



**MANCHESTER CITY COUNCIL  
INDEPENDENT RETAILERS STUDY:  
CHEETHAM HILL**

October 2009

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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 Cheetham Hill 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 Cheetham Hill and providing an up-to-date picture of current and future retail capacity in the centre. This study also examines a range of planning measures in order to support the independent sector in Cheetham Hill going forward through the LDF period.
- 1.2 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.
- 1.3 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 Cheetham Hill;
  - an up-to-date and realistic assessment of the quantitative and qualitative scope for new retail and other development within Cheetham Hill, and views on the appropriateness of alternative types of retail development including new 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 Cheetham Hill.
  - 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 Cheetham Hill's catchment area.
- 1.4 In order to produce a comprehensive up-to-date review of retailing needs in Cheetham Hill we have drawn on a household telephone survey, an in-centre survey and a survey of businesses in Cheetham Hill. The quantitative capacity exercise draws on the household telephone survey results to establish the current performance of Cheetham Hill 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**

- 1.5 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 Cheetham Hill District Centre. Section 3 highlights current retail trends, focusing on the likely implications for retailing within the city's district centres.
- 1.6 In Section 4 we present our qualitative assessment of Cheetham Hill 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 Cheetham Hill. In Section 6 we review the findings of our study and consider the strategic options for the future development of Cheetham Hill 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 policies 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, Cheetham Hill 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 2 comprises Cheetham Hill and Crumpsall which combine to form an area with its own identity within the city, separated from other areas to the north and east. Policies are geared towards protecting and improving Cheetham Hill as a District Centre. Policy CC17 of the UDP states that Manchester City Council in partnership with Salford City Council and the private sector will improve and further develop Cheetham Hill District Centre, "*particular emphasis will be given to improving safety, environmental quality and economic activity.*" This policy was devised to consolidate Cheetham Hill's role in the sub-regional retail network.
- 2.35 Policy CC19 states that proposals for commercial/retail/leisure uses at St Luke's Church/Temple Cinema site will be favourably received provided that the listed structures are retained and that the special character of the site is conserved, to ensure the economic reuse of important buildings and in the interests of conservation.

### 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 flowing areas are of relevance: the City Centre Regeneration Area and the North Manchester Regeneration Area which has a population of some 86,000 people and incorporates Cheetham Hill and Harpurhey, these are the only two district centres in the North Manchester. Cheetham is described as ethnically diverse, with more sustainable communities than the east side of North Manchester, closer to the city centre, but still deprived by most standards. Section 7.19 specifically states that development will be supported in the district centres of Cheetham and Harpurhey.

- 2.38 Radial transport routes into the city are good including the northern section of the Metrolink, however linkages to east Manchester are less frequent, the key issue identified for North Manchester therefore is to provide and maintain good linkages to the employment opportunities in both the City Centre and East Manchester, particularly Central Park to improve the access to employment hubs.
- 2.39 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.
- 2.40 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. Cheetham Hill is described as one of the few district centres that provides a comparison goods function, though to a lesser extent than Chorlton and Wythenshaw.

### North Manchester Strategic Regeneration Framework (2004)

- 2.46 The North Manchester Strategic Regeneration Framework, which covers Cheetham Hill 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 framework document describes the regeneration area as being home to neighbourhoods that are confronted with an array of challenging and interrelated economic, social and physical issues, however there are many strengths and opportunities within the wider area that should be exploited in order to reposition Cheetham Hill and allow it to take full advantage of economic prosperity from the city and the wider region.
- 2.47 The framework refers to the major investment in Cheetham Hill that will create the physical opportunity to establish a more intense, mixed-use town centre. This investment has already come in the form of the Cheetham Hill Shopping Centre development that was developed by the end of 2008.
- 2.48 Unemployment in Cheetham Hill and Harpurhey are among the highest in Manchester, however both areas stand out as places where pedestrian activity is heaviest and retail activity is concentrated. According to the document there has been a significant increase in population levels in Cheetham Hill in recent years leading to a high demand for housing across all tenures as well as a higher demand for education and other public sector services. The Framework states that civic life in Cheetham Hill can be improved by mixing uses, encouraging strong retail frontages, locating active uses at street level and by promoting a high quality public realm in terms of the design and quality of lighting, street furniture, materials and planting.
- 2.49 A number of measures to progress North Manchester's image are set out in the framework document, these include:
- Celebrating and reinforcing areas of special character;
  - Creating and celebrating places of activity;
  - Creating gateways;
  - Creating and highlighting landmarks;
  - Appreciating the topography;
  - Improving the appearance of neighbourhoods;
  - Identifying innovative interim uses for vacant land;

- Pursuing a coordinated and effective marketing strategy;
- Adhering to the principles of good urban design;

## 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 Cheetham Hill. 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 Cheetham Hill 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 Quantitative 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 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.

## **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% returning to 2.0% 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 supermarkets 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 - Cheetham Hill, within the catchment of larger centres such as Manchester City 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 particularly 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. CHEETHAM HILL: HEALTH CHECK

- 4.1 This section sets out a detailed audit and health check of Cheetham Hill District Centre based on the key performance indicators set out in Chapter 4 of PPS6.

### Introduction

- 4.2 Cheetham Hill is a local convenience and service centre within to the north of Manchester city centre; it is identified as a District Centre in Manchester's Unitary Development Plan, and the functional extent of the retail area straddles the administrative boundary of Manchester and Salford City Councils. The majority of the centre is encompassed within Manchester City Council but a small portion of the north west of the retail centre falls within the Salford boundary. There are a handful of retail units beyond the designated District Centre boundary at the south of the centre, north of Halliwell Lane and Greenhill Road, and they are integrated with and functionally related to the defined retail centre.
- 4.3 In conformity with the extent of the Goad town centre survey, this health check examines the performance of the entire functioning centre, including those units within the Salford Council boundary and the aforementioned units that are just outside the designated district centre boundary.
- 4.4 Cheetham Hill is a linear shopping street focussed on Bury Old Road, which runs in a north-south direction and accommodates small, densely packed retail units; however, there are some gaps in the retail frontage where residential buildings interrupt the active street frontage, although this generally confined to the south of the centre. The catchment population of Cheetham Hill is ethnically diverse and the centre's shopping offer reflects this diversity in its range of foodstores and services which cater to different ethnic groups and market segments. This diverse range includes retailers such as the Worldwide foodstore and the Kashmir Mart, which appeared popular stores on the day of the site visit.
- 4.5 The new Cheetham Hill Shopping Centre is a small recently constructed shopping centre just south of Thomas Street, on the east side of Bury Old Road, from which it takes its access. A new Tesco store anchors the scheme which includes 25 smaller shops units, five of these units are already let to retailers including Costa Coffee, Peacocks clothing, Heron Foods, Cash Generator (pawn shop) and Ladbrokes. According to the agents, a further ten units are under offer. The scheme creates a pleasant pedestrianised shopping environment with large shop windows and a uniformity of streetscape.

### Diversity of Uses and Retailer Representation

- 4.6 Experian Goad surveyed the centre in April 2009 and established the concentration 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.).

4.7 The Experian Category Report identifies 151 retail units within the survey area, comprising approximately 34,736 sqm of gross retail floorspace. The survey indicates that the split between the different retail categories in terms of unit numbers in Cheetham Hill is broadly in line with the UK average. Service uses are dominant in Cheetham Hill, compared with units in the comparison shopping sector which is not surprising given its District Centre designation (See table 4.1 & 4.2 below).

**Table 4.1: Cheetham Hill Retail Composition – Unit Count by Use Category**

<b>Cheetham Hill District Centre Retail Composition: Unit Count by Use Category</b>				
<b>Retail Category</b>	<b>No. of Units</b>	<b>% of Total</b>	<b>UK Average (%)</b>	<b>Variance</b>
Comparison	41	27.15	34.49	-7.33
Convenience	18	11.92	8.83	3.09
Service	75	49.67	45.76	3.91
Vacant	15	9.93	10.75	-0.81
Miscellaneous	2	1.32	0.17	1.15
<b>Total</b>	<b>151</b>	<b>100</b>	<b>100</b>	

*Source: Experian Category Report, (April 2009)*

**Table 4.2: Cheetham Hill Retail Composition – Floorspace by Use Category**

<b>Cheetham Hill District Centre Retail Composition: Floorspace by Use Category</b>				
<b>Retail Category</b>	<b>Floorspace (sqm)</b>	<b>% of Total</b>	<b>UK Average (%)</b>	<b>Variance</b>
Comparison	7,005	20.17	37.86	-17.70
Convenience	12,040	34.66	14.34	20.32
Service	8,984	25.86	38.63	-12.77
Vacant	6,568	18.91	9.05	9.86
Miscellaneous	139	0.40	0.11	0.29
<b>Total</b>	<b>34,736</b>	<b>100</b>	<b>100</b>	<b>0.00</b>

*Source: Experian Category Report, (April 2009)*

## Comparison Shopping

- 4.8 With 41 units composing 27.2% of the overall unit count, comparison shopping in Cheetham Hill is less than the national average of 34.5% with most of this comparison provision comprising independent retailers (31 units composing 75.6% of all comparison units). At the time of the recent Experian survey (April 2009) there were seven clothes shops, five of which were independent retailers. There were five hardware/household goods shops, four of which were independent; the only florists in Cheetham Hill is an independent retailer, and all five of the electrical retailers are independently run. All five of the charity shops in the centre are multiple retailers.
- 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 town/district centre. In Cheetham Hill multiple retailers compose only 19.9% of the overall unit count (independents make up 70.2% while 9.9% are vacant), and very few of these are comparison retailers. Multiple operators include such high street names as Peacocks clothing, Boots the Chemist and array of charity shops including All Aboard, Age Concern and Scope. There are very few well known high street retailers; conversely independent retailing in Cheetham Hill is very strong.

## Convenience Shopping

- 4.10 With 18 units, composing 11.9% of the overall unit count, convenience shopping is better represented when compared with the national average of 8.8%. Just over three quarters of these convenience units are considered independent retailers and these include one baker, two butchers, one newsagent, two convenience stores, one fishmonger, four grocers/delicatessens, one health food shop, one off licence and one independent supermarket.
- 4.11 Convenience floorspace on the other hand is more dominant with 12,040 sqm composing 34.7% of all floorspace with is far in excess of (more than double) the national average of 14.3%. This is due to the recent opening of a large Tesco store to the east of Cheetham Hill Shopping Centre measuring approximately 7,460 sqm (gross). There are only two multiple convenience operators in the centre including Iceland and the recently opened Tesco.

## Service Provision

- 4.12 With 75 units making up 49.7% of all units the service provision in Cheetham Hill is slightly above the national average of 45.8%. The proportion of service floorspace is also below the national average with 8,984 sqm (gross) composing 25.9% of all floorspace in the district centre compared with the national average of 38.6%. According to Goad 78.7% of all service units are independently run, and most of these are in the leisure service category including three café's, four restaurants and thirteen fast food takeaways. Multiple operators include Costa Coffee and national banking establishments such as Abbey Bank, Natwest, Lloyds TSB, Halifax, RBS and HSBC.

## Vacant Property

- 4.13 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 just below national average figures with 15 units making up 9.9% of the overall unit count compared with the national average vacancy rate of 10.8%. This is encouraging and suggests that Cheetham Hill is performing well and that there is a reasonable retailer demand for the take-up of available units within the district centre, as discussed below. Despite the fact that the number of vacant units is below that of the national average, when it comes to the quantum of vacant floorspace it is evident that the level of vacancy at 6,568 sqm (18.9%) is double that of the national average, 9.1%.
- 4.14 Overall, it is therefore apparent that In terms of unit numbers Cheetham Hill has a large proportion of service uses, particularly in the A3 and A5 use class category, and that comparison shopping is less well represented, In terms of floorspace, the proportion of floorspace in the convenience category is very high while its provision of comparison and service floorspace is lower than average. The proportion of vacant floorspace in the centre is also above the national average.

## Retailer Demand

- 4.15 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 are currently only two requirements for premises in Cheetham Hill on behalf of Superdrug and Appna Continental Cash & Carry who are seeking units of between 1,115 sqm and 4,274 sqm in total. This indicates that the district centre is not a priority location for retailers to set up operations at present. This low retail demand could be in part due to the current economic crisis which has reduced retailer demand across the country. Notwithstanding, a low level of retailer demand would be expected for a centre such as Cheetham Hill due to its localised shopping role and relatively small catchment population.

## Physical Environment

- 4.16 Cheetham Hill is characterised by the low, predominantly two and three-storey buildings that line Bury Old Road, with retail uses at street level and generally office/storage/residential uses above. Bury Old Road was heavily trafficked which can restrict movement and cause problems for shoppers due to the two way road network.
- 4.17 Some of the streetscape comprises fine building stock of solid red-brick construction with neighbouring buildings varying in heights and design. This creates an interesting streetscape that has no uniformity building height, styling or design. The standard of shop fronts varies throughout the centre with the quality of these decreasing towards the south of centre.

- 4.18 The footpaths in the centre are of varying widths becoming quite wide in places and creating a more pedestrian friendly environment. The paving is of high quality in parts of the centre, and some care has gone into the street furniture such as granite bollards/benches at the road side which serve to separate the vehicular traffic from the pedestrian area, and prevent cars from mounting the curb and encroaching on the pedestrian space. There is a degree of tree planning along the main street which softens the urban landscape.
- 4.19 We consider that improvements could be made to certain shops fronts in the centre and that the issue of congestion is considered, possibly with traffic calming measures.

## **Accessibility and Parking Provision**

- 4.20 As discussed above Bury Old Road is heavily congested which makes the centre appear quite car-dominated. There is some on-street parking along the main street outside the new Cheetham Hill Shopping Centre, and at the south of the centre on the east side of the road. There is a car park accommodating approximately 80 spaces in front of the Worldwide supermarket off Crescent Road. There is another car park (83 spaces approximately) behind the Iceland store, to the south of the new Tesco store, it also takes its access of Crescent Road. By far the largest car park however, is in front of the Tesco store with capacity for 400 cars. This surface car park is accessed via Thomas Street off Bury Old Road. On the Western side of Bury Old Road there is a car park providing 70 spaces that is accessed from George Street.
- 4.21 There are numerous bus routes that serve the centre including 51A, 52, 53, 59, 88, 89, 135, 137, 138, 149, 151, 154, 167, 294 and X35. These routes connect Cheetham Hill to the wider retail network and serve destinations such as Manchester City Centre, the Trafford Centre, Oldham, Pendleton, Rushcroft, Blackley, Altrincham, Bury, Chadderton, Norden and Langley, among many others. In terms of railway transport, Crumpsall Station is within walking distance of the centre and is located approximately 700 metres from the centre to the east.

## **Customer/Business Views and Behaviour**

### **In-Centre Survey Results**

- 4.22 In order to understand the views and behaviours of visitors to Cheetham Hill, an in-centre survey was conducted in the centre in July 2009. In total, 101 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*

- 4.23 Of the 101 people who took part in the In-Centre survey 81.2% classed themselves as shoppers and 7.9% considered themselves visitors/day-trippers (Table 4.3). 65.3% stated that the main purpose of their visit was food shopping, whilst 5% came to Cheetham Hill for non-food shopping (clothing, footwear, soft furnishings or electrical goods) and nearly 6% for financial services (Table 4.4). Of the 65.3% of people who visited for food

shopping, 63.4% of this specific food shopping group said they were visiting Tesco, 42.3% were visiting Iceland, 14.1% were visiting Heron and 4.2% were undecided (Table 4.5)

**Table 4.3: Visitor Categories**

Shopper	Day Tripper	Worker	Student
81.2%	7.9%	3%	3%

**Table 4.4: Main Purpose of Visit**

Food Shopping	Financial Services	Non-Food Shopping	Visiting Friends or Relatives
65.3%	5.9%	5%	4%

**Table 4.5: Foodstores visited (of those who answered "food shopping in table 4.4 above)**

Tesco	Iceland	Heron (Frozen Foods)	Kashmir Mart	Ethel Austin
63.4%	42.3%	14.1%	4.2%	4.2%

### *Why Cheetham Hill?*

- 4.24 Respondents were asked why they chose Cheetham Hill over other District Centres, 77.2% cited reasons of convenience such as the centre being close to home, work, or friends and family. 3% of respondents chose Cheetham Hill because it had a good range of shops and services, while another 2% credited Cheetham Hill's good range of food and drink outlets (Table 4.6).

**Table 4.6: Reasons for Choosing Cheetham Hill**

Convenient Location	Good Public Transport	Good Range of Shops and Services	Good Range of Food & Drink Outlets
77.2%	5%	3%	2%

### *Mode of Transport*

- 4.25 Just over half of respondents (56.4%) interviewed walked to the centre, while 20.8% came by car. A further 16.8% came by bus and 1% cycled.

### *Frequency of Visitation*

- 4.26 When asked how often they visited the centre for shopping purposes 86.1% said they visited at least once a week and almost a third of those people claimed they come to shop in Cheetham Hill almost every day (Table

4.7). Not surprisingly, 78.2 % of respondents said they never do late night shopping in Cheetham Hill and 15.8% said they did late night shopping once a month or more often (Table 4.8).

4.27 Of the people interviewed 8.9% of people said they come to Cheetham Hill at least once a week for the purposes of eating or drinking, while 78.2% claimed they never visited Cheetham Hill during the day for this purpose (Table 4.9). The results for visiting the centre at night time for eating and drinking were similar although only 8% claimed they came once a week or more frequently and 85.1% said they never visited at night for those purposes (Table 4.9).

**Table 4.7: How Often Respondents Visit Cheetham Hill for Shopping (During the Day)**

Every Day	2 or 3 Times a Week	Once a Week	Once a Fortnight	Once a Month	Never
29.7%	40.6%	15.8%	1%	3%	3%

**Table 4.8: How Often Respondents Visit Cheetham Hill for Late Night Shopping**

Every Day	2 or 3 Times a Week	Once a Week	Once a Fortnight	Once a Month	Never
0%	5.9%	6.9%	2%	1%	78.2%

**Table 4.9: How Often Respondents Visit Cheetham Hill 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
0%	6.9%	2%	5%	1%	78.2%

**Table 4.10: How Often Respondents Visit Cheetham Hill for Late Night Eating and Drinking**

Every Day	2 or 3 Times a Week	Once a Week	Once a Fortnight	Once a Month	Never
0%	5%	3%	1%	0%	85.1%

### *Independent Retailers*

4.28 When people were asked if they ever visited local independent shops only 32.3% responded positively. Of this group of people 1.4% said they visit independents on a daily basis. 8.1% said they visit such retailers two or three times a week, and 27% said they do so weekly. 28.6% visit independents on a monthly basis and 8.9% said they visit such shops every 2 or three months.

**Table 4.11: How Often Respondents Visit Independents (of those who shop in Independents)**

Every Day	2 or 3 Times a Week	Once a Week	Once a Fortnight	Once a Month	2-6 Months	Less than 6 months
1.4%	8.1%	27.3%	13%	28.6%	10.6	2.8

### *Likes and Dislikes*

- 4.29 When asked to name any number of things they liked about Cheetham Hill 74.4% of respondents cited its convenient location or its accessibility among other things. Just under 7.0% of people made some mention of the good range of independent stores (Table 4.12). When these people who liked the range of independents were asked what it was they liked about such stores 14.3% said they preferred the ethics of the local independent shopping model, while the remaining 85.7% of people could not identify what it was they liked about independent stores.

**Table 4.12: What Respondents Like about Cheetham Hill (Any Mention)**

Convenient Location	Good Range of Independent Shops	Friendly Atmosphere	Nothing
74.4%	6.9%	6.9%	7.9%

- 4.30 When asked what they disliked about Cheetham Hill 45.5% of people said there was nothing or very little that they did not like, however 13.9% said they disliked the poor level of security for shoppers and cars in the District Centre. A further 5.9% said it was either difficult or expensive to park, 4% cited traffic congestion as their major complaint and 8.9% of people said there were too many vacant shops. Interestingly, only 6.9% of people bemoaned the lack of non-food stores while 2% claimed there was a lack of foodstores. Whilst, 5% cited the centre's poor environment or litter (Table 4.13).

**Table 4.13: What Respondents Dislike about Cheetham Hill**

Poor Security	Vacancy Level	Lack of Non-Food Stores	Difficult or Expensive to Park	Poor Environment	Nothing
13.9%	8.9%	6.9%	5.9%	5%	45.5%

### *Competing Centres*

- 4.31 Respondents were asked where they mainly shopped for clothing, footwear and other non-food shopping; only 11.9% cited Cheetham Hill, while 55.4% unsurprisingly said Manchester City Centre and 5.9% said they shop in Harpurhey. Interestingly, Bury, Central Retail Park and the Trafford Centre accounted for 5%, 4% and 4% of responses respectively (Table 4.14)

**Table 4.14: Main Choice for Clothing, Footwear and Other Non-Food Shopping**

Manchester	Cheetham Hill	Harpurhey	Bury	Central Retail Park	Manchester Fort Shopping Centre
55.4%	11.9%	5.9%	5%	4%	3%

## Business Survey Results

- 4.32 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 Cheetham Hill District Centre 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 the centre's retailers; we were only able to secure 19 responses. The survey was designed to gain a deeper understanding of the composition and profile of Cheetham Hill's shops and services, as well as to gauge operators' opinions about 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.

### *Duration of Trading and Future Plans*

- 4.33 Of all the businesses surveyed 52.6% have been trading in Cheetham Hill for over ten years; most of those have remained in the same premises during that time. Only 10.5% respondents began trading in Cheetham Hill within the last two years. When asked if their current premises satisfied their needs in terms of location, 84.2% replied positively. There was 100% satisfaction recorded for respondents with respect to the size and format of their stores. This investigation reveals that the majority of independent traders in Cheetham Hill are well established (Table 4.15).

**Table 4.15: Duration of Trading**

< 1 Year	1-2 Years	2-3 Years	3-4 Years	4-5 Years	5-10 Years	> 10 Years
0%	10.5%	5.3%	5.3%	5.3%	21.1%	52.6%

- 4.34 When asked about their future plans for their business the majority of respondents (84.2%) declared their intentions to continue on as before or stated that they have no plans for the future. According to the survey 5.3% of operators intend to expand their operations, whilst 2 (10.5%) respondents intended to close their operations in the near future.

### *Turnover compared with Company Averages*

- 4.35 Of those operators who have more than one store in the UK, 25% claimed that their turnover was less, whilst no one claimed that it was higher than the company's national average. Half of businesses said they were trading the same while the remaining 25% said the comparison was not applicable. This indicates that overall stores in Cheetham Hill's appear to be trading at a fair performance level with some scope for improvement.

### *Car Parking Accessibility and Environment*

- 4.36 In relation to car parking, operators were asked if they felt they had appropriate car parking facilities outside their premises. Opinion was balanced on this issue with 57.9% answering in the affirmative. 26.3% of operators



surveyed are open for some period of trading on Sundays. On a scale where -1 is bad and +1 is good the mean response from the 19 operators when asked to rate the accessibility of Cheetham Hill District Centre was 0.11, which indicates that the average opinion is marginally better than “neither good nor bad”.

- 4.37 Regarding respondents’ opinions of the centre’s environmental quality, the results were slightly worse with a mean response of -0.05. 15.8% of respondents felt the environmental quality was “very bad” but no one thought it was “very good”, while 26.3% of people felt it was “bad” compared to 47.4% who felt it was “good”, 42.1% were indifferent.

### *Strengths and Weaknesses of Cheetham Hill*

- 4.38 When asked what they considered the strengths of Cheetham Hill’s retail offer, 15.8% of respondents cited the centre’s range of independent shops, and 5.3% said the range of national multiples. A further 15.8% cited the Tesco store as one of the centre’s main strength, whilst 36.8% of operators considered that Cheetham Hill had no strengths (Table 4.16).

**Table 4.16: Main Strengths in the Retail Offer of Cheetham Hill**

Range of Independents	Tesco	Niche Retailers / Boutiques	Major Multiples	Good Road network	Nothing
15.8%	15.8%	5.3%	5.3%	5.3%	36.8%

- 4.39 Conversely, when asked what Cheetham Hill’s weaknesses were in terms of its retail offer 21.1% said the poor range of retailers in general, while 47.4% cited the lack of menswear, children’s wear or ladies’ clothing and 10.5% overall bemoaned the poor range of major national multiple retailers. 15.8% complained of the poor parking facilities and 5.3% considered people drinking on the streets to be a key weakness. However, 21.1% had no complaints to make (Table 4.17).

**Table 4.17: Weaknesses in the Retail Offer of Cheetham Hill**

Lack of Clothes Shops	Poor Range of Retailers	Parking Facilities	Lack of National Major Multiples	Poor Mix of Goods Types	Nothing
47.4%	21.1%	15.8%	10.5%	10.5%	21.1%

- 4.40 Eating and drinking in the district centre during the evening time was generally perceived poorly with a mean response of -0.14 on a scale where -1 is “bad” and +1 is “good”. The response for eating during the day was more positive with a mean response of 0.28.
- 4.41 When asked what it was they liked, from their business perspective, about Cheetham Hill District Centre 21.2% cited the mix of retailers, 26.3% liked the friendly customers in the town or praised their customer loyalty. A further 5.3% cited the environment and landscaping, while 5.3% felt that the size and compactness of the centre was its best attribute.

- 4.42 Negative attributes from a business perspective were also explored and 31.6% of respondents mentioned crime, anti-social behaviour and gangs as their main grievance. Just over a quarter of businesses mentioned the problem of vacant units in the centre, while 15.8% cited poor street-cleaning, and 10.5% complained of the cost or accessibility of car parking facilities. However, 31.6% of respondents could not identify any drawbacks.

### *Issues and Opportunities*

- 4.43 The business survey probed the main issues facing Cheetham Hill and when this question was put to the local business operators 36.7% cited the loss of independent shops as the main issue. 31.6% felt that crime and security issues were of pre-eminent concern, while 15.8% thought that car parking issues were the priority (Table 4.18).

**Table 4.18: Main Issues Facing Cheetham Hill**

Loss of Independent Shops	Crime and Security	Poor Street Cleaning	Car Parking	Limited Range and Mix of Retailers	Limited Range of National Multiples
36.8%	26.3%	15.8%	10.5%	10.5%	5.3%

- 4.44 Respondents were asked how they thought Cheetham Hill should be aiming to develop itself and providing a more varied retail /service offer, 15.8% were of the opinion that Cheetham Hill should create its own niche for an independent retail offer, while 5.3% thought Cheetham Hill should try and attract more established multiple retailers. Whereas, 63.2% thought that a balance between the two approaches is the best way forward.
- 4.45 When attention was turned to the range of potential improvements to Cheetham Hill district centre, 31.6% of respondents said that a better range of shops should be catered for, 21.1% said that security should be improved and 15.8% said that better parking facilities should be provided.

## Household Telephone Survey Results

- 4.46 In order to provide detailed factual information on shopping patterns in Cheetham Hill, we commissioned a household telephone survey covering 600 households. GVA Grimley designed the survey questionnaire in consultation with the Council and NEMs market research company – who undertook interviewing and data processing. The survey area is shown on Plan 1. This has been defined by examining the interrelationship that Cheetham Hill has with other district centres in the local area and is based on a best fit of postal sectors surrounding the centre.
- 4.47 The telephone survey asked people if they ever used Cheetham Hill for their shopping or service needs and the results revealed that 53.3% did use the centre for such purposes. Of these 58.5% of respondents claimed that they chose Cheetham Hill for reasons of its convenience location in relation to their home, their work or their friends and family. A further 20.5% chose Cheetham Hill because it has a good range of shops and services or food and drink.

- 4.48 This same group were asked what they use Cheetham Hill for, and the majority of respondents (52.1%) cited non-food shopping, 26.9% said small scale or top-up food shopping, and 38.1% said they used Cheetham Hill for their main food shopping. 23.9% of people who use Cheetham Hill make use of its financial services, and only 2.5% mentioned that they use the cafes, restaurants or fast food outlets. 2.5% of the respondents said they used personal services in Cheetham Hill such as hairdressers and laundrette services for example.
- 4.49 When those people who visit Cheetham Hill were asked what they liked about Cheetham Hill the highest rated response was the town's convenient location in relation to home or work (27.4%). 15.5% of respondents cited the centre's good range of chain stores and 12.4% liked the range of independent stores. 31.1% liked nothing about Cheetham Hill. This is in contrast to the 57.7% of respondents who said there was nothing they disliked about Cheetham Hill. However, 19.2% of respondents felt that the centre was too unsafe, that security was inadequate or that it had an unpleasant environment. 8.6% felt that it was too difficult or too expensive to park and 5.9% thought the traffic congestion was sufficient reason to dislike the town.
- 4.50 We asked people if they ever did any of their food or grocery shopping in local independent stores, and only 34.3% of respondents said that they do shop in independents. We asked this 34.3% what it was they liked about shopping in independent stores for their food and groceries, 43.1% of respondents said that visiting such stores was more convenient or was closer to their home or bus stops. 29.8% felt that there was a better quality of produce on offer in local stores and 25.5% said that they liked the friendly service. 12% of respondents said that they were able to find more interesting products on offer, and 11% of people said that items were generally cheaper in local stores. 5% of people liked the idea of supporting the local economy.
- 4.51 The 65.7% 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, 30.6% of them said that independents were too expensive, and 21.2% said that there were not enough independent stores nearby. 14.4% said that there was not enough choice in local shops and 13.1% said that local independents were not big enough to get enough items under one roof. 17.6% said there was no particular reason why they chose not to shop in independents. We have summarised the key differences between people who use independent food shops and those that do not, below in Table 4.19.

**Table 4.19: Independent Store Usage (Food Shopping)**

Shop in Independents (Food Shopping) 34.3%	Do Not Shop in Independents (Food-Shopping) 65.7%
<b>Reasons for using independents</b> <ul style="list-style-type: none"> <li>• More convenient (43.1%)</li> <li>• Better quality (29.8%)</li> <li>• More Friendly (25.5%)</li> <li>• Different / interesting Items (12%)</li> <li>• Cheaper Items (11%)</li> <li>• Support local economy (5%)</li> <li>• No reason / don't know (2.9%)</li> </ul>	<b>Reasons for not using independents</b> <ul style="list-style-type: none"> <li>• Too expensive (30.6%)</li> <li>• Not enough local stores (21.2%)</li> <li>• Not enough choice (14.4%)</li> <li>• Not enough items under one roof (13.1%)</li> <li>• Less convenient (6.4%)</li> <li>• No reason / don't know (17.8%)</li> </ul>

Source: Household Telephone Survey Q05/06

- 4.52 Those people who shop in local independents for their food-shopping were asked how frequently they visit them: 14.8% of people do so daily while 35.4% visit independents two or three times a week. 35.8% make a weekly trip to local stores and 6.6% shop there fortnightly. 3.6% of people visit independents just once a month and 1.3% visit them every two months or less.
- 4.53 We asked people if they ever visit their local independent retailers for their non-food shopping only 20.8% 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 25.9% of respondents said that they could find items cheaper. 24.4% said they found independents to be more convenient, being closer to home, bus stops or their work. 22.9% said that they liked the friendly service of local stores, and 15% said that they could find different and interesting items.
- 4.54 The 79.2% 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, 25.5% said that there were too few local independent stores nearby, 15.9% said that items were too expensive, and 15.4% said that local stores did not offer enough choice; a further 8.4% said that local stores could not fit enough items under one roof. 33.2% of respondents said that there was no particular reason why they did not visit local independents. We have summarised the key differences between people who use independent shops and those that do not below in Table 4.20.

**Table 4.20: Independent Store Usage (Non- Food Shopping)**

Shop in Independent Stores 20.8%	Do Not Shop in Independent Stores 79.2%
<b>Reasons for using independents</b> <ul style="list-style-type: none"> <li>Cheaper Items (25.9%)</li> <li>More convenient (24.4%)</li> <li>More friendly service (22.9%)</li> <li>More interesting items (15%)</li> <li>Good range of goods (6.6%)</li> <li>Support of local economy (6.1%)</li> <li>Better quality produce (5.6%)</li> <li>No reason / don't know (11.8%)</li> </ul>	<b>Reasons for not using independents</b> <ul style="list-style-type: none"> <li>Too few stores nearby (25.5%)</li> <li>Items too expensive (15.9%)</li> <li>Not enough choice (15.4%)</li> <li>Not enough items under one roof (8.4%)</li> <li>Supermarket is more convenient (2.2%)</li> <li>No reason / don't know (35.2%)</li> </ul>

Source: Household Telephone Survey Q14/15

- 4.55 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 a weekly 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.
- 4.56 People were asked to name up to three types of improvements that would persuade them to visit Cheetham Hill 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 Cheetham Hill 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

- 4.57 Cheetham Hill is a busy and vibrant district centre with a broad range of shops and services. There are many independent retailers represented particularly in the convenience sector, vacancy levels are below the national average and the centre appears to be performing well and has recently benefited from recent investment in the form of a new Tesco and new shopping centre.
- 4.58 From reviewing the results of the telephone survey, in-centre survey and the business survey we can build a reliable picture of customer and retailer opinions and views. Most of the people who visit Cheetham Hill are there to shop, and most come for the purpose of their food shopping. Of these people the majority intend to visiting Tesco and Iceland which appear to be the main shopping destinations. Most people who visit Cheetham Hill see to do so frequently, though mostly during the day, with the centre's evening economy proving less of a draw. The results also indicate that people mostly choose to visit Cheetham Hill over other centres because of its convenient location in terms of its proximity to people's work, home, or friends and family.
- 4.59 The results of the telephone survey reveal that a low percentage of people tend to shop in local independent stores in general. 34.3% of respondents visit independent retailers for their food and grocery shopping, and only 20.8% of people visit independents for their non-food shopping, and the majority of people in both instances shop locally for reasons of convenience or because they perceive the quality of the goods to be superior. Local independents are also perceived to offer a friendlier service that these shoppers like. Those people who choose to shop in independent stores tend to do so regularly, especially where food shopping is concerned, with 86% and 43.1% of these shoppers visiting independents once a week or more often for their food and non-food shopping respectively.
- 4.60 Our research has investigated the main issues that Cheetham Hill faces. Shoppers and retailers alike seem to agree that anti-social behaviour, security and the perception of crime in the centre are two of the biggest issues facing Cheetham Hill. Traffic congestion and the cost and availability of car parking were also identified by retailers and shoppers alike as pertinent problems facing the centre. The results of the surveys also highlight a number of weaknesses in the centre, these include the increasing level of vacancy in Cheetham Hill, and the lack of major multiple retailers, as well as the poor range of comparison shopping in the centre.
- 4.61 By contrast the surveys confirm the perception of the centre's independent retail offer as a key strength, and it is important that emerging policy and future development opportunities to not undermine the existing independent offer. The centre is currently vibrant and appears to be performing well, however continued investment in the quality and maintenance of the high street is necessary in order to ensure Cheetham Hill's continued vitality.

## 5. CAPACITY PROJECTIONS

- 5.1 In this section we estimate the current performance of Cheetham Hill 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 Cheetham Hill 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 Cheetham Hill 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 appropriate to a centre like Cheetham Hill 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 107,070. It is forecast to grow to 108,615 by 2011, 113,148 by 2016, to 117,957 by 2021 and finally to 121,773 by 2026 (Table 1, Appendix 1). Overall, population is forecast to grow by 13.7% between 2009 and 2026 within the whole survey area.
- 5.10 Table 5.1 highlights the social economic grade of Cheetham Hill's catchment area. It is apparent that the proportion of people in the AB category at 13.4% is below the national average (21.6%). Similarly the proportion of those residents in the C1 and C2 categories (25.8% and 13.2% respectively) are also below the

national average. By contrast there is a higher than average proportion of people in the D category (26.3%) and in the lowest social grade, the E category (23.9%).

**Table 5.1: Social Economic Grade of Survey Area**

	AB	C1	C2	D	E
Survey Area	13.44%	25.79%	13.23%	26.34%	23.9%
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 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 £159.3m. This is forecast to grow to



£160.8m by 2011, to £173.3m by 2016, to £188.9m by 2021 and finally to £203.9m by 2026, equating to an overall growth of £44.7m (28%) between 2009 and 2026 (Table 3, Appendix 1).

- 5.15 Comparison expenditure at £237.5m, is currently higher than convenience spend, and is expected to grow to £276.5m by 2016, and to £330.9m by 2021, and finally to £392.2m by 2026. This amounts to an overall growth of £154.7m (65.1%) 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

### Cheetham Hill District Centre

- 5.17 Our methodology estimates the trade draw of Cheetham Hill District Centre for convenience goods (Table 4, Appendix 1). This comprises an examination of the trade drawn to the Tesco and Iceland foodstores, as well as the combined independent convenience offer that comes under the 'Other' category. The recent development of the Tesco store at the north west of the District Centre has significantly improved Cheetham Hill's convenience goods provision; when the range of independent retailers is considered it appears that the centre has a good range and choice of convenience shopping.
- 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 new **Tesco** foodstore, which opened at the north east end of the district centre in January 2009, has a turnover of £17.9m. Based on a net convenience floorspace figure of 3,133 sqm we estimate that the store has a sales density of £5,710 per sqm. This is much lower than the Tesco company average of £10,873 per sqm. This low performance level is most likely due to the fact that the Tesco store opened only recently and has not yet reached a mature pattern 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.
  - **Iceland** opened in November 1994, has a turnover of £1.64m and with 582 sqm of net retail floorspace the frozen-foods store is trading at a sales density of £2,813 per sqm (of net retail floorspace). This is below Iceland's standard company average level (£5,726 per sqm net).

- The **Worldwide** Foodstore to the south of the new Tesco store is located to the east of Bury Old Road and takes its access off Crescent Road. Surprisingly the store did not register any market shares from the telephone survey despite the fact the store appeared busy on the day of the site visit. We have therefore not attributed any specific turnover and have assumed that the foodstore comes under the “other foodstores” category.

- 5.19 We advise that the baseline turnover estimates for Cheetham Hill'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 Tesco and Iceland would be trading at a higher level than the telephone survey is currently estimating.
- 5.20 In relation to the smaller independent shops in Cheetham Hill, we have examined the market shares going to individual stores and independent shops in Cheetham 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 £1.24m. The total convenience floorspace of this combined independent provision is 2,023 sqm (net) which equates to a sales density of approximately £614 per sqm net. Based on experience elsewhere, we conclude from the results of the household telephone survey that this provision is trading below expectations. However, we consider that the trading ability of the Tesco Store is likely to improve in the next year or so as the store reaches a mature pattern of trade.
- 5.22 In total, we estimate that convenience provision in Cheetham Hill has a combined turnover of £20.8m from the survey area which equates to a sales density of £3,620 per sqm (of net retail floorspace). 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 Tesco and Iceland stores which appear to be under-trading.
- 5.23 From looking at Table 5 (Appendix 1) we can see that 41.7% of the combined convenience turnover of Cheetham Hill is derived from Zone 1, which is focussed on the District Centre. A further 41% of the turnover is derived from spend within Zone 4 which covers an area very close to the centre to the North West. Spend from Zone 2 contributes 6.9% of Cheetham Hill's overall convenience turnover, but the remaining zones contribute less than 4% each. The results reveal that Cheetham Hill draws little expenditure from the south east of the survey area. This is most likely due to the close proximity of two Asda food stores at Harpurhey and Sports City.

## Convenience Goods Global Capacity

- 5.24 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 health check in the previous section has demonstrated that the retail floorspace in Cheetham Hill is heavily focussed on convenience shopping, to a much greater extent than the national average. Based on current market shares going to the centre, we therefore identify no capacity to support further convenience floorspace in the centre up to 2026. However, a predicted increase in the new Tesco's sales density could reduce this negative capacity somewhat and absorb more of the available expenditure in the catchment.
- 5.25 Our projections are summarised in Table 5.2 below which indicates that by 2016 there will be an estimated shortfall in expenditure of £20.6m (assuming all stores are trading at their company average or at £2000 per sqm benchmark for small independent retailers). This deficit is set to reduce to £16.9m 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	- £20.6m	- £19.3m	- £18.1m	- £16.9m
Capacity Assuming Large Store Format (£10,000 per sq m net)	- 2,059 sqm	- 1,907 sqm	- 1,746 sqm	- 1,596 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 Cheetham Hill. 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 Cheetham Hill, to achieve more sustainable travel/shopping patterns. There may, therefore, be potential for Cheetham Hill 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.
- 5.27 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.

- 5.28 The survey area used for the telephone survey area is based on a 'best fit' of postal sectors around Cheetham Hill and the study area is not considered to fully represent an accurate primary catchment area for Cheetham Hill because of the spatial relationship of Cheetham Hill with other centres in the immediate area, including Oldham, Failsworth, Blackley and Harpurhey to the north east, and Salford to the west.
- 5.29 Based on the network of other centres in the area we therefore assume that a reasonable 'core' catchment area for Cheetham Hill should comprise the full extent of Zone 1, 25% of Zone 2, 30% of Zone 4, and 5% of Zones 3, 5, 6 and 7.
- 5.30 Given the interrelationship of the district centre network in this part of Manchester there will clearly be catchment overlaps between the centres. Therefore this core catchment area for Cheetham Hill should not be viewed rigidly as evidently there will be inflow and outflows of spend from this area. However, for this assessment the defined catchment area serves the purpose of examining the proportion of spend that Cheetham Hill could claw-back in a best-case scenario. Our assessment of expenditure claw-back for both main food and top-up expenditure is set out in Appendices 3.

### Claw-back of Main-food Expenditure

- 5.31 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 Cheetham Hill's core catchment area. In line with our standard approach we have applied the 70% main food weighting to the market shares.
- 5.32 Examining main food shopping habits reveals that Cheetham Hill has leakage of approximately £11.7m that could be directed towards the district centre (Table 5.3). We have modelled the expenditure for the main competing convenience attractors (Asda Harpurhey, Sainsbury's Heaton Park, Asda Sport City, Morrisons Hollinwood Avenue, Tesco Bury new Road in Prestwich, Morrisons Marlborough Mill, Tesco Valley Park in Prestwich, Tesco Salford and the Tesco Metro in Market Street in Manchester). Plan 2 illustrates the leakage of spend to other destinations. We calculate, based on this assessment, that if Cheetham Hill was able to claw back this specific leakage of spend it would be possible for stores in the centre to increase their sales densities to a level more in line with their expected trading level.

**Table 5.3: Claw-Back of Leaked Main Food Spend from the Core Catchment**

	2009	2011	2016	2021	2026
Expenditure Leakage (£000s)	11,650	11,784	12,765	14,009	15,237

## Claw back of Top-Up Food Expenditure

- 5.33 Based on the same approach, we have also examined the proportion of top-up trade that is currently leaking from Cheetham Hill'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.
- 5.34 Our assessment highlights that approximately £1.1m of top-up convenience expenditure is leaking from the core catchment area to destinations beyond Cheetham Hill, mainly Asda Harpurhey, Foodstores in Blackley, Sainsbury's Heaton Park, Foodstores in Salford, Spar on Victoria Avenue in Blackley and the Tesco metro on Market Street in Manchester). Our analysis of the potential claw-back of top-up spend is set out in (Tables 7-9, Appendix 3).
- 5.35 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. Our assessment (Table 5.4) demonstrates that there is top up expenditure leakage of £1.1m which we estimate will rise to £1.5m by 2026.

**Table 5.4: Claw-Back of Leaked Top-Up Spend from the Core Catchment**

	2009	2011	2016	2021	2026
Expenditure Leakage (£000s)	1,145	1,157	1,253	1,372	1,489

- 5.36 Clearly, this assessment of claw-back is a theoretical scenario and would require all the spend that is currently leaving Cheetham Hill's 'core catchment area' to be diverted back to the centre. Clearly this is not entirely realistic as it does not take account of commitments/proposals coming forward.
- 5.37 Our assessment identifies that there the current convenience provision in Cheetham Hill is trading below benchmark levels by -£20.6m by 2011. Therefore, even if the centre was able to claw-back the full extent of main food and top up leakage from its core catchment (£12.9m) by 2011, this assessment will not generate surplus capacity for additional convenience floorspace in the centre (Table 10, Appendix 3). It is likely that as the new trading pattern of the Tesco store matures, it will increase its market share from each of the survey zones and be the main instigator of claw-back in Cheetham Hill. On this basis, we consider that the Council should not be planning for large scale new convenience provision within the centre.

## Comparison Goods Assessment

### Cheetham Hill District Centre

- 5.38 The results of the household telephone survey indicate that comparison shopping in Cheetham Hill district centre draws 4.2% of available comparison spend from the survey area, which is low but not surprising given Cheetham Hill's role as a district centre i.e. a local convenience and service centre. It is evident that the centre

exerts the most influence over Survey Zone 1. However, the centre only attracts 8.3% of expenditure from Zone 1 with the majority of the remaining comparison expenditure from this zone going, unsurprisingly, to Manchester City Centre and Manchester Fort Shopping Park. There is some trade draw from all zones in the survey area but it fairly minimal as table 5.5 below indicates.

**Table 5.5: Cheetham Hill's Market Share by Survey Zone**

Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
8.3%	4.3%	1.1%	4.6%	3.4%	3.5%	2.8%

- 5.39 Zones 3, 6 and 7 are the furthest from Cheetham Hill district centre and consequently show the lowest market share. Zone 5 also shows a very low market share even though the southern part of this survey zone is quite close to the district centre. This zone is large and it is possible that people at the southern end of Zone 5 do some shopping in Cheetham Hill but this representation is outweighed by the bulk of the population from Zone 5 that shop elsewhere, with the majority of people from Zone 5 doing their comparison shopping in Manchester city centre, Bury, Harpurhey and Middleton.
- 5.40 On the basis of current market shares, taking account of SFT deductions, we estimate that Cheetham Hill is currently turning over approximately £9.9m and will turn over £10m of comparison goods expenditure in 2011, rising to £11.6m in 2016, to £13.9m in 2021 and £16.5m in 2026 (Table 5). Similarly, on the basis of current market shares, we estimate that the district centre currently has a comparison goods sales density of approximately £1,684 per sqm net which is broadly in line with what we would expect the centre to be achieving.
- 5.41 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 sq m (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 new floorspace should achieve approximately £1,800 per sqm (net) on the basis that new floorspace should achieve a similar sales density to what it is currently doing (Table 7, Appendix 2). This assessment has assumed that Cheetham Hill district centre will maintain its existing market share and that new comparison retail floorspace will trade at similar levels to the existing shops in the district centre. 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.
- 5.42 By virtue of projected growth in population and the estimated increases in available comparison expenditure we expect Cheetham Hill to have the capacity to accommodate an additional 15 sqm of net retail floorspace by 2011, growing to 457 sq m by 2016, to 975 sq m by 2021, and 1,472 sq m by 2026 (See Table 5.6 below). Clearly the scope for additional floorspace is fairly negligible and it is therefore apparent that the main scope for additional comparison floorspace will be based increasing market share in the centre.

**Table 5.6: Projected Residual Expenditure and Capacity for further comparison floorspace in Cheetham Hill**

Year	2011	2016	2021	2026
Residual Expenditure	£27,000	£886,000	£2.1m	£3.5m
Capacity Assuming Sales Density (£1,800 per sqm)	15 sqm	457 sqm	975 sqm	1,472 sqm

- 5.43 These results indicate that Cheetham Hill does not have a strong emphasis on comparison shopping which is consistent with the district centre's role in the sub-regional retail network. Given that over 95% of available comparison spend within the survey area is going to centres other than Cheetham Hill, there may be scope for Cheetham Hill 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 Cheetham Hill would need to relate to the role and function of the centre within the wider hierarchy and the catchment served. However, it is likely that given its role as a district centre in the local retail hierarchy it is not entirely realistic to plan for a significant proportion of new comparison floorspace especially considering the recent development of Cheetham Hill Shopping Centre.

## 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 Cheetham Hill is a vibrant and healthy centre, in line with its role as an important district centre in the north of Manchester. For example, some of the key performance indicators show that:
- the centre has a good range of independent retailers, including a number of quality independently run convenience shops which are well used and attract people to the centre;
  - there is a good balance of independent and multiple convenience stores with Tesco, Iceland and the Worldwide offering much choice in the convenience sector;
  - the vacancy rate in the centre is around the national average and there are no major concentrations of vacant units in the centre, with the exception of new units in the Cheetham Shopping Centre which is newly constructed.

### Scope for further retail provision

- 6.3 Our quantitative assessment has clearly demonstrated that there is no capacity for additional convenience goods floorspace in the centre over the forecast period, up to 2026. Furthermore, the fact that the existing foodstores in the centre appear to be under-performing benchmarked against their company averages would seem to indicate that there is no pent-up capacity for new retail floorspace at the base year.
- 6.4 Nevertheless, our qualitative assessment has identified that the centre does have a strong foodstore offer, particularly now that the Tesco store which opened in January 2009 is fully trading. We consider that when the store reaches a mature pattern of trading (usually 1 or 2 years after opening) it will attract more shoppers back to Cheetham Hill. The centre will also be enhanced when the newly developed Cheetham Shopping Centre becomes fully let which will in turn help to strengthen the retail offer in the centre and, depending on the quality of the retailers, claw back some of the expenditure leakage going to other centres, thereby improving the attractiveness of Cheetham Hill as a shopping destination.
- 6.5 As part of our assessment, we have considered the scope for Cheetham Hill to claw back a proportion of spend that is currently leaving what we have defined as Cheetham Hill's 'core catchment area'. We have identified that a significant proportion of convenience spend (£12.8m) is leaking from the core catchment area to other destinations. We would expect the centre to claw back a proportion of this spend as the Tesco stores reaches a more mature pattern of trading. With the probability of linked trips, this may improve the performance of existing



convenience retailers in the centre and help bring them more in line with company average sales densities and benchmark levels for independent retailers.

- 6.6 Based on the current performance of the centre, we do not consider that there is significant scope to plan for further convenience floorspace in the centre up to 2026. However, there may be scope for further small-scale convenience provision provided it is integrated successfully in the centre and helps to maintain and enhance the overall vitality and viability of Cheetham Hill, by generating increased trips, enhancing consumer choice, spend and spin-off benefits to other shops, businesses and facilities. Clearly, further convenience provision, provided it is of a suitable scale and in an appropriate location, would be supported by planning policy.
- 6.7 The results of our household survey indicate that Cheetham Hill, unsurprisingly, is currently only retaining 4.2% of available comparison spend from the survey area. The remaining spend is flowing to other destinations/centres including Manchester City Centre and Manchester Fort Shopping Park. Given the role of Cheetham Hill as a district centre in the local hierarchy, we consider the aim of the centre should be to consolidate and enhance existing provision.
- 6.8 Therefore It is our judgement that the Council should focus in the first instance on promoting 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 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 more secondary 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. The overall objective should be to at least maintain the centre's market share going forward in order to preserve its vitality and viability.

## **Maintaining Diversity**

- 6.9 Overall, we consider that the district centre's role and function appears to meet the expectations in the UDP as a second tier centre below the principal centre of Manchester, but 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, and avoid the increasingly criticised trend of clone towns with the same list of well known high-street retailers.
- 6.10 Presently the centre has a few multiple retailers and is not in any 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.

- 6.11 In order to maintain diversity the local business community could benefit through the Council's commitment to pursue a strategy for investment, including:
- public realm improvements;
  - maintenance of shop-fronts;
  - improved security measures;
  - improvement and increased provision of modern parking facilities;
  - local highway improvements, and
  - possible traffic calming measures.
- 6.12 Improvements to the physical environment could include a policy or 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 Cheetham Hill will be crucial to attract and maintain existing retailers and service businesses and encourage people to keep visiting the centre.
- 6.13 The LDF and future strategy for Cheetham Hill should therefore also seek to enhance the environment and facilitate pedestrian movement around the centre and provide initiatives to maintain and improve shop frontages. As we have seen in policy and through our assessment of the centre's retail structure, Cheetham Hill is not envisaged to expand significantly and the focus should be on enhancing the existing composition and environment in order to consolidate its role and attract new multiple/independent retailers to the centre.
- 6.14 Controlling the specific uses within a centre can also help to protect the prime retail areas within a centre. We would recommend that Cheetham Hill introduces primary and secondary frontages which would comprise a Primary Shopping Area. 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 Cheetham Hill to protect the vitality and viability of the centre. It would seem appropriate therefore 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 consolidate Cheetham Hill's position and retail offer but also examine the possibility, where necessary, 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 the diverse retail offer in the centre whilst also exploring options to enhance the environment and connectivity of the centre. Planning policies can help to deliver such objectives. However centres such as Cheetham Hill 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 Cheetham Hill, 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 Cheetham Hill 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.

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**PLAN 1**



**SURVEY AREA**

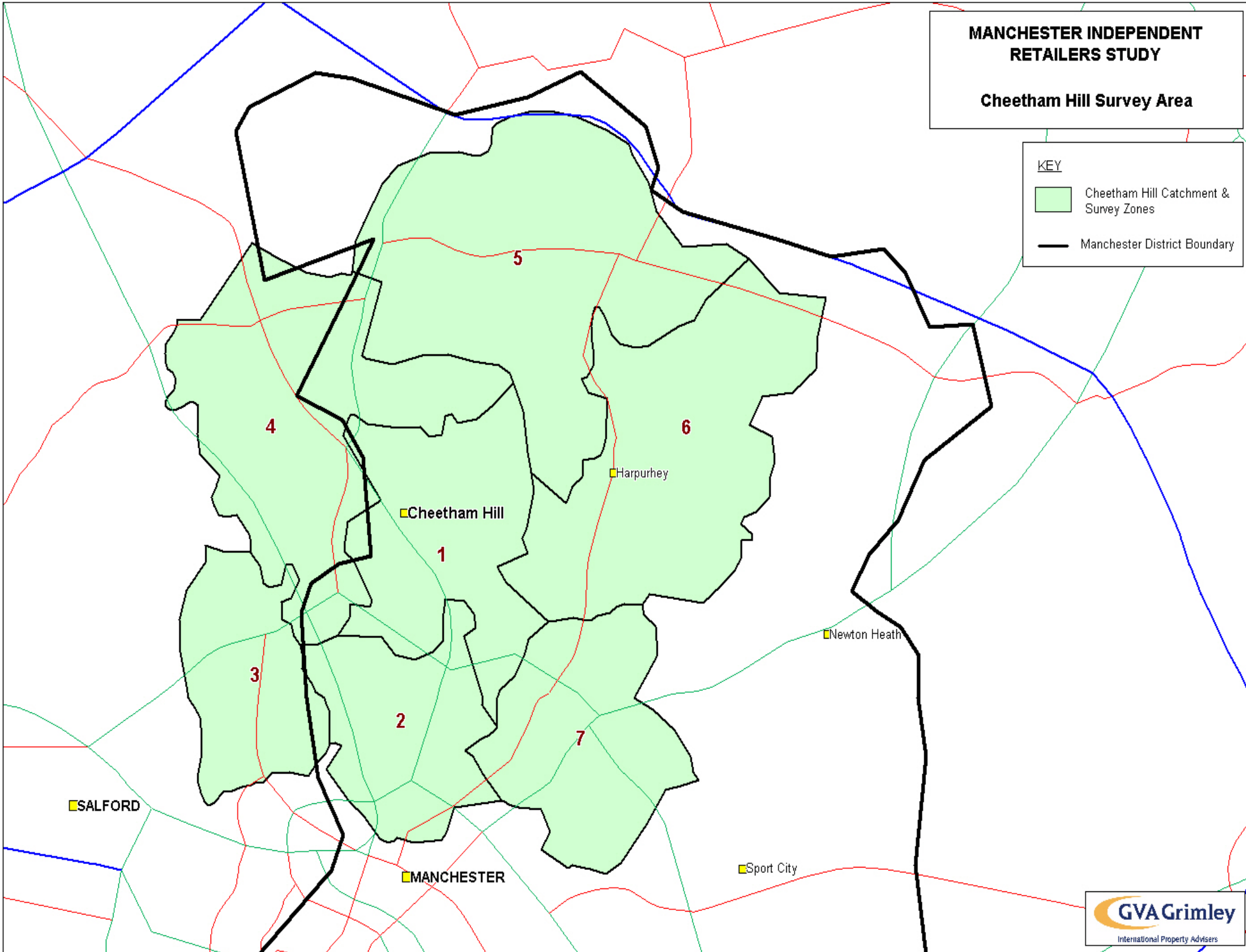
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# MANCHESTER INDEPENDENT RETAILERS STUDY

## Cheetham Hill Survey Area

### KEY

-  Cheetham Hill Catchment & Survey Zones
-  Manchester District Boundary



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**PLAN 2**

**LEAKAGE OF CONVENIENCE SPEND**


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# MANCHESTER INDEPENDENT RETAILERS STUDY

## Cheetham Hill Leakage (Main Food and Top-Up)

### KEY

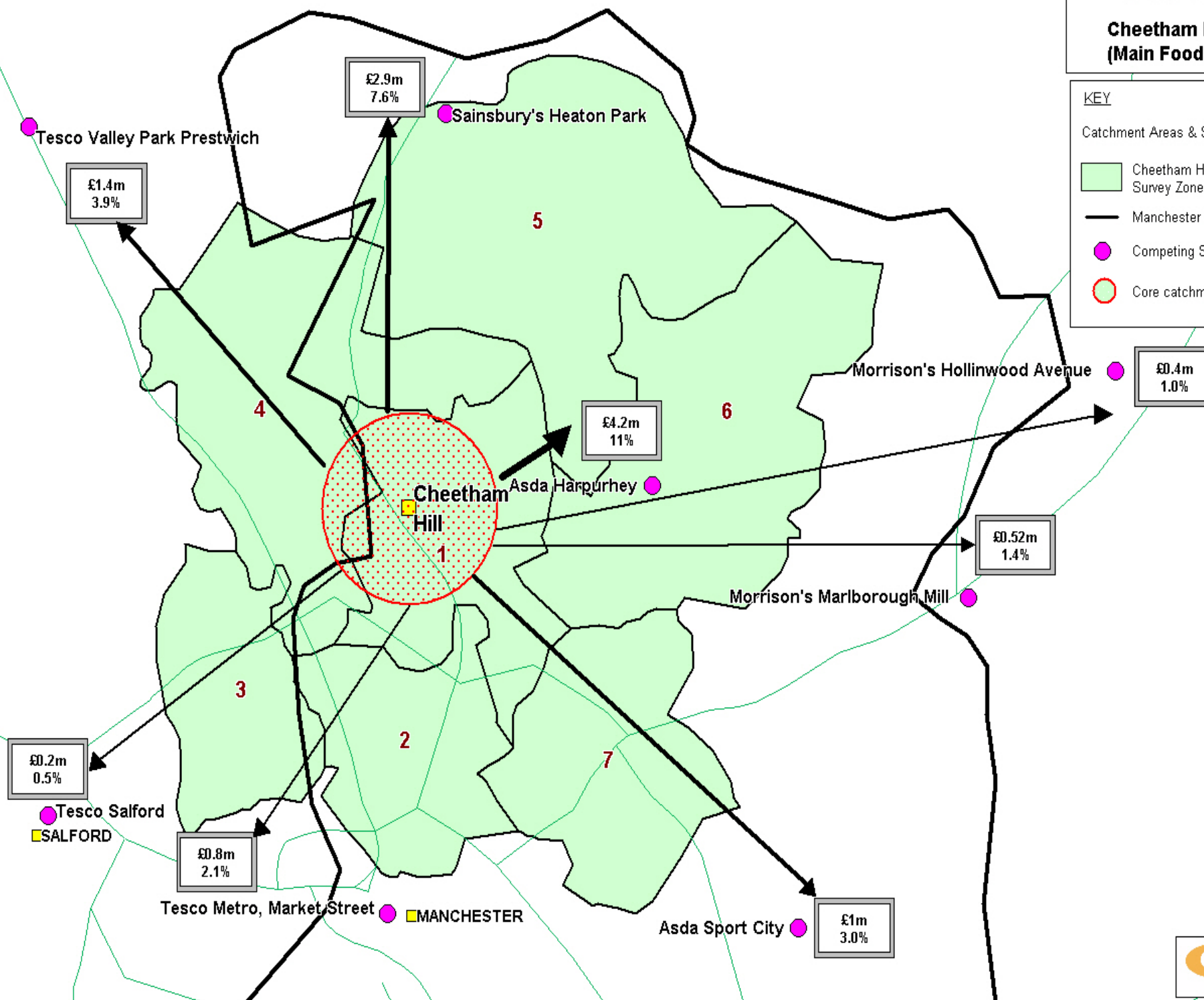
Catchment Areas & Survey Zones

 Cheetham Hill Catchment & Survey Zones

 Manchester District Boundary

 Competing Stores

 Core catchment (indicative)



### 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**



# CHEETHAM HILL 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	M8 0, M8 5, M8 9	14,152	14,459	15,264	16,179	16,967
2	M3 1, M4 4, M8 8	6,951	7,159	7,647	8,015	8,303
3	M7 1, M7 2	8,446	8,641	9,124	9,556	9,877
4	M7 4, M8 4, M25 0	26,096	26,389	27,356	28,586	29,712
5	M9 0, M9 6, M9 8	20,863	21,050	21,652	22,416	22,931
6	M9 4, M9 5, M9 7, M40 9	21,278	21,520	22,270	23,036	23,565
7	M40 7, M40 8	9,284	9,397	9,835	10,169	10,418
<b>TOTAL</b>		<b>107,070</b>	<b>108,615</b>	<b>113,148</b>	<b>117,957</b>	<b>121,773</b>

SOURCE: Experian Business Solutions

**TABLE 1A**  
**POPULATION GROWTH RATES**

POPULATION INCREASE			
2009-2011 (%)	2009-2016 (%)	2009-2021 (%)	2009-2026 (%)
2.2	7.9	14.3	19.9
3.0	10.0	15.3	19.5
2.3	8.0	13.1	16.9
1.1	4.8	9.5	13.9
0.9	3.8	7.4	9.9
1.1	4.7	8.3	10.7
1.2	5.9	9.5	12.2
<b>1.4</b>	<b>5.7</b>	<b>10.2</b>	<b>13.7</b>

**CHEETHAM HILL 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	1,429	1,396	1,435	1,392	1,435	1,385	1,493	1,433	1,561	1,499	1,633	1,568
2	1,407	1,375	1,413	1,370	1,413	1,363	1,470	1,411	1,537	1,476	1,608	1,544
3	1,511	1,476	1,517	1,472	1,517	1,464	1,579	1,516	1,651	1,585	1,727	1,658
4	1,564	1,528	1,570	1,523	1,570	1,515	1,634	1,569	1,709	1,641	1,787	1,716
5	1,560	1,524	1,566	1,519	1,566	1,511	1,630	1,565	1,705	1,636	1,783	1,711
6	1,551	1,515	1,557	1,510	1,557	1,503	1,621	1,556	1,695	1,627	1,772	1,702
7	1,558	1,522	1,564	1,517	1,564	1,509	1,628	1,563	1,702	1,634	1,780	1,709

Source: Experian

**TABLE 3**  
**SURVEY AREA CONVENIENCE GOODS RETAIL EXPENDITURE FORECASTS**

<b>GROWTH IN PER CAPITA RETAIL EXPENDITURE:</b>		<b>2007-2009</b>	0.2% pa		
<b>Convenience Goods</b>		<b>2009-2011</b>	0.0% pa		
		<b>2011-2016</b>	0.8% pa		
		<b>2016-2021</b>	0.9% pa		
		<b>2021-2026</b>	0.9% pa		
<b>ZONE</b>	<b>2009</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>
	(£000)	(£000)	(£000)	(£000)	(£000)
1	19,695	20,019	21,878	24,252	26,599
2	9,525	9,759	10,792	11,829	12,816
3	12,429	12,650	13,828	15,146	16,372
4	39,748	39,987	42,914	46,898	50,979
5	31,696	31,816	33,879	36,682	39,244
6	32,140	32,338	34,645	37,479	40,096
7	14,087	14,185	15,369	16,619	17,806
<b>TOTAL</b>	<b>159,320</b>	<b>160,754</b>	<b>173,305</b>	<b>188,905</b>	<b>203,911</b>

Source: Tables 1 & 2

**CHEETHAM HILL INDEPENDENT STUDY**  
**RETAIL STUDY - OCTOBER 2009**  
 CONVENIENCE MODELLING

**TABLE 4**  
**CONVENIENCE GOODS ALLOCATION - % MARKET SHARE**

Catchment Zone	TESCO					ICELAND					OTHER STORES					TOTAL				
	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	33.1	33.1	33.1	33.1	33.1	5.8	5.8	5.8	5.8	5.8	4.9	4.9	4.9	4.9	4.9	43.8	43.8	43.8	43.8	43.8
2	14.9	14.9	14.9	14.9	14.9	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.2	0.2	0.2	15.1	15.1	15.1	15.1	15.1
3	3.3	3.3	3.3	3.3	3.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.3	3.3	3.3	3.3	3.3
4	20.2	20.2	20.2	20.2	20.2	0.7	0.7	0.7	0.7	0.7	0.6	0.6	0.6	0.6	0.6	21.5	21.5	21.5	21.5	21.5
5	2.1	2.1	2.1	2.1	2.1	0.7	0.7	0.7	0.7	0.7	0.0	0.0	0.0	0.0	0.0	2.8	2.8	2.8	2.8	2.8
6	1.5	1.5	1.5	1.5	1.5	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.1	1.5	1.5	1.5	1.5	1.5
7	2.7	2.7	2.7	2.7	2.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.7	2.7	2.7	2.7	2.7

SOURCE: Household Survey

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

Catchment Zone	TESCO					ICELAND					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	6,527	6,634	7,250	8,037	8,815	1,140	1,159	1,267	1,404	1,540	957	973	1,064	1,179	1,293	8,625	8,766	9,581	10,620	11,648
2	1,420	1,455	1,609	1,764	1,911	0	0	0	0	0	15	15	17	18	20	1,435	1,470	1,626	1,782	1,931
3	413	420	459	503	544	0	0	0	0	0	3	3	4	4	4	416	423	463	507	548
4	8,017	8,065	8,656	9,459	10,282	278	280	300	328	357	245	247	265	290	315	8,541	8,592	9,221	10,077	10,954
5	666	668	711	770	824	219	220	234	253	271	4	4	5	5	5	889	892	950	1,028	1,100
6	472	475	509	551	589	0	0	0	0	0	16	16	17	19	20	489	492	527	570	610
7	376	379	410	444	475	0	0	0	0	0	0	0	0	0	0	376	379	410	444	475
<b>TOTALS</b>	<b>17,891</b>	<b>18,097</b>	<b>19,605</b>	<b>21,528</b>	<b>23,441</b>	<b>1,637</b>	<b>1,659</b>	<b>1,801</b>	<b>1,986</b>	<b>2,168</b>	<b>1,242</b>	<b>1,259</b>	<b>1,371</b>	<b>1,515</b>	<b>1,658</b>	<b>20,770</b>	<b>21,015</b>	<b>22,777</b>	<b>25,029</b>	<b>27,266</b>

SOURCE: Tables 3 & 4

# CHEETHAM HILL INDEPENDENT STUDY

## RETAIL STUDY - OCTOBER 2009

### CONVENIENCE MODELLING

TABLE 6

CHEETHAM HILL CONVENIENCE FLOORSPACE

Store	Net Flsp (sqm)	Net Convenience (sqm)	Co Average Sales (Benchmark) (£ per sq m net)	Average Turnover (From Household Survey) (£000s)	Actual Turnover (£000s)	Actual Sales Density (£000s)
Tesco	4,476	3,133	10,873	34,067	17,891	5,710
Iceland	582	582	5,726	3,333	1,637	2,813
Independents	2,023	2,023	2,000	4,046	1,242	614
<b>TOTAL</b>	<b>7,081</b>	<b>5,738</b>	<b>7,223</b>	<b>41,446</b>	<b>20,770</b>	<b>3,620</b>

\* Accounting for a convenience:comparison split at a ratio of 70:30 in the new Tesco foodstore

# CHEETHAM HILL INDEPENDENT STUDY

## RETAIL STUDY - OCTOBER 2009

### CONVENIENCE MODELLING

**TABLE 7**  
**FUTURE SHOP FLOORSPACE CAPACITY IN CHEETHAM HILL - LARGE FORMAT**

	Sales Efficiency Increase		2008-2011	0	
			2011-2016	0.20%	
			2016 onwards	0.50%	
	<b>CONVENIENCE GOODS</b>				
	<b>2009</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>
Residents Spending (£000)	20,770	21,015	22,777	25,029	27,266
Existing Shop Floorspace (sq m net)	5,738	5,738	5,738	5,738	5,738
Sales per sq m net £	3,620	7,223	7,295	7,480	7,668
Sales from Existing Floorspace (£000)	20,770	41,446	41,862	42,919	44,003
Sales from Committed Floorspace (£000)	0	0	0	0	0
Residual Spending to Support new shops (£000)	0	-20,431	-19,084	-17,890	-16,737
Sales per sq m net in new shops (£) Based on large store format (see note 1)	10,000	10,000	10,100	10,355	10,617
Capacity for new floorspace (sq m net)	0	-2,043	-1,889	-1,728	-1,576

## **APPENDIX 2**

### **COMPARISON CAPACITY TABLES**

# CHEETHAM HILL 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	M8 0, M8 5, M8 9	14,152	14,459	15,264	16,179	16,967
2	M3 1, M4 4, M8 8	6,951	7,159	7,647	8,015	8,303
3	M7 1, M7 2	8,446	8,641	9,124	9,556	9,877
4	M7 4, M8 4, M25 0	26,096	26,389	27,356	28,586	29,712
5	M9 0, M9 6, M9 8	20,863	21,050	21,652	22,416	22,931
6	M9 4, M9 5, M9 7, M40 9	21,278	21,520	22,270	23,036	23,565
7	M40 7, M40 8	9,284	9,397	9,835	10,169	10,418
<b>TOTAL</b>		<b>107,070</b>	<b>108,615</b>	<b>113,148</b>	<b>117,957</b>	<b>121,773</b>

SOURCE: Experian Business Solutions

**TABLE 1A**  
**POPULATION GROWTH RATES**

POPULATION INCREASE			
2009-2011 (%)	2009-2016 (%)	2009-2021 (%)	2009-2026 (%)
2.2	7.9	14.3	19.9
3.0	10.0	15.3	19.5
2.3	8.0	13.1	16.9
1.1	4.8	9.5	13.9
0.9	3.8	7.4	9.9
1.1	4.7	8.3	10.7
1.2	5.9	9.5	12.2
<b>1.4</b>	<b>5.7</b>	<b>10.2</b>	<b>13.7</b>

# CHEETHAM HILL 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	2,246	2,066	2,264	2,038	2,269	2,013	2,567	2,246	2,947	2,578	3,383	2,960
2	2,409	2,216	2,428	2,185	2,433	2,159	2,753	2,409	3,161	2,765	3,628	3,175
3	2,355	2,167	2,374	2,136	2,379	2,111	2,691	2,355	3,090	2,703	3,547	3,104
4	2,661	2,448	2,682	2,414	2,688	2,385	3,041	2,661	3,491	3,055	4,008	3,507
5	2,422	2,228	2,441	2,197	2,446	2,171	2,768	2,422	3,178	2,780	3,648	3,192
6	2,475	2,277	2,495	2,245	2,500	2,218	2,828	2,475	3,247	2,841	3,728	3,262
7	2,236	2,057	2,254	2,029	2,258	2,004	2,555	2,236	2,934	2,567	3,368	2,947

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	28,836	29,107	34,280	41,715	50,224
2	15,191	15,458	18,420	22,165	26,361
3	18,045	18,239	21,485	25,834	30,656
4	62,998	62,939	72,788	87,323	104,201
5	45,842	45,696	52,437	62,325	73,197
6	47,777	47,739	55,114	65,450	76,866
7	18,833	18,833	21,989	26,102	30,701
TOTAL	237,522	238,012	276,513	330,914	392,205

Source: Tables 1 & 2



## CHEETHAM HILL INDEPENDENT STUDY

### RETAIL STUDY - OCTOBER 2009

#### COMPARISON MODELLING

TABLE 4

#### COMPARISON GOODS ALLOCATION - MARKET SHARE %

Zone	CHEETHAM HILL				
	2009 (%)	2011 (%)	2016 (%)	2021 (%)	2026 (%)
1	8.3	8.3	8.3	8.3	8.3
2	4.3	4.3	4.3	4.3	4.3
3	1.1	1.1	1.1	1.1	1.1
4	4.6	4.6	4.6	4.6	4.6
5	3.4	3.4	3.4	3.4	3.4
6	3.5	3.5	3.5	3.5	3.5
7	2.8	2.8	2.8	2.8	2.8
<b>Total Market Share Zone 1-7</b>	<b>4.2%</b>	<b>4.2%</b>	<b>4.2%</b>	<b>4.2%</b>	<b>4.2%</b>

SOURCE:

Telephone Survey

TABLE 5

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

Zone	CHEETHAM HILL				
	2009 (£000)	2011 (£000)	2016 (£000)	2021 (£000)	2026 (£000)
1	2,392	2,414	2,843	3,460	4,166
2	660	671	800	963	1,145
3	199	202	237	286	339
4	2,905	2,902	3,356	4,027	4,805
5	1,552	1,548	1,776	2,111	2,479
6	1,689	1,688	1,948	2,314	2,717
7	534	534	623	740	870
<b>Total</b>	<b>9,931</b>	<b>9,958</b>	<b>11,585</b>	<b>13,899</b>	<b>16,521</b>

SOURCE: Tables 3 & 4

TABLE 6

#### COMPARISON GOODS FLOORSPEACE

	Gross Floorspace Sq m	Net Floorspace Sq m	Comp flsp in Foodstores*	Total Net Floorspace Sq m
Cheetham Hill District Centre	7,005	4,553	1,343	5,896
<b>Total</b>	<b>7,005</b>	<b>4,553</b>	<b>1,343</b>	<b>5,896</b>

SOURCE: Experian Category Report

\* Accounting for a convenience:comparison split at a ratio of 70:30 in the new Tesco foodstore

# CHEETHAM HILL 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)	237,522	238,012	276,513	330,914	392,205
2	Market Share of Comparison Goods	4.2	4.2	4.2	4.2	4.2
3	Total Town Centre Turnover (£000s)	9,931	9,958	11,585	13,899	16,521
4	Existing Comparison Retail Floorspace in Town Centre (sq m net)	5,896	5,896	5,896	5,896	5,896
5	Sales (£ per sq m) net	1,684	1,684	1,815	2,003	2,212
6	Sales from Existing Floorspace (£000s)	9,931	9,931	10,699	11,812	13,042
7	Residual Expenditure (£000s)	0	27	886	2,087	3,479
8	Sales per sq m net in new shops (£)	1,800	1,800	1,939	2,141	2,364
9	Capacity for new floorspace (sq m net)	0	15	457	975	1,472

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 & TOP-UP EXPENDITURE

# CHEETHAM HILL 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	M8 0, M8 5, M8 9	14,152	14,459	15,264	16,179	16,967
2	M3 1, M4 4, M8 8	6,951	7,159	7,647	8,015	8,303
3	M7 1, M7 2	8,446	8,641	9,124	9,556	9,877
4	M7 4, M8 4, M25 0	26,096	26,389	27,356	28,586	29,712
5	M9 0, M9 6, M9 8	20,863	21,050	21,652	22,416	22,931
6	M9 4, M9 5, M9 7, M40 9	21,278	21,520	22,270	23,036	23,565
7	M40 7, M40 8	9,284	9,397	9,835	10,169	10,418
<b>TOTAL</b>		<b>107,070</b>	<b>108,615</b>	<b>113,148</b>	<b>117,957</b>	<b>121,773</b>

SOURCE: Experian Business Solutions

**TABLE 1A**  
**POPULATION GROWTH RATES**

POPULATION INCREASE			
2009-2011 (%)	2009-2016 (%)	2009-2021 (%)	2009-2026 (%)
2.2	7.9	14.3	19.9
3.0	10.0	15.3	19.5
2.3	8.0	13.1	16.9
1.1	4.8	9.5	13.9
0.9	3.8	7.4	9.9
1.1	4.7	8.3	10.7
1.2	5.9	9.5	12.2
<b>1.4</b>	<b>5.7</b>	<b>10.2</b>	<b>13.7</b>

# CHEETHAM HILL 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	1,429	1,396	1,435	1,392	1,435	1,385	1,493	1,433	1,561	1,499	1,633	1,568
2	1,407	1,375	1,413	1,370	1,413	1,363	1,470	1,411	1,537	1,476	1,608	1,544
3	1,511	1,476	1,517	1,472	1,517	1,464	1,579	1,516	1,651	1,585	1,727	1,658
4	1,564	1,528	1,570	1,523	1,570	1,515	1,634	1,569	1,709	1,641	1,787	1,716
5	1,560	1,524	1,566	1,519	1,566	1,511	1,630	1,565	1,705	1,636	1,783	1,711
6	1,551	1,515	1,557	1,510	1,557	1,503	1,621	1,556	1,695	1,627	1,772	1,702
7	1,558	1,522	1,564	1,517	1,564	1,509	1,628	1,563	1,702	1,634	1,780	1,709

Source: Experian

**TABLE 3**  
**SURVEY AREA CONVENIENCE GOODS RETAIL EXPENDITURE FORECASTS**

<b>GROWTH IN PER CAPITA RETAIL EXPENDITURE:</b>		<b>2007-2009</b>	0.2% pa		
<b>Convenience Goods</b>		<b>2009-2011</b>	0.0% pa		
		<b>2011-2016</b>	0.8% pa		
		<b>2016-2021</b>	0.9% pa		
		<b>2021-2026</b>	0.9% pa		
<b>ZONE</b>	<b>2009</b>	<b>2011</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>
	(£000)	(£000)	(£000)	(£000)	(£000)
1	19,695	20,019	21,878	24,252	26,599
2	9,525	9,759	10,792	11,829	12,816
3	12,429	12,650	13,828	15,146	16,372
4	39,748	39,987	42,914	46,898	50,979
5	31,696	31,816	33,879	36,682	39,244
6	32,140	32,338	34,645	37,479	40,096
7	14,087	14,185	15,369	16,619	17,806
<b>TOTAL</b>	<b>159,320</b>	<b>160,754</b>	<b>173,305</b>	<b>188,905</b>	<b>203,911</b>

Source: Tables 1 & 2

CHEETHAM HILL INDEPENDENT STUDY  
RETAIL STUDY - OCTOBER 2009  
LEAKAGE / CLAW-BACK      MAIN FOOD

TABLE 4  
CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	ASDA HARPURHEY					SAINSBURYS HEATON PARK					ASDA SPORT CITY					MORRISONS HOLLINWOOD AVE					TESCO BURY NEW ROAD, PRESTWICH					MORRISONS MARLBOROUGH MILL					
	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	
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	
1	9.9	9.9	9.9	9.9	9.9	5.0	5.0	5.0	5.0	5.0	3.5	3.5	3.5	3.5	3.5	0.6	0.6	0.6	0.6	0.6	0.6	1.7	1.7	1.7	1.7	1.7	1.8	1.8	1.8	1.8	1.8
2	1.3	1.3	1.3	1.3	1.3	0.0	0.0	0.0	0.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0
3	0.2	0.2	0.2	0.2	0.2	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	0.3	0.3	0.3	0.3	0.3	0.0	0.0	0.0	0.0	0.0
4	0.8	0.8	0.8	0.8	0.8	4.0	4.0	4.0	4.0	4.0	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	1.9	1.9	1.9	1.9	1.9	0.0	0.0	0.0	0.0	0.0
5	1.2	1.2	1.2	1.2	1.2	0.7	0.7	0.7	0.7	0.7	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.2	0.2	0.2
6	2.1	2.1	2.1	2.1	2.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.4	0.4	0.4	0.4	0.4	0.4	0.0	0.0	0.0	0.0	0.0	0.3	0.3	0.3	0.3	0.3
7	1.6	1.6	1.6	1.6	1.6	0.0	0.0	0.0	0.0	0.0	0.8	0.8	0.8	0.8	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	0.0
Total	2.32%					1.78%					0.72%					0.25%					0.72%					0.33%					

TESCO VALLEY PARK PRESTWICH						TESCO SALFORD					TESCO METRO MARKET ST MANCHESTER					TOTAL				
2009	2011	2016	2021	2026		2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026
(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
0.8	0.8	0.8	0.8	0.8	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	23.3	23.3	23.3	23.3	23.3
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.6	5.6	5.6	5.6	5.6	8.4	8.4	8.4	8.4	8.4
0.1	0.1	0.1	0.1	0.1	0.1	0.9	0.9	0.9	0.9	0.9	0.0	0.0	0.0	0.0	0.0	1.6	1.6	1.6	1.6	1.6
2.3	2.3	2.3	2.3	2.3	2.3	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	10.0	10.0	10.0	10.0	10.0
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.4	2.4	2.4	2.4	2.4
0.0	0.0	0.0	0.0	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	3.0
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	2.5	2.5	2.5	2.5	2.5
0.68%						0.12%					0.40%					7.31%				

SOURCE: Household Survey

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

Catchment Zone	ASDA HARPURHEY					SAINSBURYS HEATON PARK					ASDA SPORT CITY					MORRISONS HOLLINWOOD AVE					TESCO BURY NEW ROAD, PRESTWICH					MORRISONS MARLBOROUGH MILL					
	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)	
1	1,957.7	1,989.8	2,174.7	2,410.7	2,643.9	978.8	994.9	1,087.3	1,205.3	1,321.9	689.3	700.7	765.7	848.8	930.9	124.1	126.1	137.8	152.8	167.6	330.9	336.3	367.6	407.4	446.9	358.5	364.3	398.2	441.4	484.1	
2	125.0	128.1	141.6	155.3	168.2	0.0	0.0	0.0	0.0	0.0	136.7	140.0	154.9	169.8	183.9	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
3	20.4	20.8	22.7	24.9	26.9	10.9	11.1	12.1	13.3	14.3	5.7	5.8	6.3	6.9	7.4	0.0	0.0	0.0	0.0	0.0	40.5	41.2	45.0	49.3	53.3	0.0	0.0	0.0	0.0	0.0	0.0
4	308.8	310.7	333.4	364.4	396.1	1,586.0	1,595.5	1,712.3	1,871.2	2,034.1	133.6	134.4	144.2	157.6	171.3	100.2	100.8	108.1	118.2	128.5	767.9	772.6	829.1	906.1	984.9	0.0	0.0	0.0	0.0	0.0	0.0
5	373.9	375.3	399.6	432.7	462.9	230.7	231.6	246.6	267.0	285.7	43.3	43.4	46.2	50.1	53.6	43.3	43.4	46.2	50.1	53.6	0.0	0.0	0.0	0.0	0.0	52.1	52.3	55.7	60.3	64.6	
6	679.4	683.6	732.4	792.3	847.6	21.4	21.5	23.0	24.9	26.7	30.4	30.6	32.7	35.4	37.9	132.7	133.6	143.1	154.8	165.6	0.0	0.0	0.0	0.0	0.0	103.5	104.1	111.6	120.7	129.1	
7	226.3	227.9	246.9	267.0	286.1	6.4	6.5	7.0	7.6	8.1	108.0	108.7	117.8	127.4	136.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.4	6.5	7.0	7.6	8.1	
TOTALS	3,692	3,736	4,051	4,447	4,832	2,834	2,861	3,088	3,389	3,691	1,147	1,164	1,268	1,396	1,522	400	404	435	476	515	1,139	1,150	1,242	1,363	1,485	520	527	572	630	686	

TESCO VALLEY PARK PRESTWICH						TESCO SALFORD					TESCO METRO MARKET ST MANCHESTER					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)	(£000)
151.7	154.1	168.5	186.7	204.8		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4,590.9	4,666.3	5,099.8	5,653.2	6,200.1
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	535.0	548.2	606.2	664.5	719.9	796.7	816.3	902.7	989.5	1,072.1
10.9	11.1	12.1	13.3	14.3		111.4	113.3	123.9	135.7	146.7	0.0	0.0	0.0	0.0	0.0	199.7	203.2	222.1	243.3	263.0
926.5	932.1	1,000.3	1,093.2	1,188.3		83.5	84.0	90.1	98.5	107.1	83.5	84.0	90.1	98.5	107.1	3,989.9	4,013.9	4,307.7	4,707.6	5,117.3
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.8	7.8	8.3	9.0	9.6	751.0	753.9	802.8	869.2	929.9
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	967.4	973.4	1,042.8	1,128.1	1,206.9
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.4	7.4	8.1	8.7	9.3	354.5	357.0	386.8	418.2	448.1
1,089	1,097	1,181	1,293	1,407		195	197	214	234	254	634	647	713	781	846	11,650	11,784	12,765	14,009	15,237

SOURCE: Tables 3 & 4

## CHEETHAM HILL 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	4,591	4,666	5,100	5,653	6,200
2	797	816	903	990	1,072
3	200	203	222	243	263
4	3,990	4,014	4,308	4,708	5,117
5	751	754	803	869	930
6	967	973	1,043	1,128	1,207
7	354	357	387	418	448
TOTAL	11,650	11,784	12,765	14,009	15,237

# CHEETHAM HILL INDEPENDENT STUDY

RETAIL STUDY - OCTOBER 2009

LEAKAGE / CLAW-BACK

TOP-UP

TABLE 7

CONVENIENCE GOODS ALLOCATION - % MARKET SHARE

Catchment Zone	ASDA HARPERHAY					FOODSTORES BLACKLEY					SAINSBURYS HEATON PARK					FOODSTORES SALFORD				
	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026
	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	1.6	1.6	1.6	1.6	1.6	0.0	0.0	0.0	0.0	0.0	0.2	0.2	0.2	0.2	0.2	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	0.1	0.1	0.1	0.1	0.1	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	0.2	0.2	0.2	0.2	0.2
4	0.1	0.1	0.1	0.1	0.1	0.2	0.2	0.2	0.2	0.2	0.1	0.1	0.1	0.1	0.1	0.4	0.4	0.4	0.4	0.4
5	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	0.4	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	0.0	0.0	0.0	0.0	0.0
7	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	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>1.73%</b>					<b>0.36%</b>					<b>0.24%</b>					<b>0.61%</b>				

SPAR VICTORIA AVE, BLACKLEY					TESCO METRO MARKET ST MANCHESTER					TOTAL				
2009	2011	2016	2021	2026	2009	2011	2016	2021	2026	2009	2011	2016	2021	2026
(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.8	1.8	1.8	1.8	1.8
0.0	0.0	0.0	0.0	0.0	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2
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
0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.1	0.9	0.9	0.9	0.9	0.9
0.1	0.1	0.1	0.1	0.1	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	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	0.1	0.1	0.1	0.1	0.1	0.3	0.3	0.3	0.3	0.3
<b>0.13%</b>					<b>0.51%</b>					<b>3.59%</b>				

SOURCE: Household Survey

TABLE 8

CONVENIENCE GOODS ALLOCATION - SPEND (£) 2007 PRICES

Catchment Zone	ASDA HARPERHAY					FOODSTORES BLACKLEY					SAINSBURYS HEATON PARK					FOODSTORES SALFORD				
	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	315.1	320.3	350.0	388.0	425.6	0.0	0.0	0.0	0.0	0.0	39.4	40.0	43.8	48.5	53.2	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	4.8	4.9	5.4	5.9	6.4	0.0	0.0	0.0	0.0	0.0
3	2.7	2.8	3.0	3.3	3.6	0.0	0.0	0.0	0.0	0.0	1.2	1.3	1.4	1.5	1.6	20.4	20.7	22.7	24.8	26.9
4	54.9	55.2	59.2	64.7	70.4	62.0	62.4	66.9	73.2	79.5	23.8	24.0	25.7	28.1	30.6	174.1	175.1	188.0	205.4	223.3
5	38.4	38.5	41.0	44.4	47.5	50.4	50.6	53.9	58.3	62.4	3.2	3.2	3.4	3.7	3.9	0.0	0.0	0.0	0.0	0.0
6	116.3	117.1	125.4	135.7	145.1	3.9	3.9	4.2	4.5	4.8	3.2	3.2	3.5	3.7	4.0	0.0	0.0	0.0	0.0	0.0
7	24.8	25.0	27.0	29.2	31.3	0.0	0.0	0.0	0.0	0.0	1.4	1.4	1.5	1.7	1.8	0.0	0.0	0.0	0.0	0.0
<b>TOTALS</b>	<b>552</b>	<b>559</b>	<b>606</b>	<b>665</b>	<b>724</b>	<b>116</b>	<b>117</b>	<b>125</b>	<b>136</b>	<b>147</b>	<b>77</b>	<b>78</b>	<b>85</b>	<b>93</b>	<b>102</b>	<b>194</b>	<b>196</b>	<b>211</b>	<b>230</b>	<b>250</b>

SPAR VICTORIA AVE, BLACKLEY					TESCO METRO MARKET ST MANCHESTER					TOTAL				
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)
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	354.5	360.3	393.8	436.5	478.8
0.0	0.0	0.0	0.0	0.0	112.9	115.6	127.9	140.2	151.9	117.6	120.5	133.3	146.1	158.3
0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	24.4	24.8	27.1	29.7	32.1
0.0	0.0	0.0	0.0	0.0	35.8	36.0	38.6	42.2	45.9	350.6	352.7	378.5	413.6	449.6
39.9	40.1	42.7	46.2	49.4	0.0	0.0	0.0	0.0	0.0	131.9	132.4	140.9	152.6	163.3
2.6	2.6	2.8	3.0	3.2	0.0	0.0	0.0	0.0	0.0	126.0	126.8	135.8	146.9	157.2
0.0	0.0	0.0	0.0	0.0	13.4	13.5	14.6	15.8	16.9	39.6	39.9	43.2	46.7	50.0
<b>43</b>	<b>43</b>	<b>45</b>	<b>49</b>	<b>53</b>	<b>162</b>	<b>165</b>	<b>181</b>	<b>198</b>	<b>215</b>	<b>1,145</b>	<b>1,157</b>	<b>1,253</b>	<b>1,372</b>	<b>1,489</b>

SOURCE: Tables 3 & 4



## CHEETHAM HILL 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	355	360	394	437	479
2	118	121	133	146	158
3	24	25	27	30	32
4	351	353	379	414	450
5	132	132	141	153	163
6	126	127	136	147	157
7	40	40	43	47	50
TOTAL	1,145	1,157	1,253	1,372	1,489

## CHEETHAM HILL INDEPENDENT STUDY

### RETAIL STUDY - OCTOBER 2009

#### LEAKAGE / CLAW-BACK

Table 10

#### Capacity from Claw-Back

Future floorspace capacity in Cheetham Hill through Claw-back of Expenditure.	2009	2011	2016	2021	2026
Main Food Shopping (000s)	11,650	11,784	12,765	14,009	15,237
Top-Up Shopping (000s)	1,145	1,157	1,253	1,372	1,489
Total Leakage (000s)	12,795	12,941	14,017	15,381	16,727