is situated amongst a number of other district centres in the local retail hierarchy with Fallowfield located to the west and Longsight immediately to the north. However, Levenshulme is different to these neighbouring centres in terms of the layout, scale, quality and character of its retail offer. Our qualitative assessment set out in Section 4 to this study identified Levenshulme as a centre performing its localised function relatively well but with signs of vulnerability.

6.4 We estimate that the centre currently draws £5.6m of convenience expenditure from the survey area, with over 77% of this derived from Zone 1 alone, the centre's location zone. Based on the performance of other centres in the catchment area by drawing on the results of the Quantitative Retail Needs Study (2006), it is apparent that Levenshulme is one of the weaker district centres in the City in terms of its convenience goods provision. There is no large foodstore in Levenshulme and the majority of people in the centre's core catchment area use the Asda store to the north of the centre in Longsight, the Morrison's in Stockport and the three Tesco stores in Gorton, Stockport and Burnage. The Tesco Metro store in the south of the centre is currently the key performer in the centre attracting 52% of the centre's turnover.

- 6.5 Although our quantitative need assessment, based on existing market shares, has identified no capacity for further convenience floorspace in the centre, in purely qualitative terms we consider that the centre would clearly benefit a more attractive retail offer including the provision of more convenience floorspace.
- 6.6 Our assessment has however identified a significant leakage of spend from what we have defined as Levenshulme's 'core catchment area'. We have identified that approximately £46.9m of convenience spend is leaking to other destinations beyond the centre's core catchment area. In a theatrical scenario where all of this expenditure could be clawed back to the centre we identify, taking into account the existing negative residual spend in the centre, that there would be scope for 3,824 sq m net of floorspace by 2011, which would be more than sufficient to accommodate a full conforming foodstore in the centre.
- 6.7 However, If proposals do come forward for new retail development, it will be necessary to assess the extent to which shoppers and spend can be 'clawed back' to the centre to support any additional floorspace and more importantly the impact this could have on neighbouring centres including Longsight which currently attracts a significant proportion of trade from what we define as Levenshulme's 'core catchment area'.
- 6.8 Overall, it is evident that the key area of vulnerability in the centre is its relatively high vacancy level and physical environment. Thus, the LDF strategy for the centre should also aim to promote the occupation of a number of vacant units in the centre. Any improvement in the attraction and performance of the centre and its existing floorspace could be achieved through, for example, environmental improvements and improved accessibility. Small scale extensions to existing retail development or infill development should also be encouraged to in order to consolidate the centre over the LDF period. It may also be necessary to consider the conversion of long term vacant units in secondary and tertiary shopping areas to alternative uses, such as residential. We recommend that the Council should therefore carefully monitor changes in vacancies in the centre over time to help measure the impact of new policies and investment.

Maintaining Diversity

- 6.9 Overall, we consider that the district centre's role and function appears to be struggling to meet the expectations for a second tier centre below the principal centre of Manchester, and there are clear signs pointing to areas for improvement and consolidation over the LDF period. Research shows that it is important for a centre's retail offer to comprise a mix of smaller independent and specialist operators, as diversification can help to underpin the character and uniqueness of individual centres.
- 6.10 Presently the centre has very few multiple retailers and is in no danger of being described as a clone town, in fact encouraging the presence of some well known multiples would enhance the range of retailers providing more choice for the shopping population, and improving the overall attractiveness of the centre. Therefore policies that encourage the improvement of the public realm for aesthetic purposes and to enhance the pedestrian environment should be promoted.

6.11 Improvements to the physical environment could include a policy on street cleaning, graffiti removal and general maintenance of the public realm within the designated district centre boundary. The quality of the physical and pedestrian environment in Levenshulme will be crucial to attract and maintain existing retailers and service businesses and encourage people to keep visiting the centre. The local business community could benefit through the Council's commitment to pursue a strategy for investment, including:

- Public realm improvements;
- Initiatives to improve and maintain shop-fronts;
- Improved street cleaning;
- Introduce security measures such as CCTV and community patrols;
- Local highway improvements; and
- The provision of more modern town centre parking.

6.12 The LDF and the future strategy for Levenshulme should therefore also seek to enhance the environment and facilitate pedestrian movement around the centre and provide initiatives to maintain and improve shop frontages.

6.13 Clearly introducing more car parking into the centre would be of benefit to local businesses with 75% of businesses acknowledging in the business survey that they do not currently have appropriate levels of car parking outside their premises. However, any additional car parking would need to be successfully integrated into the centre and not be dedicated solely to any new retail provision in order for local business to benefit.

6.14 Controlling the specific uses within a centre can also help to protect the prime retail areas within a centre. Levenshulme is a very elongated centre with the primary focus of retail activity in the south of centre in and around the key multiple retailers of Tesco, Cool Trader and the Big Discount store. We would recommend that the Council introduce primary and secondary frontages which would comprise a Primary Shopping Area in the centre. More recently, the revised Use Classes Order has given local authorities greater control over the mix of A3/4 and 5 restaurant, café, pubs and fast food takeaways, and this could be taken advantage of in Levenshulme to protect the vitality and viability of the centre. It would seem appropriate therefore for the LDF to provide greater protection of uses in the primary and secondary frontages resisting fast food restaurants where necessary, and allowing more flexibility beyond these frontages but perhaps still within the primary shopping area.

Management Tools

6.15 Overall, it is important to improve Levenshulme's position and retail offer but also to increase or improve the retail provision in the centre, particularly its comparison offer provided it is of an appropriate scale and is

consistent with the centre's role and function. Evidently, the key objective should be to maintain a diverse retail offer in centres whilst also exploring options to enhance the environment and connectivity of the centre. Planning polices can help to deliver such objectives. However centres such as Levenshulme can also benefit significantly from focused management to facilitate business partnership working between key stakeholders, commercial contacts with key operators (both existing and potential), the monitoring of key performance indicators, and the promotion of marketing and publicity campaigns. This could take the form of a town centre partnership or the appointment of a centre manager.

6.16 The recent Government initiative 'Looking After our Town Centres', published in April 2009 by the DCLG recognises that a strong partnership between local people, local businesses and local councils can help to set a clear vision for their future of a centre and implement strategies for achieving that vision. It recognises that local interest groups working together in the form of a town centre partnerships can:

- create a forum to engage local stakeholders to discussion and collaboration;
- shape and influence organisational agendas to develop a shared strategic approach to town centre development;
- deliver more services and/or provide a channel for additional services and enhanced delivery;
- facilitate access to funding and resource opportunities to enhance town centres;
- provide flexibility, innovation and extra financial and human resources to help solve problems.

6.17 Based on the issues identified in Levenshulme, we would recommend the establishment of a town centre manager role or a town centre partnership in order to facilitate its future direction, growth and enhanced vitality and viability.

6.18 Other initiatives which could be explored include the potential to set up a Business Improvement District (BIDs) in order to provide sustainable funding for Levenshulme over the course of the LDF period. The UK models differ from the North American model in that it is the operators/occupiers rather than the owners that are subject to a levy (similar to a service charge for shopping centres) which goes towards an agreed objective for the centre. This can range from additional community policing or street cleaning, through to marketing and promotional events, over and above the local authority's existing funding and services. It is important to state that BIDs are not a replacement for existing Council's services, but represent 'added value'. The success of these BIDs depends on the development of a strong and robust business plan at the outset that has the backing of the key stakeholders.

PLAN 1

SURVEY AREA

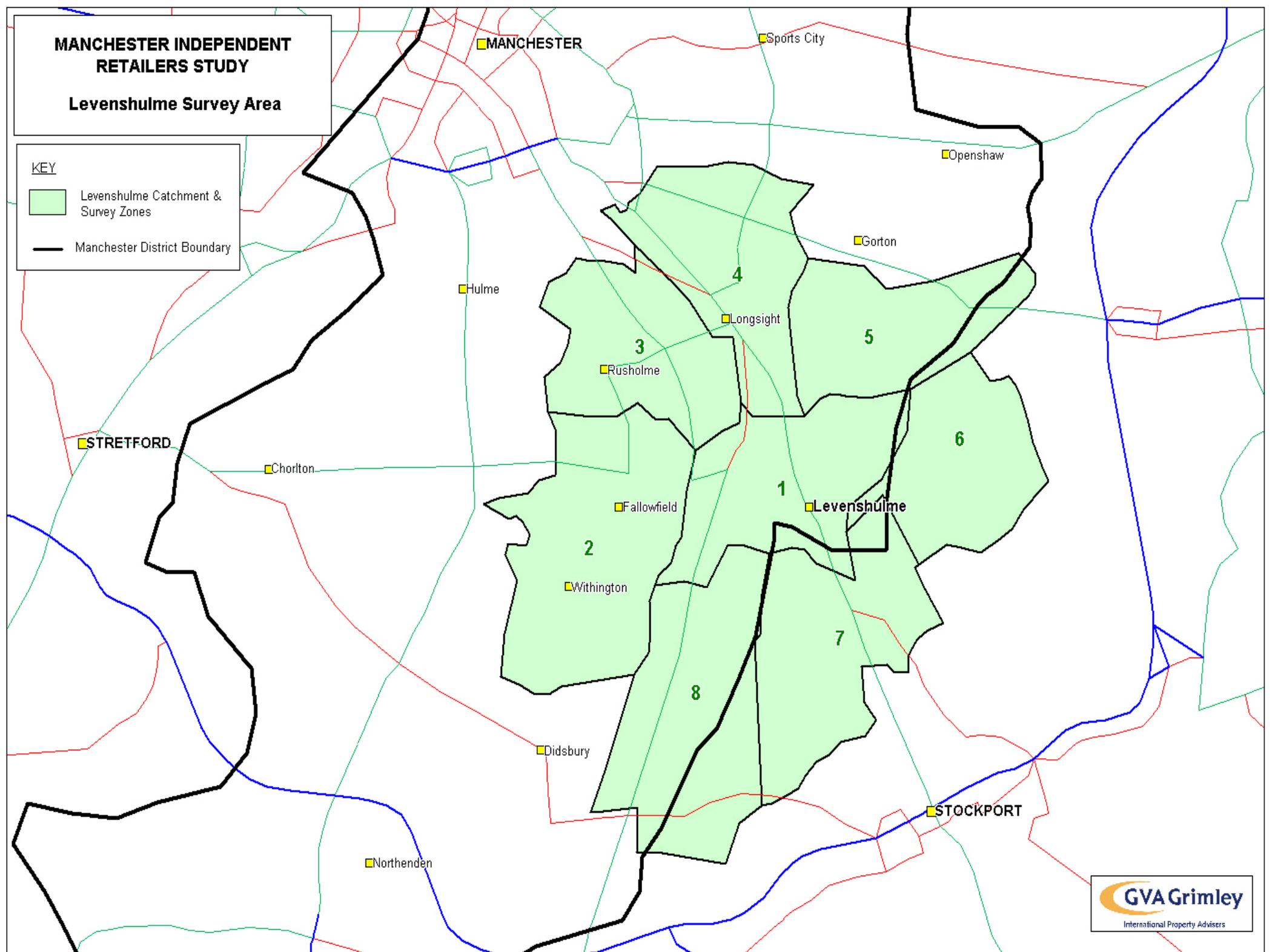
MANCHESTER INDEPENDENT RETAILERS STUDY

Levenshulme Survey Area

KEY

 Levenshulme Catchment & Survey Zones

 Manchester District Boundary



PLAN 2

LEAKAGE OF CONVENIENCE SPEND

**MANCHESTER INDEPENDENT
RETAILERS STUDY**

**Levenshulme Leakage
(Main Food and Top-Up)**

KEY

Catchment Areas & Survey Zones

- Levenshulme Catchment & Survey Zones
- Manchester District Boundary
- Competing Stores
- Core catchment (indicative)

STRETFORD

MANCHESTER

Asda Sport City

£1.1m
2.0%

£2.3m
4.2%

Tesco Gorton

£3.2m
5.8%

Asda Longsite

Sainsbury's Denton

£2.4m
4.3%

£1.1m
2.0%

Sainsbury's Fallowfield

Levenshulme

£9.8m
17.7%

Morrisons Stockport

£5.1m
9.3%

Tesco Burnage

£2.7m
4.8%

Tesco Stockport

STOCKPORT

Tesco East Didsbury

£0.8m
1.5%

Core Catchment

Zone 1	100%
Zone 2	25%
Zone 3	5%
Zone 4	30%
Zone 5	5%
Zone 6	5%
Zone 7	5%



APPENDIX 1

CONVENIENCE CAPACITY TABLES

LEVENSHULME INDEPENDENT STUDY
RETAIL STUDY OCTOBER 2009
 CONVENIENCE MODELLING

TABLE 1
SURVEY AREA POPULATION FORECASTS

Survey Zone	Postcode Sector Groupings	POPULATION				
		2009	2011	2016	2021	2026
1	M19 2, M19 3	19,205	19,702	20,870	21,953	22,716
2	M14 6, M20 4, M20 4	33,782	36,361	41,558	45,347	47,537
3	M13 0, M14 5	23,669	25,035	28,167	30,596	32,213
4	M12 4, M12 5	12,970	13,297	14,088	14,808	15,502
5	M18 7	11,559	11,674	12,161	12,746	13,224
6	SK5 6	14,393	14,504	14,974	15,498	15,977
7	SK4 4, SK4 5	15,780	15,834	16,143	16,576	16,930
8	M19 1, SK4 3	18,341	18,596	19,173	19,922	20,522
TOTAL		149,699	155,003	167,134	177,446	184,621

SOURCE: Experian Business Solutions

TABLE 1A
POPULATION GROWTH RATES

POPULATION INCREASE			
2009-2011 (%)	2009-2016 (%)	2009-2021 (%)	2009-2026 (%)
2.6	8.7	14.3	18.3
7.6	23.0	34.2	40.7
5.8	19.0	29.3	36.1
2.5	8.6	14.2	19.5
1.0	5.2	10.3	14.4
0.8	4.0	7.7	11.0
0.3	2.3	5.0	7.3
1.4	4.5	8.6	11.9
3.5	11.6	18.5	23.3

LEVENSHULME INDEPENDENT STUDY

RETAIL STUDY OCTOBER 2009

CONVENIENCE MODELLING

TABLE 2

CONVENIENCE GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2007 PRICES)

GROWTH IN PER CAPITA RETAIL EXPENDITURE:													
		2007-2009		0.2% pa									
		2009-2011		0.0% pa									
		2011-2016		0.8% pa									
		2016-2021		0.9% pa									
		2021-2026		0.9% pa									
ZONE	2007		2009		2011		2016		2021		2026		
	Minus SFT at 2.3%		Minus SFT at 3.0%		Minus SFT at 3.5%		Minus SFT at 4.0%		Minus SFT at 4.0%		Minus SFT at 4.0%		
1	1,556	1,520	1,562	1,515	1,562	1,508	1,626	1,561	1,700	1,632	1,778	1,707	
2	2,552	2,493	2,562	2,485	2,562	2,473	2,666	2,560	2,789	2,677	2,916	2,800	
3	1,281	1,252	1,286	1,248	1,286	1,241	1,338	1,285	1,400	1,344	1,464	1,405	
4	1,481	1,447	1,487	1,442	1,487	1,435	1,547	1,485	1,618	1,554	1,692	1,625	
5	1,501	1,466	1,507	1,462	1,507	1,454	1,568	1,506	1,640	1,575	1,715	1,647	
6	1,567	1,531	1,573	1,526	1,573	1,518	1,637	1,572	1,712	1,644	1,791	1,719	
7	1,737	1,697	1,744	1,692	1,744	1,683	1,815	1,742	1,898	1,822	1,985	1,906	
8	1,718	1,678	1,725	1,673	1,725	1,665	1,795	1,723	1,877	1,802	1,963	1,885	

Source: Experian

TABLE 3

SURVEY AREA CONVENIENCE GOODS RETAIL EXPENDITURE FORECASTS

GROWTH IN PER CAPITA RETAIL EXPENDITURE:					
Convenience Goods		2007-2009		0.2% pa	
		2009-2011		0.0% pa	
		2011-2016		0.8% pa	
		2016-2021		0.9% pa	
		2021-2026		0.9% pa	
ZONE	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	29,103	29,702	32,572	35,832	38,776
2	83,960	89,904	106,376	121,393	133,086
3	29,528	31,071	36,191	41,113	45,269
4	18,707	19,080	20,927	23,005	25,186
5	16,897	16,977	18,309	20,069	21,775
6	21,965	22,020	23,535	25,475	27,465
7	26,694	26,647	28,125	30,203	32,261
8	30,687	30,953	33,039	35,902	38,678
TOTAL	226,854	235,401	266,035	297,089	323,819

Source: Tables 1 & 2

LEVENSHULME INDEPENDENT STUDY
RETAIL STUDY OCTOBER 2009
 CONVENIENCE MODELLING

TABLE 4
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	TESCO METRO					NETTO					OTHER STORES					TOTAL				
	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	9.0	9.0	9.0	9.0	9.0	1.5	1.5	1.5	1.5	1.5	4.2	4.2	4.2	4.2	4.2	14.8	16.8	16.8	16.8	16.8
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
3	0.4	0.4	0.4	0.4	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.4	0.4	0.4	0.4
4	0.0	0.0	0.0	0.0	0.0	0.9	0.9	0.9	0.9	0.9	0.2	0.2	0.2	0.2	0.2	1.1	1.1	1.1	1.1	1.1
5	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	0.4	0.4	0.4	0.4	0.4	2.5	2.5	2.5	2.5	2.5
6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
8	0.0	0.0	0.0	0.0	0.0	1.2	1.2	1.2	1.2	1.2	0.0	0.0	0.0	0.0	0.0	1.2	1.2	1.2	1.2	1.2

SOURCE: Household Survey, June 2009

TABLE 5
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2007 PRICES

Catchment Zone	TESCO METRO					NETTO					OTHER STORES					TOTAL				
	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	2,631	2,685	2,944	3,239	3,505	442	451	495	545	589	1,226	1,251	1,372	1,509	1,633	4,299	4,388	4,812	5,293	5,728
2	0	0	0	0	0	0	0	0	0	0	131	140	166	189	207	131	140	166	189	207
3	118	124	145	164	181	0	0	0	0	0	8	8	10	11	12	126	133	154	176	193
4	0	0	0	0	0	170	174	190	209	229	29	30	33	36	40	200	204	223	246	269
5	177	178	192	211	229	177	178	192	211	229	73	74	79	87	94	428	430	464	508	552
6	0	0	0	0	0	0	0	0	0	0	11	11	12	13	14	11	11	12	13	14
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	365	368	393	427	460	9	9	9	10	11	374	377	402	437	471
TOTALS	2,926	2,988	3,281	3,614	3,915	1,155	1,172	1,271	1,392	1,507	1,487	1,523	1,681	1,855	2,011	5,569	5,682	6,233	6,862	7,434

SOURCE: Tables 3 & 4

LEVENSHULME INDEPENDENT STUDY
RETAIL STUDY OCTOBER 2009
 CONVENIENCE MODELLING

TABLE 6
CONVENIENCE GOODS FLOORSPACE

	Net Floorspace Sq m
Levenshulme District Centre	2,192
Total	2,192

SOURCE: Experian Category Report

Table 7
LEVENSHULME CONVENIENCE PROVISION

Store	Gross Flsp (sqm)	Net Convenience (sqm)	Co Average Sales (£ per sq m net)	Average Turnover (£000s)	Actual Turnover (£000s)	Actual Sales Density (£000s)
Tesco Metro	1,250	813	10,873	8,840	2,926	3,600
Netto	850	636	6,324	4,022	1,155	1,816
Independents	1,143	743	2,000	1,486	1,487	2,002
TOTAL	3,243	2,192	6,546	14,348	5,569	2,541

LEVENSHULME INDEPENDENT STUDY

RETAIL STUDY OCTOBER 2009

TABLE 8
FUTURE SHOP FLOORSPACE CAPACITY IN LEVENSHULME

	Sales Efficiency Increase		2008-2011	2011-2016	2016 onwards
					0
					0.20%
					0.50%
	CONVENIENCE GOODS				
	2009	2011	2016	2021	2026
Residents Spending (£000)	5,569	5,682	6,233	6,862	7,434
Existing Shop Floorspace (sq m net)	2,192	2,192	2,192	2,192	2,192
Sales per sqm net £	2,541	6,546	6,611	6,778	6,949
Sales from Existing Floorspace (£000)	5,569	14,348	14,492	14,858	15,233
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	-8,666	-8,258	-7,996	-7,799
Sales per sq m net in new shops (£) Based on large store format (see note 1)	1,800	1,800	1,818	1,864	1,911
Capacity for new floorspace (sq m net)	0	-4,814	-4,542	-4,290	-4,081

APPENDIX 2

COMPARISON CAPACITY TABLES

LEVENSHULME INDEPENDENT STUDY

RETAIL STUDY OCTOBER 2009

COMPARISON MODELLING

TABLE 1
SURVEY AREA POPULATION FORECASTS

Survey Zone	Postcode Sector Groupings	POPULATION				
		2009	2011	2016	2021	2026
1	M19 2, M19 3	19,205	19,702	20,870	21,953	22,716
2	M14 6, M20 4, M20 4	33,782	36,361	41,558	45,347	47,537
3	M13 0, M14 5	23,669	25,035	28,167	30,596	32,213
4	M12 4, M12 5	12,970	13,297	14,088	14,808	15,502
5	M18 7	11,559	11,674	12,161	12,746	13,224
6	SK5 6	14,393	14,504	14,974	15,498	15,977
7	SK4 4, SK4 5	15,780	15,834	16,143	16,576	16,930
8	M19 1, SK4 3	18,341	18,596	19,173	19,922	20,522
TOTAL		149,699	155,003	167,134	177,446	184,621

SOURCE: Experian Business Solutions

TABLE 1A
POPULATION GROWTH RATES

POPULATION INCREASE			
2009-2011 (%)	2009-2016 (%)	2009-2021 (%)	2009-2026 (%)
2.6	8.7	14.3	18.3
7.6	23.0	34.2	40.7
5.8	19.0	29.3	36.1
2.5	8.6	14.2	19.5
1.0	5.2	10.3	14.4
0.8	4.0	7.7	11.0
0.3	2.3	5.0	7.3
1.4	4.5	8.6	11.9
3.5	11.6	18.5	23.3

LEVENSHULME INDEPENDENT STUDY
RETAIL STUDY OCTOBER 2009
 COMPARISON MODELLING

TABLE 2
COMPARISON GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2007 PRICES)

GROWTH IN PER CAPITA RETAIL EXPENDITURE:												
		2007-2009		0.4% pa								
		2009-2011		0.1% pa								
		2011-2016		2.5% pa								
		2016-2021		2.8% pa								
		2021-2026		2.8% pa								
ZONE	2007		2009		2011		2016		2021		2026	
	Minus SFT at 8.0%		Minus SFT at 10.0%		Minus SFT at 11.3%		Minus SFT at 12.5%		Minus SFT at 12.5%		Minus SFT at 12.5%	
1	2,668	2,455	2,689	2,420	2,695	2,391	3,049	2,668	3,500	3,063	4,019	3,516
2	2,552	2,348	2,572	2,315	2,578	2,287	2,916	2,552	3,348	2,930	3,844	3,363
3	2,173	1,999	2,190	1,971	2,195	1,948	2,483	2,173	2,851	2,495	3,273	2,864
4	2,272	2,090	2,290	2,061	2,295	2,036	2,596	2,272	2,981	2,608	3,422	2,994
5	2,301	2,117	2,319	2,088	2,324	2,062	2,629	2,301	3,019	2,641	3,466	3,033
6	2,644	2,432	2,665	2,399	2,671	2,370	3,021	2,644	3,469	3,035	3,982	3,485
7	3,086	2,839	3,111	2,800	3,117	2,766	3,527	3,086	4,049	3,543	4,648	4,067
8	2,872	2,642	2,895	2,606	2,901	2,574	3,282	2,872	3,768	3,297	4,326	3,785

Source: Experian

TABLE 3
SURVEY AREA COMPARISON GOODS RETAIL EXPENDITURE FORECASTS

GROWTH IN PER CAPITA RETAIL EXPENDITURE:					
Comparison Goods		2007-2009		0.4% pa	
		2009-2011		0.1% pa	
		2011-2016		2.5% pa	
		2016-2021		2.8% pa	
		2021-2026		2.8% pa	
ZONE	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	46,485	47,114	55,676	67,237	79,875
2	78,212	83,171	106,047	132,849	159,885
3	46,661	48,760	61,202	76,323	92,254
4	26,734	27,078	32,005	38,622	46,418
5	24,129	24,076	27,980	33,668	40,103
6	34,524	34,372	39,588	47,040	55,674
7	44,179	43,797	49,813	58,722	68,857
8	47,788	47,870	55,060	65,682	77,678
TOTAL	300,924	308,368	372,311	454,461	543,065

Source: Tables 1 & 2

LEVENSHULME INDEPENDENT STUDY
RETAIL STUDY OCTOBER 2009
 COMPARISON MODELLING

TABLE 4
COMPARISON GOODS ALLOCATION - MARKET SHARE %

Zone	LEVENSHULME				
	2009 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	3.6	3.6	3.6	3.6	3.6
2	0.0	0.0	0.0	0.0	0.0
3	0.1	0.1	0.1	0.1	0.1
4	2.3	2.3	2.3	2.3	2.3
5	1.0	1.0	1.0	1.0	1.0
6	0.3	0.3	0.3	0.3	0.3
7	0.0	0.0	0.0	0.0	0.0
8	0.0	0.0	0.0	0.0	0.0
Total Market Share ZoNES 1-8	0.9%	0.9%	0.9%	0.9%	0.9%

SOURCE: Telephone Survey, June 2009

TABLE 5
COMPARISON GOODS ALLOCATION - SPEND (£000s) 2007 PRICES

Zone	LEVENSHULME				
	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	1,678	1,701	2,010	2,427	2,883
2	0	0	0	0	0
3	40	42	52	65	79
4	606	614	726	876	1,053
5	246	245	285	343	409
6	95	94	109	129	153
7	0	0	0	0	0
8	0	0	0	0	0
Total	2,665	2,696	3,182	3,840	4,576

SOURCE: Tables 3 & 4

TABLE 6
COMPARISON GOODS FLOORSPACE

	Net Floorspace Sq m
Levenshulme	7,860
Total	7,860

SOURCE: Experian Category Report

LEVENSHULME INDEPENDENT STUDY
RETAIL STUDY OCTOBER 2009
 COMPARISON MODELLING

TABLE 7
FUTURE COMPARISON RETAIL FLOORSPACE CAPACITY

Comparison Goods Sales Efficiency Increase		2009-2011	0.0%			
		2011-2016	1.5%			
		2016 Onwards	2.0%			
TOWN CENTRE COMPARISON GOODS						
		2009	2011	2016	2021	2026
1	Total Spend from Survey Area (000s)	300,924	308,368	372,311	454,461	543,065
2	Market Share of Comparison Goods	0.9	0.9	0.9	0.9	0.9
3	Total Town Centre Turnover (£000s)	2,665	2,696	3,182	3,840	4,576
4	Existing Comparison Retail Floorspace in Town Centre (sq m net)	7,860	7,860	7,860	7,860	7,860
5	Sales (£ per sq m) net	339	339	365	403	445
6	Sales from Existing Floorspace (£000s)	2,665	2,665	2,871	3,169	3,499
7	Residual Expenditure (£000s)	0	31	311	671	1,077
8	Sales per sq m net in new shops (£)	1,000	1,000	1,077	1,189	1,313
9	Capacity for new floorspace (sq m net)	0	31	289	564	820

NOTE: Sales Efficiency (Row 7) grown 1.5% 2011-2016 then 2.0% from 2016 onwards

SOURCE:

- (1) Derived from Table 3.
- (2) Derived from Table 4.
- (3) Derived from Table 5.
- (4) Derived from Table 6
- (5) Derived from steps 3 and 4.
- (6) Derived from steps 4 and 5.
- (7) Derived from steps 3 and 6.
- (8) Assumes new comparison floorspace will trade a £500 per sqm net, with an annualk increasing sales efficiency.
- (9) Derived from subtracting steps 7 and 8.

APPENDIX 3

LEAKAGE CLAW-BACK ASSESSMENT

MAIN FOOD AND TOP-UP EXPENDITURE

LEVENSHULME INDEPENDENT STUDY

RETAIL STUDY OCTOBER 2009

LEAKAGE / CLAW-BACK

TABLE 1
SURVEY AREA POPULATION FORECASTS

Survey Zone	Postcode Sector Groupings	POPULATION				
		2009	2011	2016	2021	2026
1	M19 2, M19 3	19,205	19,702	20,870	21,953	22,716
2	M14 6, M20 4, M20 4	33,782	36,361	41,558	45,347	47,537
3	M13 0, M14 5	23,669	25,035	28,167	30,596	32,213
4	M12 4, M12 5	12,970	13,297	14,088	14,808	15,502
5	M18 7	11,559	11,674	12,161	12,746	13,224
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TOTAL		149,699	155,003	167,134	177,446	184,621

SOURCE: Experian Business Solutions

TABLE 1A
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POPULATION INCREASE			
2009-2011 (%)	2009-2016 (%)	2009-2021 (%)	2009-2026 (%)
2.6	8.7	14.3	18.3
7.6	23.0	34.2	40.7
5.8	19.0	29.3	36.1
2.5	8.6	14.2	19.5
1.0	5.2	10.3	14.4
0.8	4.0	7.7	11.0
0.3	2.3	5.0	7.3
1.4	4.5	8.6	11.9
3.5	11.6	18.5	23.3

LEVENSHULME INDEPENDENT STUDY

RETAIL STUDY OCTOBER 2009

LEAKAGE / CLAW-BACK

TABLE 2

CONVENIENCE GOODS RETAIL EXPENDITURE FORECASTS PER CAPITA (2007 PRICES)

GROWTH IN PER CAPITA RETAIL EXPENDITURE:													
		2007-2009		0.2% pa									
		2009-2011		0.0% pa									
		2011-2016		0.8% pa									
		2016-2021		0.9% pa									
		2021-2026		0.9% pa									
ZONE	2007		2009		2011		2016		2021		2026		
	Minus SFT at 2.3%		Minus SFT at 3.0%		Minus SFT at 3.5%		Minus SFT at 4.0%		Minus SFT at 4.0%		Minus SFT at 4.0%		
1	1,556	1,520	1,562	1,515	1,562	1,508	1,626	1,561	1,700	1,632	1,778	1,707	
2	2,552	2,493	2,562	2,485	2,562	2,473	2,666	2,560	2,789	2,677	2,916	2,800	
3	1,281	1,252	1,286	1,248	1,286	1,241	1,338	1,285	1,400	1,344	1,464	1,405	
4	1,481	1,447	1,487	1,442	1,487	1,435	1,547	1,485	1,618	1,554	1,692	1,625	
5	1,501	1,466	1,507	1,462	1,507	1,454	1,568	1,506	1,640	1,575	1,715	1,647	
6	1,567	1,531	1,573	1,526	1,573	1,518	1,637	1,572	1,712	1,644	1,791	1,719	
7	1,737	1,697	1,744	1,692	1,744	1,683	1,815	1,742	1,898	1,822	1,985	1,906	
8	1,718	1,678	1,725	1,673	1,725	1,665	1,795	1,723	1,877	1,802	1,963	1,885	

Source: Experian

TABLE 3

SURVEY AREA CONVENIENCE GOODS RETAIL EXPENDITURE FORECASTS

GROWTH IN PER CAPITA RETAIL EXPENDITURE:					
Convenience Goods		2007-2009		0.2% pa	
		2009-2011		0.0% pa	
		2011-2016		0.8% pa	
		2016-2021		0.9% pa	
		2021-2026		0.9% pa	
ZONE	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	29,103	29,702	32,572	35,832	38,776
2	83,960	89,904	106,376	121,393	133,086
3	29,528	31,071	36,191	41,113	45,269
4	18,707	19,080	20,927	23,005	25,186
5	16,897	16,977	18,309	20,069	21,775
6	21,965	22,020	23,535	25,475	27,465
7	26,694	26,647	28,125	30,203	32,261
8	30,687	30,953	33,039	35,902	38,678
TOTAL	226,854	235,401	266,035	297,089	323,819

Source: Tables 1 & 2

LEVENSHULME INDEPENDENT STUDY

RETAIL STUDY OCTOBER 2009

LEAKAGE / CLAW-BACK

TABLE 4
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE (MAIN FOOD SPEND)

Catchment Zone	ASDA LONGSIGHT					SAINSBURY'S FALLOWFIELD					TESCO BURNAGE LANE					MORRISONS STOCKPORT					TESCO EAST DIDSBURY				
	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	8.2	8.2	8.2	8.2	8.2	2.2	2.2	2.2	2.2	2.2	9.6	9.6	9.6	9.6	9.6	2.5	2.5	2.5	2.5	2.5	0.6	0.6	0.6	0.6	0.6
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	1.7	1.7	1.7	1.7	1.7	0.1	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	1.4	1.4	1.4	1.4	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.6	0.6	0.6	0.6	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	24.9	24.9	24.9	24.9	24.9	0.0	0.0	0.0	0.0	0.0
7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.9	3.9	3.9	3.9	3.9	8.9	8.9	8.9	8.9	8.9	1.1	1.1	1.1	1.1	1.1
8	0.2	0.2	0.2	0.2	0.2	0.3	0.3	0.3	0.3	0.3	2.6	2.6	2.6	2.6	2.6	0.0	0.0	0.0	0.0	0.0	1.1	1.1	1.1	1.1	1.1

	TESCO GORTON					ASDA SPORT CITY					TESCO STOCKPORT					SAINSBURY'S DENTON					OTHER					TOTAL				
	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
	2.2	2.2	2.2	2.2	2.2	2.7	2.7	2.7	2.7	2.7	2.8	2.8	2.8	2.8	2.8	0.0	0.0	0.0	0.0	0.0	10.9	10.9	10.9	10.9	10.9	41.7	41.7	41.7	41.7	41.7
	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
	0.4	0.4	0.4	0.4	0.4	0.5	0.5	0.5	0.5	0.5	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.1	0.6	0.6	0.6	0.6	0.6	3.5	3.5	3.5	3.5	3.5
	3.2	3.2	3.2	3.2	3.2	1.2	1.2	1.2	1.2	1.2	0.0	0.0	0.0	0.0	0.0	0.9	0.9	0.9	0.9	0.9	2.8	2.8	2.8	2.8	2.8	10.2	10.2	10.2	10.2	10.2
	3.0	3.0	3.0	3.0	3.0	0.0	0.0	0.0	0.0	0.0	2.3	2.3	2.3	2.3	2.3	8.3	8.3	8.3	8.3	8.3	10.5	10.5	10.5	10.5	10.5	49.0	49.0	49.0	49.0	49.0
	0.5	0.5	0.5	0.5	0.5	0.0	0.0	0.0	0.0	0.0	4.7	4.7	4.7	4.7	4.7	1.4	1.4	1.4	1.4	1.4	14.5	14.5	14.5	14.5	14.5	35.0	35.0	35.0	35.0	35.0
	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.1	0.4	0.4	0.4	0.4	0.4	0.0	0.0	0.0	0.0	0.0	2.2	2.2	2.2	2.2	2.2	6.9	6.9	6.9	6.9	6.9

SOURCE: Household Survey

TABLE 5
CONVENIENCE GOODS ALLOCATION - SPEND (£) 2007 PRICES

Catchment Zone	ASDA LONGSIGHT					SAINSBURY'S FALLOWFIELD					TESCO BURNAGE LANE					MORRISONS STOCKPORT					TESCO EAST DIDSBURY				
	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	2,381	2,430	2,665	2,932	3,173	627	640	702	773	836	2,795	2,853	3,128	3,441	3,724	742	757	830	913	988	185	189	207	228	247
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	316	322	353	388	425	20	21	23	25	27	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	234	235	254	278	302	0	0	0	0	0	0	0	0	0	0	105	105	113	124	135	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	5,467	5,481	5,858	6,341	6,837	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	1,037	1,035	1,093	1,173	1,253	2,364	2,360	2,490	2,674	2,857	299	298	315	338	361
8	58	59	62	68	73	95	95	102	111	119	788	795	849	922	994	0	0	0	0	0	333	336	358	390	420
TOTALS	2,989	3,046	3,335	3,666	3,973	742	756	827	908	982	4,620	4,683	5,070	5,537	5,971	8,677	8,703	9,292	10,053	10,816	817	823	881	956	1,028

	TESCO GORTON					ASDA SPORT CITY					TESCO STOCKPORT					SAINSBURY'S DENTON					OTHER					TOTAL				
	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
	627	640	702	773	836	784	800	878	966	1,045	813	830	910	1,001	1,083	0	0	0	0	0	3,180	3,245	3,559	3,916	4,237	12,136	12,385	13,582	14,942	16,169
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	82	84	92	101	111	91	93	102	112	123	0	0	0	0	0	20	21	23	25	27	116	119	130	144	157	646	659	722	795	870
	548	551	594	651	707	209	210	227	249	270	0	0	0	0	0	156	157	169	185	201	468	470	508	556	604	1,721	1,729	1,865	2,044	2,218
	667	669	715	774	834	0	0	0	0	0	495	496	530	574	619	1,819	1,823	1,949	2,110	2,274	2,314	2,320	2,479	2,684	2,893	10,763	10,790	11,532	12,482	13,458
	131	131	138	148	158	0	0	0	0	0	1,252	1,250	1,319	1,417	1,513	383	382	404	433	463	3,877	3,871	4,085	4,387	4,686	9,343	9,327	9,843	10,571	11,292
	0	0	0	0	0	21	22	23	25	27	137	139	148	161	173	0	0	0	0	0	679	685	730	794	855	2,111	2,130	2,273	2,471	2,661
2,056	2,075	2,241	2,447	2,646	1,106	1,125	1,230	1,351	1,464	2,697	2,714	2,907	3,152	3,388	2,378	2,383	2,544	2,753	2,966	10,634	10,710	11,491	12,480	13,433	36,719	37,020	39,818	43,305	46,668	

SOURCE: Tables 3 & 4

LEVENSHULME INDEPENDENT STUDY
RETAIL STUDY OCTOBER 2009
 LEAKAGE / CLAW-BACK

Table 6
Leakage from Core Catchment - Main Food

Leakage from Core Catchment (Main Food Shopping)					
Zone	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	12,136	12,385	13,582	14,942	16,169
2	0	0	0	0	0
3	0	0	0	0	0
4	646	659	722	795	870
5	1,721	1,729	1,865	2,044	2,218
6	10,763	10,790	11,532	12,482	13,458
7	9,343	9,327	9,843	10,571	11,292
8	2,111	2,130	2,273	2,471	2,661
TOTALS	36,719	37,020	39,818	43,305	46,668

LEVENSHULME INDEPENDENT STUDY

RETAIL STUDY OCTOBER 2009

LEAKAGE / CLAW-BACK

TABLE 7

CONVENIENCE GOODS ALLOCATION - % MARKET SHARE (TOP-UP FOOD SPEND)

Catchment Zone	SAINSBURY'S FALLOWFIELD					STORES IN NORTHENDEN					ASDA LONGSIGHT					TESCO BURNAGE					STORES IN WITHINGTON				
	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	1.2	1.2	1.2	1.2	1.2	0.3	0.3	0.3	0.3	0.3	0.6	0.6	0.6	0.6	0.6	0.8	0.8	0.8	0.8	0.8	0.0	0.0	0.0	0.0	0.0
2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
4	0.0	0.0	0.0	0.0	0.0	0.3	0.3	0.3	0.3	0.3	0.2	0.2	0.2	0.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
5	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.2	0.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.6	0.6	0.6	0.6	0.0	0.0	0.0	0.0	0.0
8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.4	0.4	0.4	0.4	0.0	0.0	0.0	0.0	0.0

TESCO GORTON					MORRISONS STOCKPORT					STORES IN BURNAGE					SOMERFIELD HEATON MOOR					OTHER					TOTAL				
2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026
(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	1.4	1.4	1.4	1.4	1.4	0.0	0.0	0.0	0.0	0.0	4.8	4.8	4.8	4.8	4.0	9.7	9.7	9.7	9.7	9.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
0.1	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.3	0.3	0.3	0.3	1.0	1.0	1.0	1.0	0.9
1.0	1.0	1.0	1.0	1.0	0.1	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	1.5	1.5	1.5	1.3	3.0	2.9	2.9	2.9	2.7
0.0	0.0	0.0	0.0	0.0	4.4	4.4	4.4	4.4	4.4	0.3	0.3	0.3	0.3	0.3	0.0	0.0	0.0	0.0	0.0	9.3	9.3	9.3	9.3	8.0	14.0	14.0	14.0	12.7	12.7
0.0	0.0	0.0	0.0	0.0	0.4	0.4	0.4	0.4	0.4	0.0	0.0	0.0	0.0	0.0	1.8	1.8	1.8	1.8	1.8	7.2	7.2	7.2	7.2	6.3	10.0	10.0	10.0	10.0	9.1
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.3	0.3	0.3	0.3	0.1	0.1	0.1	0.1	0.1	1.1	1.1	1.1	1.1	0.9	2.0	2.0	2.0	2.0	1.8

SOURCE: Household Survey

TABLE 8

CONVENIENCE GOODS ALLOCATION - SPEND (£) 2007 PRICES

Catchment Zone	SAINSBURY'S FALLOWFIELD					STORES IN NORTHENDEN					ASDA LONGSIGHT					TESCO BURNAGE					STORES IN WITHINGTON				
	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026
	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	342	349	383	421	456	81	83	91	100	109	179	183	201	221	239	244	249	274	301	326	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	56	57	62	68	75	42	43	47	52	57	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	11	11	12	13	14	42	42	46	50	54	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	168	168	177	190	203	0	0	0	0	0
8	14	14	15	17	18	14	14	15	17	18	0	0	0	0	0	132	133	142	154	166	0	0	0	0	0
TOTALS	356	364	398	438	474	162	165	180	198	215	264	268	294	323	350	545	550	593	646	695	0	0	0	0	0

TESCO GORTON					MORRISONS STOCKPORT					STORES IN BURNAGE					SOMERFIELD HEATON MOOR					OTHER					TOTAL				
2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026
(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
98	100	109	120	130	81	83	91	100	109	407	416	456	502	543	0	0	0	0	0	1,402	1,430	1,569	1,725	1,569	2,836	2,894	3,174	3,491	3,480
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
23	23	26	28	31	4	4	4	4	5	0	0	0	0	0	0	0	0	0	0	63	64	70	77	70	187	190	209	230	238
169	170	183	200	218	21	21	23	25	27	0	0	0	0	0	0	0	0	0	0	262	255	275	301	275	505	499	538	590	588
0	0	0	0	0	956	959	1,025	1,109	1,196	68	68	72	78	85	0	0	0	0	0	2,051	2,056	2,198	2,378	2,198	3,075	3,082	3,295	3,566	3,478
0	0	0	0	0	101	101	107	115	123	0	0	0	0	0	470	469	495	532	568	1,930	1,927	2,034	2,183	2,034	2,670	2,665	2,813	3,020	2,927
0	0	0	0	0	0	0	0	0	0	85	86	92	100	108	35	35	38	41	44	334	336	359	390	359	614	619	661	718	712
289	293	318	349	379	1,164	1,168	1,250	1,354	1,459	560	570	620	680	735	505	504	533	572	612	6,042	6,067	6,504	7,056	6,504	9,887	9,949	10,689	11,615	11,423

SOURCE: Tables 3 & 4

OTHER STORES includes market shares for the following:

LEVENSHULME INDEPENDENT STUDY
RETAIL STUDY OCTOBER 2009
 LEAKAGE / CLAW-BACK

Table 9
Leakage from Core Catchment - Top Up

Leakage from Core Catchment (Top-Up Shopping)					
Zone	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	2,836	2,894	3,174	3,491	3,480
2	0	0	0	0	0
3	0	0	0	0	0
4	187	190	209	230	238
5	505	499	538	590	588
6	3,075	3,082	3,295	3,566	3,478
7	2,670	2,665	2,813	3,020	2,927
8	614	619	661	718	712
Totals	9,887	9,949	10,689	11,615	11,423

LEVENSHULME INDEPENDENT STUDY

RETAIL STUDY OCTOBER 2009

LEAKAGE / CLAW-BACK

Table 10

Floorspace Capacity form Clawed-Back Expenditure

Future floorspace capacity in Levenshulme through Claw-back of Expenditure.					
	2009	2011	2016	2021	2026
Main Food Shopping (000s)	36,719	37,020	39,818	43,305	46,668
Top-Up Shopping (000s)	9,887	9,949	10,689	11,615	11,423
Total Leakage (000s)	46,606	46,969	50,507	54,920	58,091