Manchester 2023 Retail and Leisure Study

Final Report

ON BEHALF OF MANCHESTER CITY COUNCIL

April 2024

Contents

1. Introduction

Instruction and Purpose

1.1 Nexus Planning has been instructed by Manchester City Council (hereafter referred to as 'the Council') to undertake a new Retail and Leisure Study. The primary focus of the Study is to establish the current position in respect of the need for additional retail and leisure facilities in the City of Manchester authority area, and to consider the vitality and viability of Manchester's principal centres.

1.2 The Study replaces the previous Quantitative Retail Needs Update Report 2010, which was undertaken by Alyn Nichols & Associates, and which reported in November 2010. The principal purpose of the commission is to inform the emerging Local Plan Review (which has an end date of 2040), and to act as an evidence base to assist in the determination of future planning applications for retail and other main town centre uses.

1.3 The supplied Brief identifies key outcomes for the Study which are outlined on a thematic basis. The outcomes relate to the vitality and viability of centres; the quantitative need for additional convenience and comparison goods retail; and planning policy recommendations. We summarise the identified key outcomes below.

Vitality and Viability of Centres

1.4 In respect of the vitality and viability of Manchester's defined centres, the Study will:

- consider retail and leisure in the context of national planning policy and guidance, including recently made Article 4 Directions;
- set the context of retail and leisure in Manchester through reference to national trends and local data in respect of the performance of centres;
- recommend the policy approach which best supports the vitality and viability of Manchester's defined centres, identifying the specific approach appropriate for district centres and reflecting the need to cater for the diverse communities that reside in the City;
- consider trends in respect of different types of retail and leisure provision, recognising the importance of the food and beverage leisure economy to the city centre and the opportunities associated with large format leisure provision such as The Factory and the Co-op Live Arena; and
- review existing strategies ensuring that the context and role of centres is fully reflected.

Assessment of Quantitative Needs

1.5 In terms of identifying future quantitative needs across the timeframe of the emerging Local Plan, the key objectives are as follows:

- undertake a household survey to inform an understanding of retail expenditure and patterns in Manchester for convenience goods and comparison goods retailing;
- project retail capacity needs across the City based on population and expenditure growth to 2040; and
- consider the qualitative and quantitative need for leisure along with appropriate locations for additional leisure provision.

Policy Recommendations

1.6 The Study will conclude by addressing the following planning policy requirements:

- identify the contribution of centres towards achieving reduced carbon emissions;
- identify policy interventions which can support the achievement of the Manchester Local Plan Review Objectives for Centres, reflecting the need to support a balance mix of uses whilst being mindful of local amenity issues;
- review the defined retail hierarchy across the City;
- review the Manchester city centre and the district centres boundaries;
- review the existing development plan boundaries which relate to defined centres in terms of their consistency with current national planning policy; and
- review the current development plan retail impact test and whether schemes of 650 sq.m or less should generally still be considered of local significant only.

General Methodological Approach

1.7 To address the above matters, there is a need to both understand shopping and leisure-use patterns and to understand residents' views in respect of key centres and their offer.

1.8 Accordingly, the Study is underpinned by new empirical evidence in the form of: a household shopper survey; an in-street survey in Manchester city centre to understand visitors' usage of the centre; stakeholder consultation; and site visits to survey land use and assess the health of Manchester's principal centres.

1.9 The household survey was undertaken by NEMS Market Research in December 2022 and covers 22 separate zones, which are collectively considered representative of the principal catchment area for retail facilities and leisure facilities located within the City of Manchester. The zones are consistent with those utilised in the previous Quantitative Retail Needs Update Report 2010.

1.10 A plan of the Study Area is provided at Appendix 1, and the tabulated household survey results are provided at Appendix 2. The Study Area includes parts of Bury, Oldham, Rochdale, Stockport, Tameside, Trafford, and Salford, where residents may look to facilities in the City of Manchester to meet their retail and leisure needs.

1.11 In this regard, it is important to recognise that shopping habits are not governed by local authority area boundaries. It is therefore appropriate to consider the 'inflow' of retail expenditure from residents of neighbouring authority areas to destinations in the City of Manchester to identify retailers' overall turnover and understand the role of centres and standalone stores across the wider area. The household survey also allows us to identify expenditure which originates within Manchester but which 'leaks' to destinations outside of the authority area.

1.12 Our research also comprises an in-street survey which was undertaken by NEMS Market Research in February 2023. The survey was undertaken in Manchester city centre and relates to visitors use and perception of the city centre only. The in-street survey identifies the principal reason for visiting the city centre and captures the range of activities that respondents will undertake in the city centre during their visit. The duration of visit is recorded along with respondents' frequency of visit. Each respondent was also asked their views in respect of what they like or dislike about the city centre, and how it could be improved.

Structure of Report

1.13 Our report firstly provides an overview of prevailing retail and leisure trends, before then going on to consider the planning policy context for the Study. We then present key findings from the in-street survey before reviewing the vitality and viability of Manchester city centre, and the 17 district centres across the City.

1.14 The remainder of the report considers retail and leisure needs arising within the City authority area to 2040. As part of this process, we identify the existing and future population and expenditure across the Study Area, before then summarising key findings in respect of the shopping patterns established by the household survey. The final sections of the report set out our conclusions in respect of retail and leisure needs and provide our planning policy recommendations.

1.15 Accordingly, our report is structured as follows:

- Section 2 sets out key retail and leisure trends of relevance to the commission;
- Section 3 provides an overview of the planning policy context;
- Section 4 presents key findings from the Manchester city centre in-street survey;
- Section 5 summarises our assessment of the vitality and viability of the defined centres;
- Section 6 provides an overview of forecast changes in Study Area population and expenditure;
- Section 7 summarises the findings of the household survey;
- Section 8 provides an assessment of retail needs;
- Section 9 provides an assessment of leisure needs; and
- Section 10 summarises our key findings and sets out our conclusions and policy recommendations.

2. Current and Emerging Retail and Leisure Trends

2.1 In order to provide a context for this Study and to help identify the sectors that are more likely to be the subject of additional development proposals, we set out a summary of current retail and leisure trends below. In reading the summary, it should be noted that the retail and leisure sectors are dynamic and, whilst online shopping and economic conditions have impacted on the high street, new retailers and formats continue to evolve to meet shoppers' needs.

2.2 The below commentary should therefore be taken as a 'snapshot' in respect of current market conditions; it will be necessary to judge future development proposals for main town centre uses with reference to the prevailing conditions at the time of a proposal's determination. Whilst the impact of Covid-19 on the retail and leisure sectors has lessened in 2022 and 2023, the trading outlook remains challenging due to inflationary pressures and significant increases in the cost of living. We reflect further on the current economic outlook below.

Economic Conditions

2.3 The UK economy was impacted significantly by the Covid-19 pandemic in 2020 and 2021, and by restrictions on movement and behaviour which sought to mitigate its impact. This uncertain background caused retail and leisure expenditure (and business investment) to decline. Household spending fell by over 20% quarter-on-quarter in the second quarter of 2020 following the imposition of national lockdown measures. This is the largest quarterly contraction on record. Retail sales volumes also suffered double-digit falls in April 2020 as all but essential stores closed during the height of the lockdown.

2.4 However, following the gradual reopening of businesses over summer 2020, the economy returned to growth, with this gathering momentum as a greater number of sectors reopened, including hospitality and leisure services. However, a more pronounced resurgence in the number of cases of Covid-19 resulted in the Government reinstating a nationwide lockdown in early 2021. The general economic outlook in 2022 and 2023 has continued to be of concern given very significant increases in the rate of inflation and the general cost of living.

2.5 In February 2024, Experian published its Retail Planner Briefing Note 21 ('ERPBN21'), which identifies anticipated future growth in the retail and leisure sectors and considers likely changes in bricks and mortar retail floorspace and online sales.

2.6 ERPBN21 anticipates that retail spending has been squeezed in 2022 and 2023 as a consequence of inflationary pressure and increases in the cost of living. Page 5 of ERPBN21 provides the following summary of the economic outlook:

'Looking ahead, spending growth over the course of 2024 remains affected by the lingering effects of the cost-of-living crisis, as though inflation is slowing towards target, high interest rates continue to constrain household budgets, particularly those with mortgage debt. A high tax burden is also acting as a dampener on discretionary income. Rising real pay growth and continued strength in the labour market should still allow for a less negative year than 2023.'

2.7 It is clear that the Covid-19 pandemic has accelerated the shift to online retailing with a consequent reduction in bricks and mortar retail floorspace. As a consequence, the proportion of expenditure committed via special forms of trading (i.e. internet and mail order sales) has increased.

2.8 More generally, as a result of relatively modest growth forecasts and the shift to online retailing, Experian forecasts that there will be a reduction in the stock of retail floorspace over the next few years.

2.9 In terms of inflation, Office for National Statistics data[1] indicates that the rate of inflation (as measured by the consumer price index) increased from 0.8% at April 2020 to 1.5% at April 2021, before then increasing significantly to 9.0% at April 2022. The rate of inflation appears to have peaked at 11.1% in October 2022 and has reduced significantly to 6.7% at August 2023. Retail has been an industry under significant stress, as many retailers find themselves squeezed between rising costs and the increasing volume of sales over the internet. Such difficulties have, of course, been exacerbated by the Covid-19 pandemic and the cost of living crisis associated with rising energy prices and inflation.

2.10 There will still be the need and demand for physical stores, despite the increase in shopping online. This is particularly the case for convenience goods sales given that online shopping orders are typically picked from the shelves of physical stores. In respect of comparison goods, there is a need for the offer to become more 'experiential' to encourage shoppers onto the high street, and to ensure that shopping is viewed as a pleasurable pastime. The shopping experience needs to evolve and diversify both to attract footfall and convert increased activity into sales. Independents clearly have an important role to play in adding interest and in providing differentiation between shopping venues.

2.11 In considering the current strength of the retail and leisure sectors, it is important to recognise that different types of retailers have been the subject of different fortunes.

2.12 Non-essential retailers haven been impacted by enforced 'lockdown' closures in 2020 and 2021. However, dispensing chemists traded more strongly from March 2020, and their sales continued to be above pre-pandemic levels into 2022 and early 2023. Foodstores also generally traded consistently above their pre-pandemic levels. This was initially due to a degree of stockpiling of grocery goods, but some ongoing boost in sales was evident due to the ongoing prevalence of working from home. Furniture and homeware retailers also generally benefitted from people spending more time in their homes and wanting to improve their own environment. However, in light of increasing inflation and changes to working patterns throughout 2022, it is understood that there has now been a shift away from this pattern.[2]

Available Expenditure and the Impact of the Internet

2.13 Experian expenditure data and growth forecasts confirm that the pandemic has resulted in turbulent short term changes in per capita convenience and comparison goods expenditure. In this regard, ERPBN21 identifies that per capita convenience goods expenditure decreased by 5.8% in 2022 with a further reduction of 3.0% in 2023. This follows a previous reduction of 1.7% in 2021. Before this, in 2020, per capita convenience goods expenditure increased by 8.6%. The strong level of growth at 2020 is largely attributable to consumers spending more on such goods as a result of lockdown measures. Limited annual per capita expenditure growth (relative to that which has been achieved historically) is anticipated to return across the medium to long term.

2.14 As the below Table 2.1 shows, the position in respect of annual per capita comparison goods expenditure has been changeable in the past few years. Whilst annual per capita comparison goods growth of 8.1% was recorded in 2021, this followed a reduction of 7.9% in 2020. Forecast per capita comparison goods expenditure increases over the medium and longer term are positive but still below the level apparent at the turn of the millennium.

[1] ONS 'Consumer price inflation tables' dataset, July 2023.
[2] Article headlined 'Retail sales in Great Britain rise despite cost of living crisis', The Guardian, 19 August 2022.

Table 2.1: Experian's Identified and Forecast UK Convenience and Comparison Goods Per Capita Expenditure Growth

Volume Growth per Head (%)	2018	2019	2020	2021	2022	2023	2024	2025	2026-29	2031-40
Convenience goods	-0.2	-1.0	8.6	-1.7	-5.8	-3.0	-0.5	-0.2	0.0	0.1
Comparison goods	0.4	2.9	-7.9	8.1	-3.3	-3.3	-1.2	2.7	3.1	2.8

Source: Figure 1a and Figure 1b of Experian Retail Planner Briefing Note 21

2.15 Whilst the above figures identify a level of growth which is significantly below that which has historically been achieved, the situation for high street stores is exacerbated through the increasing amount of expenditure which is committed through special forms of trading[3] and, in particular, through online sales.

2.16 The below Table 2.2 sets out Experian's identified and forecast level of special forms of trading as a proportion of overall convenience and comparison goods expenditure. Experian estimates that special forms of trading will account for just under four out of every ten pounds spent on comparison goods and almost a quarter of convenience goods expenditure at 2034.

Table 2.2: Experian's Identified and Forecast Market Share of Non-Store Retail Sales for Convenience and Comparison Goods Sectors

Volume Growth Per Head (%)	2018	2019	2020	2021	2022	2023	2024	2029	2034	2039
Convenience goods	10.8	12.9	17.1	19.2	16.4	15.8	17.3	21.2	23.3	24.6
Comparison goods	21.8	25.0	39.2	37.9	31.5	30.4	32.5	36.5	38.5	39.7

Source: Figure 5 of Experian Retail Planner Briefing Note 21

2.17 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some 'bricks and mortar' retailers. However, it is important to note that changes in how people shop also bring about some opportunities for retailers trading from the high street. In particular, many stores sell online but fulfil orders from regular stores rather than warehouses[4], with purchases therefore helping to sustain tangible retail floorspace. As a consequence, Experian also provides an 'adjusted' estimate of special forms of trading, which relates to expenditure which is not available to actual stores. These figures are provided in Table 2.3 below. The figures demonstrate the high proportion of online sales which are fulfilled from physical stores, and therefore the 9importance of retaining this offer on our high streets.

Table 2.3: Experian's Identified and Forecast Adjusted Market Share of Non-Store Retail Sales for Convenience and Comparison Goods Sectors

Volume Growth Per Head (%)	2018	2019	2020	2021	2022	2023	2024	2029	2034	2039
Convenience goods	3.2	3.9	5.1	5.8	4.9	4.7	5.2	6.3	7.0	7.4
Comparison goods	16.3	18.8	29.4	28.5	23.6	22.8	24.3	27.4	28.8	29.7

Source: Figure 5 of Experian Retail Planner Briefing Note 21

Convenience Goods

2.18 Recent socio-economic conditions have led to significant shifts in convenience goods retailing, which have resulted in the 'big four' supermarket operators' market share being cut. Indeed, analysis from Kantar has identified that

[3] Including internet sales, mail order, stalls and markets, door-to-door and telephone sales.
[4] This is particularly the case with food shopping and speciality comparison goods purchases, where retailers often try to tap into a wider market through an online presence.

the traditional 'big four' supermarket operators are no longer such, with Aldi's market share overtaking that of Morrisons as of December 2023.

2.19 Mintel[5] finds that the decline of the food superstore is well established and that this can be attributed to two matters.

2.20 Firstly, people are undertaking food shopping in different ways. More people are living in town and city centres and are generally purchasing their own home at a later age than was previously the case.[6] Mintel indicates that such people are more likely to undertake food shopping on an 'as needs' basis and are more likely to eat out or use takeaways. As such, they are less likely to have need to undertake a weekly 'main food shop'.

2.21 Secondly, the current uncertainty in the economy has made discount foodstore operators (namely Aldi and Lidl) a more attractive proposition, and many such foodstores are thriving given that shoppers are currently having to be 'money savvy'. Discounters have also made efforts to try to compete more directly with the 'big four' supermarket operators, with larger stores, greater ranges of goods, fresh foods, and premium products becoming increasingly prevalent. It is evident that the likes of Aldi and Lidl are no longer 'hard discounters' in quite the same way they once were, as they now fulfil a wider range of customers' needs by offering a greater range of products. The move towards the middle ground has allowed discounters to secure market share from both superstores and smaller convenience stores. In addition, we note that discount retailers are often happy to trade alongside more upmarket convenience goods retailers (such as M&S Foodhall) as, collectively, the two stores can meet a comprehensive range of grocery shopping needs.

2.22 The shifts in the sector are illustrated with reference to changes in retailers' market share in recent years, as shown in Table 2.4.

Table 2.4: Market Share of Convenience Goods Operators

Operator	December 2016	December 2017	December 2018	December 2019	December 2020	December 2021	December 2022	December 2023
Tesco	28.4%	28.1%	27.8%	27.4%	27.3%	27.9%	27.5%	27.6%
Sainsbury's	16.5%	16.5%	16.1%	16.0%	15.9%	15.7%	15.5%	15.8%
Asda	15.3%	15.3%	15.2%	14.8%	14.3%	14.2%	14.0%	13.6%
Morrisons	10.8%	10.8%	10.6%	10.3%	10.4%	10.1%	9.1%	8.8%
Aldi	6.2%	6.8%	7.4%	7.8%	7.4%	7.7%	9.1%	9.3%
Co-op	6.3%	5.8%	5.9%	6.1%	6.0%	5.8%	5.6%	5.4%
Lidl	4.6%	5.0%	5.3%	5.9%	6.1%	6.3%	7.2%	7.7%
Waitrose	5.1%	5.2%	5.0%	5.0%	5.0%	5.1%	4.7%	4.6%
Iceland	2.2%	2.2%	2.2%	2.3%	2.5%	2.4%	2.5%	2.4%
Symbols & Independent	1.8%	1.7%	1.5%	1.6%	1.7%	1.6%	1.4%	1.4%
Other Outlets	1.7%	1.6%	1.7%	1.6%	1.8%	1.8%	1.8%	1.8%
Ocado	1.1%	1.1%	1.2%	1.3%	1.6%	1.7%	1.7%	1.7%

Source: KANTAR Grocery Market Share. Figures shown are for the final reporting period in each calendar year.

[5] 'UK Retail Rankings', Mintel, April 2018.
[6] Article headlined 'Average UK first-time buyer is now older than 30, says Halifax', The Guardian, January 2022.

2.23 The past few years has seen the closure of a number of unprofitable grocery stores (from small convenience stores to large superstores) and the continuation of Aldi and Lidl's expansion programme. Aldi announced in September 2023 that it intends to open another 500 stores in the coming years.7 Lidl intends to open a further 250 stores across the UK.8 Whilst the traditional 'big four' remain more cautious in respect of new openings, a limited number of proposals for mid-sized foodstores are currently being promoted by these operators in areas where there is a growing population, or an obvious shortfall in existing provision. These stores are often of a scale that is broadly comparable to that provided by Aldi and Lidl, which allows customers to shop in a convenient and efficient manner.

Comparison Goods

2.24 The comparison goods sector is currently being squeezed by a number of factors, including increasing operator costs and a reduction in discretionary spending as a result of increases in the cost of living.

2.25 Whilst the sector is continually evolving and there are a number of retailers performing well (including JD Sports, Next, Primark, and Zara), recent headlines have focused on failing retailers and store closures. High profile retailers that have struggled include Debenhams, which announced the closure of all 124 stores in December 2020, and the Arcadia Group, which owned Topshop, Topman and Dorothy Perkins. Arcadia Group announced the closure of around 500 stores in February 2021. Furthermore, Intu Properties, one of Britain's biggest shopping centre owners, fell into administration in June 2020 after failing to secure an agreement with its creditors. More recently, Wilko entered administration in August 2023, although in October 2023, the retailer announced that it was set to make a return to the UK high streets and retail parks, with five standalone concept stores opening before Christmas 2023. The future of the Manchester city centre store is still uncertain.

2.26 Whilst the loss of the some of the above names will have significant repercussions for certain towns (particularly those that have lost one or more of Debenhams, Marks & Spencer, or House of Fraser from their high street), some well-known retailers have failed to 'move with the times' and update their offer, accommodation, and online presence. This is partly a consequence of retailers struggling to reinvest in their business when margins are tight (or non-existent).

2.27 Many operators have also rationalised their portfolio with the aim of serving the UK by concentrating on larger centres, supplemented by a strong online presence. It will be interesting to see whether any permanent change in respect of working from home may act to counterbalance this 'polarisation' trend, given the prospect of fewer commuters travelling to larger centres and greater numbers of people spending the working day in and around their home. The impact on larger centres may be to reduce footfall, particularly within the week, and result in the shift in expenditure being directed to the smaller town, district, and local centres. Whilst this will be a positive for the smaller centres, larger centres may suffer as a result.

2.28 Whilst structural changes have had a material impact on the vitality and viability of many UK high streets, there are some beneficiaries. Notwithstanding Wilko's recent difficulties, some 'discount variety' operators, such as B&M Bargains and Poundland, have taken advantage of lower rents and reoccupied a number of medium to large retail units. However, as evidenced by recent events, the discount variety market may be approaching capacity.

[7] Article headlined 'Aldi claims it is increasingly shoppers' main supermarket for weekly shop', The Guardian, 8 September 2023.
[8] As set out in the press release headlined 'Lidl continues to search to secure sites for new stores', 24 April 2023 (https://corporate.lidl.co.uk/media-centre/pressreleases/2023/lidl-continues-search-to-secure-sites-for-new-stores).

Leisure and Food & Drink

2.29 The greater availability of high street units appears to have helped stoke an entrepreneurial spirit in recent years, with a number of centres beginning to benefit from a greater focus on independent retailers and also modern markets, which are frequently focused around food and drink operators.

2.30 More generally, the food and drink sector was buoyed pre-pandemic by the success of mid-market national multiples, which expanded quickly across the UK. However, this market has become saturated in many locations and a number of high profile operators have been in financial difficulty. Given the problems suffered by such operators, the market has become more cautious and mid-market operators are picking new sites carefully as a result. Instead, we have seen a number of independent operators flourish, both before and throughout the pandemic, and a desire for customers to choose local operators over larger regional and national brands.

2.31 A further significant recent high street success story has been the resurgence of the town centre leisure sector, which has resulted in new cinemas being developed close to the shopping core and the emergence of 'competitive socialising' concepts, which include bowling, crazy golf, table tennis, darts, axe-throwing, escape rooms and other seemingly niche pursuits.

2.32 Cinema openings have been on the up in recent years (until the Covid-19 pandemic) and 'boutique' cinema operators – including Curzon, Everyman, and The Light – are able to operate from smaller sites in town centres (partly as a consequence of digital technology). Town centre cinema development has successfully underpinned wider mixed-use developments, as food and drink operators are typically keen to locate in close proximity to benefit from spin-off custom. New, innovative leisure operators have been particularly beneficial both in re-using existing difficult to let premises, and in driving the evening economy.

2.33 More generally, the gym market continues to perform well, with there now being around 7,200 health and fitness clubs across the UK, which are estimated to have a total turnover of approximately £2bn.[9] Around one in every seven Britons has a gym membership. Budget gyms are currently particularly popular, with operators such as Pure Gym, the Gym Group, and easyGym utilising a format that is based on low costs and high volume.

The Night-Time Economy

2.34 The term night-time economy is used to describe a wide range of activities that (typically) take place after 5 pm. This could range from a trip to the theatre or cinema, to a family meal, to a night out at a club. A successful night-time economy generally caters for a wide range of demographics and interests.

2.35 Creating a safe, vibrant and well-balanced evening and night-time offer is a challenge that can dramatically improve the overall health of a town centre and boost the economy.

2.36 The Association of Town and City Management ('ATCM') has identified a number of themes to help improve the attraction and operation of the night-time economy, which are summarised as follows:

- **Alive After Five** – This relates to revisions to trading hours to better suit customers' shopping needs and availability. A Retail Trading Hours Study commissioned by ATCM found that sales between 5 pm and 8 pm are typically 50% greater than those between 9 am and 11am. Revising trading hours to open and close later could increase sales by around 10% to 12%.

[9] 'Number of health clubs in Europe in 2020, by country' dataset, Statistica, 27 October 2022.

- **Late Night Transport** – The lack of frequent, efficient and safe public transport late at night, or at least the perception of this being the case, could be having a detrimental effect on night-time economy and social scene. One way of increasing night-time visitor numbers is to promote late-night travel provision and its publicity.
- **Purple Flag** – This is an accreditation scheme which recognises excellence in the management of town and city centres at night. Obtaining Purple Flag accreditation demonstrates that a town's night-time economy offers clean and safe environments, great bars and clubs, a variety of arts and cultural attractions, and excellent transport links.
- **Evening Economy Ambassadors** – The ambassadors improve the evening and night-time experience in a town centre by liaising between visitors, police, door staff, licensees, and transport operators.
- **Light Night** – This is an initiative where town or city centres stays open after dark for people to enjoy local shops and services within a wider cultural event involving music, art and, most importantly, through the lighting up of buildings and light-based art installations.

2.37 The above list is not exhaustive, and the development of a bespoke evening economy strategy can help prioritise and deliver events and initiatives which draw on a town centre's strengths and address weaknesses.

Planning Reform on the High Street

2.38 One of the most impactful planning reforms in recent times has been the consolidation of a number of separate Use Classes under a single Class E 'Commercial, Business and Service' use. This update to the Town and Country Planning (Use Classes) Order 1987 (the 'UCO') came into effect in September 2020. The new Use Class combines shops, restaurants, offices, gyms and nurseries (amongst other uses) such that planning permission is no longer required to switch uses.

2.39 Furthermore, in March 2021, an update was made to the General Permitted Development) (England) Order 2015. This allows for the change of use from Class E properties to residential from August 2021 (extending a right that had previously been restricted to office uses). An application to the determining authority for 'prior approval' is required for limited consideration of impacts relating to transport, contamination, flood risk, noise, light, and neighbourhood amenity. Further limitations apply in Conservation Areas and for nurseries, as well as in areas covered by 'Article 4 directions' where permitted development rights are extinguished.

2.40 On 20 July 2021, paragraph 53 of a new iteration of the National Planning Policy Framework ('NPPF') set out limitations on the use of Article 4 directions. The revised national policy seeks to qualify the areas in which it is justified to introduce Article 4 directions, limiting local authorities' ability to control development.

2.41 The changes in the application of Article 4 directions were first put forward in the January 2021 consultation for draft revisions to the NPPF. However, the actual policy provision differs from the initial consultation in a couple of key areas. Paragraph 53 of the previous NPPF of July 2021 recognised that the loss of the 'essential core of a primary shopping area' could result in wholly unacceptable adverse impacts on an area's vitality and viability. This was the Government's first acknowledgement of the potential for the permitted development rights to undermine the health of centres in the NPPF. The updated text also introduced a requirement for 'robust evidence' to support the removal of development rights. The most recent iteration of the NPPF, published in December 2023, retains these changes.

2.42 This can be seen as generally good news for local authorities concerned about the erosion of retail and service uses, and the need to protect vulnerable centres from potentially poor quality residential development. Protection of the vitality and viability of a high street or town centre against the adverse impacts of change of use is now established as justification for issuing an Article 4 direction.

2.43 In addition to the above, the Levelling-up and Regeneration Act 2023 (LURA) received Royal Assent on 26 October 2023. The Secretary of State for Levelling Up, Housing and Communities, Rt Hon Michael Gove MP, has stated that the new Act:

'…will deliver revitalised high streets and town centres. A faster and less bureaucratic planning system with developers held to account… Communities taking back control of their future with new powers to shape their local area. And our long-term levelling up missions enshrined in law.'

2.44 Most of the provisions of the LURA that pertain to development management and plan-making have no appointed commencement date as yet, given the need for secondary legislation to enact these measures. Notwithstanding, the Act is expected to have a number of important implications for the future of town centres and high streets, including:

- **High Street Rental Auction Process:** Subject to forthcoming regulations to be made by the Secretary of State, the LURA grants local authorities the power to hold rental auctions in respect of 'persistently vacant' commercial premises located on high streets and in defined town centres. The process will require landlords to let these properties to new tenants such as local businesses or community groups. The objective of this measure is to reduce the number of vacant properties and ensure that short to medium-term meanwhile uses can help drive footfall on the high street.

- **Locally-led Urban Development Corporations:** The Act introduces a new power for a local authority, or two or more local authorities acting jointly, to propose to the Secretary of State that s/he designate an area of land as an urban development area and establish a development corporation to lead regeneration in that area. Oversight of these urban development areas and corporations will be the responsibility of the relevant local authority or authorities, rather than central government, with the details of how specific functions will be exercised to be set out in future Regulations by the Secretary of State. Locally-controlled development corporations have the potential to be a powerful tool for the transformation of struggling town centres, having wide-ranging planning and development management powers that can effect large-scale change.

- **Supplementary Plans:** Local planning authorities will be given the ability to prepare Supplementary Plans to address site-specific needs or opportunities which require a new planning framework to be prepared quickly (such as a new regeneration opportunity) or to set out design codes for a specific site or area. Unlike the older Supplementary Planning Documents (SPDs) which they replace, Supplementary Plans will have the weight of the development plan. The LURA allows for the Secretary of State to make Regulations in respect of the preparation, withdrawal or revision of Supplementary Plans. The possible benefits of Supplementary Plans include more speed and certainty for developers of major town centre regeneration projects, with key aspects, such as policies for design, being afforded the same weight as the development plan.

- **Amendments to Legislation on Compulsory Purchase Orders (CPOs):** The LURA amends the existing Town and Country Planning Act 1990 to clarify that local authorities may use their power to acquire land by CPO for the purposes of 'regeneration'. It also modernises and streamlines the current CPO system by, for example, making explicit allowance for online publicity in the Acquisition of Land Act 1981, extending the period within which CPO powers can be exercised, and granting Inspectors the ability to choose the appropriate procedure to confirm a CPO. These amendments recognise the potential for CPOs to stimulate regeneration in town centres that suffer from concentrations of long-term vacancies within various land ownerships.

- **Changes relating to Pavement Licensing**: The LURA will make permanent the temporary changes to the pavement licensing system introduced by the Business and Planning Act 2020 in response to the Covid-19 pandemic. This will enable high street hospitality businesses to acquire fast-track pavement licences permitting the placement of removeable furniture along adjacent highways to allow for food and drink to be sold and served outdoors year-round.

Implications for the Manchester Authority Area

2.45 The above trends have significant implications for the Manchester authority area.

2.46 Manchester city centre itself has been the subject of substantial change in recent years. A number of high profile national multiples have closed stores (including Debenhams, Topshop and Wilko), and the demand for retail premises has generally lessened. Furthermore, online competition also impacts on the need to visit larger centres to purchase fashion goods and big ticket items.

2.47 However, Manchester remains a shopping venue of regional importance and, as such, remains a key location for the majority of bricks and mortar retailers. Its resilience is also underpinned by its strong leisure and evening economy. This, in turn, has been boosted by the very significant increase in the city centre's population over the past 20 years. Manchester has consistently expanded its cultural offer over this period, and its evening economy has also been assisted by a boom in 'competitive socialising' venues. Such venues typically have a significant floorspace requirement and collectively occupy a significant quantum of floorspace in key city centre leisure destinations (including Printworks, the Northern Quarter and First Street). Notwithstanding this, it is important to recognise that in recent years Manchester's leisure economy has been significantly impacted by the Covid-19 pandemic, both in terms of trading restrictions and in respect of a greater propensity to work from home. Leisure operators are also being squeezed by inflationary pressures which mean that costs have increased whilst the amount of discretionary expenditure at patrons' disposal has decreased.

2.48 The leisure economy will return to growth in future years and Manchester is particularly well place to secure a greater proportion of such expenditure growth due to improvements in its cultural offer, most notably in terms of The Factory and the Co-op Live Arena, alongside a range of smaller leisure venues across the city centre and further afield. However, the present economic environment is a challenging one for leisure operators. As such, leisure uses have not been able to make up the shortfall in demand from retail operators in recent years. Accordingly, as we go on to explain in greater detail in Section 5 of this report, the city centre has experienced an increase in its vacancy rate as a result.

2.49 Whilst the substantial increase in the city centre population has generally been of benefit to commercial operators, we note that the City Council has been concerned for some time about the reuse of office floorspace as residential accommodation. As a consequence, the City Council made four Article 4 Directions in April 2019 which came into force in May 2019 but have since expired. The purpose of the Article 4 Directions is to extinguish permitted development rights which would otherwise provide for the change from office to residential dwellings. The Directions cover Manchester city centre and Strangeways together with commercial areas in North Manchester, South Manchester, and Wythenshawe. We return to the matter of permitted development rights later in this report.

2.50 Due to the significant increase in the residential population, the role of the city centre is evolving in respect of meeting day-to-day shopping needs. In terms of the grocery sector, Manchester city centre is generally served by convenience stores with only a small number of supermarkets centrally located. These include: Aldi in the Arndale Centre; Aldi at Great Ancoats Street; Lidl at Piccadilly; M&S Foodhall at Market Street; and Tesco Metro at Market

Street. In general, the level of provision has not kept pace with city centre population growth and we note that Lidl's website[10] identifies a requirement for additional stores in Ancoats, Deansgate and Victoria, together with further requirements in Ardwick, Blackley, Burnage, Collyhurst, Crumpsall, Didsbury, Eastlands, Gorton, Hulme, Hyde, Miles Platting, Whalley Range and Wythenshawe. Whilst it is highly unlikely that Lidl would commit to bringing forward new stores in all of these areas simultaneously, the scope of Lidl's outstanding requirements in the City of Manchester is symptomatic of the difficulties associated in assembling larger sites in a tight urban environments and the need to compete with other land uses (including residential) when acquiring land.

2.51 Key requirements in smaller centres are varied and are considered in greater depth in subsequent sections of this report. As evidenced by Lidl's requirement list, smaller centres and suburban areas remain of interest to grocery operators and there is a clear need to ensure that vacant retail floorspace is repurposed and that defined centres drive activity throughout the day and into the evening.

2.52 Given changes in the retail sector, it will be important to for Manchester city centre, and the City's 17 district centres to provide a greater experiential offer to attract activity and encourage visitors to stay for longer periods. The independent retail and food and drink sectors are likely to be a particularly important in this regard. There may also be a benefit in actively managing centres to assist with their general maintenance and to help allow for greater differentiation between different centres' respective offers.

2.53 There is a need for flexibility in planning for town centres, so they can adapt to future needs and accommodate a wider range of uses. This is particularly important following the Covid-19 pandemic to help sustain the recovery of high streets and to ensure that they meet local needs in a sustainable manner. Manchester's district centres are not sustained through an influx of office workers, and any longer-term trend to working from home may provide ongoing potential for residents to use nearby centres during the week and particularly at lunchtime.

2.54 As we go on to explore in greater detail in this report, future retail and centres planning policy should be sufficiently flexible to allow for an appropriate range of town centre uses beyond retail, and surplus retail stock should be repurposed or redeveloped to support new residential, leisure and community uses.

[10] https://www.realestate-lidl.co.uk/new-store-site-requirements, consulted on 22 September 2023.

3. Planning Policy Context

3.1 In order to shape the direction of this Study, it is helpful to understand relevant retail and town centre planning policy at a national and local level. As such, we first summarise national planning policy of relevance before considering retail and town centre development plan policy as set out in the current development plan for Manchester. We also consider changes to the Use Classes Order and the application of permitted development rights to town centre uses.

Revised National Planning Policy Framework

3.2 The most recent iteration of the National Planning Policy Framework ('NPPF') was published in December 2023. The NPPF reflects the fact that the traditional role of town centres has been somewhat undermined by structural changes in the retail sector, and that there may be a need to plan for a more diverse range of uses going forward. As such, the NPPF advocates a more flexible policy framework to support the future vitality and viability of town centres.

3.3 NPPF policies are considered on a thematic basis below.

Plan-Making

3.4 Paragraph 20 of the NPPF indicates that development plans should set out an overall strategy for the pattern, scale and quality of development, including policies to deliver retail, leisure and other commercial development. Paragraph 31 states that the preparation and review of all policies should be underpinned by relevant and up-to-date evidence. This should be proportionate and take into account relevant market signals.

Building a Strong, Competitive Economy

3.5 Paragraph 85 of the NPPF indicates that planning policies and decisions should help create the conditions in which businesses can invest, expand, and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development.

Ensuring the Vitality of Town Centres

3.6 Paragraph 90 specifically relates to planning for town centres. It states that:

'Planning policies should:

a. define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
b. define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
c. retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
d. allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
e. where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be

identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and

f. recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.'

3.7 The requirement to plan to meet needs across a minimum ten-year period represents a change from the previous NPPF which required town centre needs to be met in full across the entire plan period.

3.8 In addition, it is notable that the NPPF Annex 2 Glossary fails to make any reference to the designation of primary and secondary frontages. Page 32 of the Government Response to the Draft Revised National Planning Policy Framework Consultation[11] indicates that, whilst the revised NPPF has removed the expectation in national planning policy that such frontages must be defined, this does not necessarily preclude authorities from doing so where their use can be justified. However, it is evident that the general intention is to provide for more flexibility through a less prescriptive approach to land use.

3.9 Paragraph 94 of the NPPF states that it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail and leisure development that should be the subject of an impact assessment. Any such threshold policy applies only to the impact test. All planning applications for main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will generally be the subject of the sequential test.

Promoting Healthy and Safe Communities

3.10 Paragraph 97 seeks to support the social, recreational, and cultural facilities and services communities need. The guidance states that planning policies and decisions should:

- plan positively for the provision and use of shared spaced, community facilities (such as local shops, meeting places, sports venues, open space, cultural buildings, public houses, and places of worship), and other local services to enhance the sustainability of communities and residential environments;
- take into account and support the delivery of local strategies to improve health, social and cultural well-being for all sections of the community;
- guard against the unnecessary loss of valued facilities and services, particularly where this would reduce the community's ability to meet its day-to-day needs;
- ensure that established shops, facilities, and services are able to develop and modernise, and are retained for the benefit of the community; and
- ensure an integrated approach to considering the location of housing, economic uses and community facilities and services.

Ensuring the Vitality of Town Centres Planning Practice Guidance

3.11 The Town Centres and Retail Planning Practice Guidance ('the Town Centres PPG') was published in July 2019 and thereafter updated in September 2020. It provides additional direction in respect of how retail and town centre planning policy should be applied in respect of plan-making and decision-taking. The Town Centres PPG affirms the Government's aspiration to support town centres in order to generate employment, promote beneficial competition and create attractive, diverse places where people want to live, work and visit.

3.12 Paragraph 004 of the Town Centres PPG indicates that a local planning authority's strategy for their town centres

[11] Published July 2018.

should include:

- The realistic role, function and hierarchy of town centres over the plan period. Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed.
- The vision for the future of each town centre, including the most appropriate mix of uses to enhance overall vitality and viability.
- The ability of the town centre to accommodate the scale of assessed need for main town centre uses, and associated need for expansion, consolidation, restructuring or to enable new development or the redevelopment of under-utilised space.
- How existing land can be used more effectively – for example, the scope to group particular uses such as retail, restaurant and leisure activities into hubs or for converting airspace above shops.
- Opportunities for improvements to the accessibility and wider quality of town centre locations, including improvements to transport links in and around town centres, and enhancement of the public realm.
- What complementary strategies are necessary or appropriate to enhance the town centre and help deliver the vision for its future, and how these can be planned and delivered. For example, this may include consideration of how parking charges and enforcement can be made proportionate.
- The role that different stakeholders can play in delivering the vision. If appropriate, it can help establish the level of cross-boundary/strategic working or information sharing required between both public and private sector groups.
- Appropriate policies to address environmental issues facing town centres, including opportunities to conserve and enhance the historic environment.

3.13 This Study seeks to provide a high-level authority-wide retail and leisure strategy, which will provide an overall context to the determination of planning applications for such uses and will support the Council's future development plan policy. The Study will also help underpin future town centre-specific strategies or masterplans.

3.14 Paragraph 006 of the Town Centres PPG identifies a series of key indicators of relevance in assessing the health of a centre over time. The indicators allow the role, performance, and function of centres to be monitored and are considered in greater detail at Section 5 of this report (which specifically addresses the vitality and viability of Manchester's principal centres).

Use Classes Order

3.15 Significant changes to the Use Classes Order have been enacted through the Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020, which came into force on 1 September 2020.

3.16 The amendments include the revocation of Parts A and D, and the introduction of three new Use Classes, these being Classes E, F1 and F2. The Government's objective is that the changes will support the revival of the high street and allow for greater flexibility in changing uses within town centres without the need for planning permission.

3.17 In addition to the three new Use Classes, the changes also result in some changes in respect of uses classified as *sui generis*. In practical terms, the changes comprise:

- **Use Class E** – Commercial, business and service uses include: shops or retail; cafes or restaurants; financial services; professional services; any service appropriate to provide in a commercial, business or service locality; indoor sports, recreation or fitness; medical or health services; crèche, day nursery or day centre; and offices.

- **Use Class F1** – Learning and non-residential institutions include any non-residential use for the: provision of education; display of works of art; museum; public library or public reading room; public hall or exhibition hall; for or in connection with public worship or religious instruction; or, as a law court.
- **Use Class F2** – Local community uses include: a shop selling mostly essential goods, including food, no larger than 280 sq.m and where there is no other such facility within 1,000 metres radius of the shop's location. A hall or meeting place for the local community, an area or place for outdoor sport or recreation and an indoor or outdoor swimming pool or skating rink.
- **Sui Generis** – Use within this Class now include a public house, wine bar or drinking establishment; a drinking establishment with expanded food provision; as a hot food takeaway for the sale of hot food where consumption of that food is mostly undertaken off the premises; live music venue; cinema; concert hall; bingo hall; or dance hall.

3.18 The introduction of Class E is significant and places a wide range of uses including retail, food, financial services, gyms, healthcare, nurseries, offices, and light industry into a single use class. Unless restrictive planning conditions extinguish the provisions of Class E, the ability to significant change the commercial use of premises without planning permission allows centres to evolve in a flexible manner.

3.19 However, the provisions of the Use Classes Order are not linked to any spatial considerations. As such, the expanded Use Class E applies equally to both town centres and out of centre locations, and there may be unintended consequences in providing for additional flexibility across Class E outside of town centres. Accordingly, it may be necessary for the Council to apply restrictive conditions to certain forms of development in order to restrict the authorised use to that which has been justified in the application submission. This will help ensure that unacceptable impacts do not arise from future Class E development.

Town Centre Use Permitted Development Rights

3.20 An amendment was made to the General Permitted Development) (England) Order 2015 (the 'GPDO') in March 2021. This allows for the change of use from Class E properties to residential from August 2021 (extending a right that had previously been restricted to office uses). This permitted development right is subject to maximum size requirements, the property having been in use as Class E for two years, and the property having been vacant for three months. In addition to this, 'prior approval' for the change of use must be sought from the planning authority. Restrictions on this right apply in conservation areas and for nurseries, as well as in areas that are covered by an Article 4 direction.

Local Planning Policy Context

Adopted Development Plan

3.21 The principal statutory development plan document is the Manchester Core Strategy, adopted July 2012 and the saved policies within the Manchester UDP, adopted in 1995.

3.22 The Core Strategy defines the authority area as the city centre itself and five separate regeneration areas.

3.23 **Manchester City Centre** is defined as the area insider the Inner Relief Route and extends to the south to encompass the Oxford Road Corridor. The city centre area also extends to Chapel Street, within the administrative boundary of Salford City Council. The city centre is sub-divided into a series of distinct areas which include the Central Business District, the Retail Core, Chinatown, and the Village.

3.24 The Core Strategy identifies that:

- the city centre has undergone significant change over the last decade with the rise of City Centre living and it is (and will remain) the largest driver of employment growth in the North West and the most significant focus for cultural activity and creativity in the north of England;
- the Central Business District is the focus for the largest regional concentration of financial and professional services in the UK and, along with areas such as Spinningfields and Central Spine, is crucial to providing a diverse commercial product;
- Manchester has been at the forefront of city centre living for the past 20 years which has now moved across the whole of the city centre;
- each area of the city centre has its own role and character, with particular quarters making a significant contribution to the evening economy.

3.25 **North Manchester** includes the six wards of Higher Blackley, Charlestown, Moston, Harpurhey, Cheetham and Crumpsall, together with the Collyhurst sections of Miles Platting, Newton Heath, Ancoats, and Clayton. There are two district centres serving North Manchester, these being Cheetham Hill and Harpurhey.

3.26 In respect of North Manchester, the Core Strategy indicates that:

- this area suffered through the departure of major employers in the 1970s and 1980s, but has in recent years benefitted from significant investment in the housing stock;
- the southern areas have traditionally been the subject of greatest deprivation but is now undergoing significant physical transformation, which includes the delivery of city centre-style apartment dwellings which provide good access to employment opportunities and Manchester's central cultural offer; and
- the northern parts of the area, namely Blackley, Charlestown, Crumpsall and Moston, remain the most desirable and have access to large areas of open space.

3.27 **East Manchester** grew and developed in the nineteen and early twentieth centuries in association with traditional manufacturing industries but subsequently declined as production methods changed. The Core Strategy identifies how, in the second half of the twentieth century, employment declined sharply and over a fifty year period the area's population decreased from 164,000 in 1951 to 62,000 in 2001.

3.28 This resulted in a significant amount of derelict land and buildings, low housing demand, and populations which could not sustain the same number of local facilities such as shops, post offices, banks or schools. In respect of East Manchester, the Core Strategy identifies that:

- since the establishment of the New East Manchester Urban Regeneration Company in 2001 has experienced substantial improvements in job creation, public services and the construction of new homes;
- the successful delivery of the 2002 Commonwealth Games has left a legacy of infrastructure at Eastlands and has acted as a catalyst for a comprehensive regeneration programme;
- Eastlands is both a district centre and the focus for major national and regional sporting events;
- Central Park is a growing employment site with its own dedicated Metrolink stop and supports major employers;
- in addition to Eastlands, the neighbourhoods of East Manchester are served by Openshaw, Gorton and Newton heath district centres, which generally have a strong grocery offer; and
- Newton Heath district centre has a more modest retail offer.

3.29 **Central Manchester** encompasses a range of diverse communities, from the disadvantaged to the well-off. Economic assets in the area include the University of Manchester and Manchester Royal Infirmary. Central Manchester is also well-located in respect of its proximity to Manchester city centre. Central Manchester covers the wards of Ardwick, Hulme, Longsight, Moss Side and Rusholme.

3.30 In respect of Central Manchester, the Core Strategy identifies that:

- the residential population includes a wide range of Black and Minority Ethnic communities and has developed a role as the first point of entry for immigrants to the city;
- there are localised areas of high housing demand and generally flourishing district centres;
- the central area has a high percentage of people under 25 across all ethnic backgrounds;
- some neighbourhoods are within the most deprived wards in the UK and, whilst areas such as Hulme have undergone considerable regeneration, there are still specific pockets of deprivation.

3.31 **South Manchester** is a largely residential area, providing a significant workforce for the City being within easy commuting distance of the city centre itself. It contains some of the most expensive residential property in Manchester, a higher proportion of affluent household relative to other parts of Manchester, and an above average proportion of the higher educated workforce.

3.32 The Core Strategy identifies that:

- Levenshulme and Withington neighbourhoods are focused around their respective district centres and they have developed around traditional settlements that are now conservation areas;
- the private rented and student neighbourhoods have historically been focused in Fallowfield and the northern part of Withington, where smaller terraces and student flats have met this housing needs;
- large-scale social housing dominates the neighbourhoods of Burnage and Chorlton Park as well as the western parts of both Withington and Fallowfield; the nature of these neighbourhoods is typically interwar garden suburb-style Council housing.

3.33 **Wythenshawe** and Manchester Airport for the southernmost part of the City. Wythenshawe was designed as a garden suburb and retains a predominantly residential character.

3.34 The Core Strategy identifies that:

- the Metrolink extension to Wythenshawe district centre provides an opportunity for it to strengthen its role as a focus for community and commercial activity;
- the Airport is the principal employment location for residents of Wythenshawe as well as an important employer for South Manchester and the adjoining Boroughs of Stockport and Trafford; and
- with the exception of Northenden, Brooklands and parts of Baguley, Wythenshawe has high levels of deprivation and all areas of Wythenshawe have worklessness figures that fall below national average level.

3.35 Section 4 of the Core Strategy sets out the 2027 Vision for Manchester. By this time, the City will *inter alia*:

- have a growing economy driven by the strength of the Regional Centre and Manchester Airport;
- support thriving district centres which have a distinct local character and provide a good range of accessible public services, retail, and local facilities; and
- an international destination for tourism and culture with the Eastlands area of the Regional Centre a national attraction for sport, leisure, and recreation.

3.36 Two Core Strategy Spatial Objective policies are of particular relevance to this Study.

3.37 Policy SO2 'Economy' seeks to support an improvement in the City's economic performance and reduce economic, environmental, and social disparities. Policy SO2 states that:

'The Regional Centre will continue to be the main focus for business, retail, higher education, leisure, cultural and tourism development, to further develop its role as the main employment location and primary economic driver of the City region.'

3.38 Policy SO4 'Centres' sets out an objective to deliver a network of distinctive, attractive, and high quality centres, strengthening local identity, and providing access to essential services and healthy food. The policy states that:

'Developments providing additional services and retail will be encouraged in the district centres where such development is consistent with the City's retail hierarchy. Particular emphasis will be given to development that helps to create distinctive local character.'

3.39 In terms of the city centre development strategy, Policy CC1 'Primary Economic Development Focus: City Centre and Fringe' identifies that the centre is expected to accommodate 33 hectares of employment growth. The policy anticipates that the city centre fringe will accommodate a further 25 hectares of employment development. The policy supports further growth in the Civic Quarter, Mayfield, Spinningfields/Granada, Oxford Road Corridor, and Piccadilly areas of the city centre.

3.40 Policy CC1 goes on to state that:

'Provision of a range of economic development uses, such as retail, leisure, entertainment, cultural and tourism facilities will be encouraged in the City Centre…to support the development of a vibrant employment location attractive to businesses, employees and visitors to the City Centre.'

3.41 Policy CC2 'Retail' outlines the anticipated level of future retail growth in the city centre at the time of the Core Strategy's adoption. It identifies that:

- a need for around 70,000 sq.m of additional comparison goods retail floorspace in the city centre between 2012 and 2027;
- within the city centre, comparison retail development will be concentrated within the defined primary shopping area;
- a need for a minimum of 4,500 sq.m of convenience goods retail development in the city centre between 2012 and 2027;
- the Council will support the development of foodstore provision to serve the city centre, prioritising locations which complement population growth and regeneration priorities; and
- the Council is particularly supportive of the growth of the independent retail sector.

3.42 Policy C1 'Centre Hierarchy' relates to the network of centres across the City. The defined hierarch is as follows:

- **Manchester city centre** is the focus for comparison retail together with commerce, culture, leisure and tourism across the City Region;
- **17 district centres** have an essential role in providing key services to the City's neighbourhoods including shopping, commercial, leisure, public and community functions; and
- **24 local centres** address small scale retail and day-to-day needs.

3.43 Policy C2 'District Centres' indicates that such centres should (between 2017 and 2027) accommodate approximately 20,000 sq.m of convenience goods floorspace and 15,000 sq.m of comparison goods floorspace. The policy goes on to state that in district centres:

- the delivery of key 'visitor' services will be prioritised, including retail, public and commercial services, and food and drink;
- retail will remain the principal use in primary shopping areas but provision will also be made for commercial and service uses, leisure and community facilities and other uses which make a positive contribution to the vitality and viability of centres;
- diversity will be encouraged where this does not erode centres' primary retail function; and
- choice and competition will be promoted, particularly where this supports the independent sector.

3.44 Policies C3 to C7 identify retail floorspace requirements for the five regeneration areas of North Manchester, East Manchester, Central Manchester, South Manchester, and Wythenshawe.

3.45 Policy C8 'Local Centres' indicates that local shopping and service provision in local centres should be retained where it remains viable and provides an important service to the local community. The provision of new small scale retail facilities will be encouraged where they would provide for local every day needs and would not be harmful to the vitality and diversity of nearby centres. Careful consideration will be given to the impacts of new commercial development on residential amenity, which is identified as being a particular issue for food and drink uses.

3.46 Policy C9 'Out of Centre Development' indicates that development of town centre uses in locations which are outside a defined centre will:

'…be inappropriate unless it can meet the following criteria:

- **There are no sequentially preferable sites, or allocated sites, within the area the development is intended to serve that are available, suitable and viable;**
- **The proposal would not have unacceptable impacts, either individually or cumulatively with recently completed and approved schemes and having regard to any allocations for town centre uses, on the vitality and viability of the City Centre and designated district and local centres. An assessment of impacts will be required for retail developments of more than local significance; and**
- **The proposal is appropriate in terms of its scale and function to its location.'**

3.47 Paragraph 10.56 of the policy's supporting text then identifies that the Council considers that development of less than 650 sq.m gross will generally be of local significance only (such proposals would not require a formal assessment of impact).

3.48 Policy C10 'Leisure and the Evening Economy' seeks to support leisure development where it contributes to the vitality of district centres and supports a balanced and socially inclusive evening/night-time economy. This is subject to:

- cumulative impact – in areas where there is already a concentration of bars, hot food takeaways and other night-time uses which are already detrimental to the character or vitality and viability of a centre, there will be a presumption against further facilities;
- residential amenity – the proposed use should not create an unacceptable impact on neighbouring uses in terms of noise, traffic and disturbance; and
- balance – new uses in Manchester centres should support both the daytime and evening/night-time

economies whilst not undermining the role of the primary shopping area.

3.49 When considering the impact of a proposed bar or hot food takeaway, account will be taken of the above policy and to:

- the existing number of similar establishments in the immediate area and their proximity to each other;
- the type and characteristics of other uses, such as housing, shops, and public houses;
- the existence of vacant shop units and the condition of the unit;
- the importance of the location for local shopping, and the number, function and location of shops that would remain to serve the local community;
- the character of the centre and its frontage, and the nature of the use proposed;
- the potential impacts of the proposal on the wider community; and
- any unknown resolved amenity, traffic or safety issues arising from existing uses in the area.

3.50 Although the majority of policies within the UDP were superseded by policies within the Core Strategy, extant Policy S1.2 designates the City Centre and district centre boundaries and is the starting point from which our recommendations in respect of boundaries are made later in this report.

3.51 Policy S1.2 states that:

'The Council in partnership with the private sector will encourage, where appropriate, the improvement and re-development of existing District Centres in order to ensure that they remain the focus for both shopping and a full range of community facilities. These centres comprise Cheetham Hill, Chorlton, Didsbury, the district centre in Sportcity, Fallowfield, Gorton, Harpurhey, Levenshulme, Longsight, Newton Heath, Northenden, Openshaw, Rusholme, Withington and Wythenshawe.'

Hot Food Takeaway SPD

3.52 The Council adopted the Hot Food Takeaway SPD in March 2017. The SPD seeks to encourage centres and neighbourhoods which are vibrant and which contribute to the Council's objective of improving the health of people living in Manchester.

3.53 Policy 1 of the SPD relates to the vitality and viability of centres and states that:

'Hot food takeaways (A5) will not be supported in district and local centres where the cumulative impact of introducing the facility would be detrimental to the vitality and viability of a centre and would affect the balance between the day time and night time economy and the health of the population.'

3.54 The Policy goes on to provide a range of criteria a proposal for new takeaway uses will be assessed against. In addition, the Policy states that:

'Exceptions to the above are Manchester City Centre and Rusholme District Centre. A key role of these centres is to serve the night time economy. They have become known as locations for food and drink, attracting visitors from across Greater Manchester and beyond. In these centres, hot food takeaway applications will be considered based on an assessment of the impact on the role and character of the surrounding area.

In centres where vacancy levels are more than 10% (or 25% in centres with less than 20 units) the Council will wish to see evidence that effort has been made to fill the unit with a town centre use (other than A5) before hot food takeaways will be permitted. In areas where it can be shown that it would be compatible with surrounding uses, residential use will be considered. Where there is evidence of no demand for a preferable use, hot food takeaways could be considered favourably even if this would increase the proportion of hot food takeaways to above 10% of ground floor frontages.

To prevent any harmful effect on the visual amenity of the street scene, shutters should be up between the hours 9am and 5.30pm.'

Emerging Development Plan: Places for Everyone

3.55 Places for Everyone is a long-term plan of nine Greater Manchester districts (Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Tameside, Trafford and Wigan) for jobs, new homes, and sustainable growth. It has been published by the GMCA on behalf of the nine districts.

3.56 The plan is a joint development plan of the nine districts which will determine the kind of development that takes place in their boroughs, maximising the use of brownfield land and urban spaces while protecting Green Belt land from the risk of unplanned development. It will also ensure all new developments are sustainably integrated into Greater Manchester's transport network or supported by new infrastructure.

3.57 The plan is the result of a process that began as the Greater Manchester Spatial Framework (GMSF) in 2014 and has been informed by the feedback received from residents, businesses and the development industry to previous consultations on that Plan. The nine districts decided to continue to produce a joint plan following the withdrawal of Stockport Council from the GMSF in December 2020.

3.58 There is a real aspiration within the Places for Everyone Modifications document to use key brownfield land for housing, including town centres, and seek to diversify their offers to meet residents' needs.

Emerging Development Plan: Manchester Local Plan

3.59 The Council undertook a public consultation exercise in respect of a new Local Plan between February and May 2020. This first step considered what the Local Plan should cover and is known as Issues Consultation stage.

3.60 The Issues Consultation splits the authority area into three key areas – the Northern Area, the Central Area (excluding the City Centre) and the Southern Area, providing key objectives for the broad areas. One of the key objectives for the district centres is to improve underperforming centres and ensure the character of centres is maintained.

3.61 We return to the above matters elsewhere in this report, most particularly within the concluding Section 10.

4. Market Research – In-Street Surveys

4.1 An 'in street' survey of users of Manchester city centre was undertaken by NEMS in February 2023 to understand how the city centre is used and identify those aspects of the centre that may benefit from improvement and change. To consider how the centre and users' perceptions of it have changed over time, some of the in street survey questions are identical to those that formed the previous May 2010 NEMS in street survey, which was undertaken as part of the Quantitative Retail Study Update of November 2010.

4.2 In total, 200 in street surveys were completed at five different locations in the city centre, these being:

i) St Ann's Square;
ii) Market Street;
iii) Exchange Square;
iv) King Street; and
v) Withy Grove (opposite the Arndale Centre).

4.3 The tabulated results of the in street survey are provided as Appendix 3. We provide a plan identifying the location of the in street surveys as Appendix 4. The surveys were scheduled in order to secure a variety of users; 97 surveys were undertaken on Monday, Tuesday, Wednesday and Thursday, 50 surveys were undertaken on Friday, and 53 surveys were undertaken on Saturday. Of the 200 respondents, 47% were men and 53% were women.

4.4 We set out an overview of the key findings of the survey below, focusing on customer satisfaction ratings, customer behaviour, and suggestions for improvement.

Purpose(s) of Visit

Main Purpose of Visit

4.5 Respondents were asked to identify the principal purpose of their visit to Manchester city centre. Table 4.1 identifies that the highest proportion of respondents indicated that their main reason was to visit the city centre was to visit non-food shops, and the second most popular response related to the respondent being in the centre for work.

4.6 Purchasing non-food goods was also the most popular answer to a comparable question asked in 2010 as part of the Quantitative Retail Study Update, reflecting Manchester's longstanding role as a key regional centre. However, the proportion of respondents who said non-food shopping was the principal focus of their trip has fallen from 38.4% in 2010 to 17.5% in 2023.

4.7 The decrease in respondents identifying non-food shopping as the main purpose of their visit is likely attributable to the diversification of Manchester's offer and the steep increase in its population in recent years. The city centre has gained approximately 20,000 new residents in the past decade (and is forecast to grow by a further 10% by 2025).[12] Over the same 10-year period, Manchester's population as a whole has increased by twice the average UK growth rate.[13]

4.8 The third most popular main reason for visiting the centre in 2023 was visiting food shops, which was identified by 15.0% of respondents. In contrast, only 3.1% of respondents gave the same answer in 2010 and it did not make the

[12] Manchester City Centre Business Improvement District, 2023-2028 Business Plan.
[13] Ibid.

top five most popular responses. Convenience goods shopping is generally undertaken as close to home as possible, and the emergence of this reason to visit again reflects the number of city centre residents.

4.9 In terms of other activity, 14.5% of the people surveyed said that the principal purpose of their visit was to go to a pub, café or restaurant. This finding shows the growing importance of food and beverage uses as a primary attractor of footfall to the city centre, as only 3.3% of those asked in 2010 stated that the main purpose of their visit was to eat or drink out (making this the sixth most popular answer in 2010).

4.10 A further 10.5% of those asked in 2023 stated that they were in the city centre to use an entertainment/leisure facility. This compares with just 8.3% of the 2010 respondents who said that their visit was for 'social' purposes.

Table 4.1: Main Reason for Respondents' Visits

Date	First	Second	Third	Fourth	Fifth
2023	Visiting non-food shops (17.5%)	Work here (17.0%)	Visiting food shops (15.0%)	Visiting pub/café/restaurant (14.5%)	Visiting an entertainment/leisure facility (10.5%)
2010	To buy non-food goods (38.4%)	Work / Business (14.6%)	Browsing (9.9%)	Social (8.3%)	To do Manchester Run (3.6%)

Source: 2023 NEMS In-Street Survey, Question 1; 2010 NEMS In-Street Survey, Question 1

Other Activities on Day of Visit

4.11 In addition to asking the main purpose of respondents' visits to the city centre, the in street survey also asked what else, if anything, visitors would be doing in Manchester on that day. Of those that provided an answer, the highest proportion of respondents (22.5%) identified that they would be visiting non-food shops. Table 4.2 identifies that the next most popular answers were: browsing (17.0%); visiting a pub, café or restaurant (15.5%); visiting food shops (11.5%); and visiting an entertainment/leisure facility (4.0%).

4.12 In 2010, only 22.3% of respondents failed to mention a second activity when asked; whereas in 2023, 31.5% of those questioned stated that they would be doing 'nothing else' in the city centre on the day of their visit. The fall in the proportion of visitors undertaking linked trips may be attributable to the increase in the city centre's residential population, which is likely to have increased the propensity/opportunities for short trips with a single purpose (e.g. grocery shopping).

4.13 Nonetheless, the responses from those who provided an answer to this question in 2023 suggest that a good proportion of users continue to link the main purpose of their trip to the centre with other activities, mainly shopping and leisure pursuits. The answers given are similar to those recorded in the Alyn Nicholls survey, although a significantly higher proportion of respondents stated that they intended to browse the centre in 2023 (17.0% of respondents, this being the second most popular response) compared to 2010 (10.6% of respondents, which was the fourth most popular response).

4.14 In 2010, answers relating to food and drink leisure purposes were separated into two categories, 'to buy food items in a café/restaurant etc.' (said by 12.9% of respondents) and 'eating or drinking out' (said by 12.3%). In order to achieve consistency between the surveys, these answers have been combined into one category for the purposes of Table 4.2 below, this being 'visiting pub/café/restaurant'.

4.15 Thus, the proportion of respondents visiting the city centre with the **secondary** purpose of visiting a food and beverage facility fell from 25.2% in 2010 to 15.5% in 2023. This finding needs to be understood in the context of the growing numbers of people who cited visiting a pub, café or restaurant as the **main** purpose of their visit, as outlined in Table 4.1 above, and the rising residential population in the city centre who are using Manchester to fulfil a more diverse range of day-to-day needs such as grocery shopping.

Table 4.2: Other Activities on Day of Visit

Date	First	Second	Third	Fourth	Fifth
2023	Visiting non-food shops (22.5%)	Browsing (17.0%)	Visiting pub/café/restaurant (15.5%)	Visiting food shops (11.5%)	Visiting an entertainment/ leisure facility (4.0%)
2010	Visiting pub/café/restaurant (25.2%)	To buy non-food goods (19.8%)	To buy food items (not takeaway, café, restaurant) (11.6%)	Browsing (10.6%)	To buy sandwiches / lunches etc. (not in a take-away, café, restaurant) (9.2%)

Source: 2023 NEMS In-Street Survey, Question 2; 2010 NEMS In-Street Survey, Question 2

Purpose of Visit

4.16 The 2023 survey then combined the answers to its Questions 1 and 2 to calculate the proportion of people visiting Manchester city centre for various purposes. The results of the same questions from the 2010 survey have also been aggregated together to identify changes in usage over time.

4.17 The results in Table 4.3 identify that non-food shopping continues to be the most frequently cited reason that respondents gave for visiting Manchester city centre. The proportion of respondents intending undertake comparison goods shopping on the day of their visit decreased from 58.2% in 2010 to 41.9% in 2023.

4.18 However, as explained above, the city centre's leisure offer has assumed greater importance as a footfall attractor in recent years. Again, for the purposes of Table 4.3, the responses falling into the 'eating or drinking out' and 'to buy food items in a café/restaurant etc.' categories used in the 2010 questionnaire have been combined into a single 'visiting a pub/café/restaurant' category to ensure consistency between the different surveys. Thus, In 2010, 28.5% of respondents stated that they were visiting Manchester to eat or drink out, whereas in 2023 this figure had increased to 31.4%.

4.19 The proportion of respondents who visit the city centre to shop for food and for work purposes has also increased significantly since the time of the Alyn Nicholls report. In 2010, 14.7% of those surveyed identified that they had visited the centre to purchase food items, whereas in 2023 the proportion was 27.7%. Similarly, 15.3% of respondents in 2010 identified that they were in Manchester city centre for work reasons, which has increased to 17.8% in 2023.

4.20 The in street survey findings indicate that Manchester continues to play a key role as a leading retail centre, particularly for comparison shopping. Nonetheless, convenience shopping is becoming an increasingly important component of Manchester's offer, as the number of city centre residents has grown exponentially.

4.21 The city centre's leisure function has increased significantly in importance since 2010, with food and drink uses seeming to drive this change. The research suggests that Manchester has managed to successfully diversify in response to the numerous, well-documented challenges to the retail sector in recent years.

Table 4.3: Purpose of Visit (Questions 1 and 2 Combined)

Date	First	Second	Third	Fourth	Fifth
2023	Visiting non-food shops (41.9%)	Visiting a pub/café/restaurant (31.4%)	Visiting food shops (27.7%)	Browsing (24.6%)	Work here (17.8%)
2010	To buy non-food goods (58.2%)	Visiting a pub/café/restaurant (28.5%)	Browsing (20.5%)	Work/Business (15.3%)	To buy food items (14.7%)

Source: 2023 NEMS In-Street Survey, Question 2X; 2010 NEMS In-Street Survey, Questions 1 and 2 combined

Spending Intentions

Purchases

4.22 Survey respondents were asked what they had bought or what they expected to buy during their visit to Manchester City Centre. Excluding those that said ‘nothing’ or ‘don’t know’, the five most popular answers are shown in Table 4.4.

4.23 The most frequently cited type of purchase in 2023 was food, groceries or off-licence alcohol sales, which was the answer given by 35.5% of those surveyed. This compares with the 22.2% of respondents who gave the same answer in 2010, again reflecting the growing significance of Manchester city centre’s convenience sector as its population has increased.

4.24 More than half of those asked about their purchases in 2010 (50.5%) said that they had bought or intended to buy clothing, whereas this figure fell to 28.5% in 2023. This result is likely influenced by national trends such as the growth in online shopping and potentially the cost of living crisis. However, comparison goods continue to be an important attractor of expenditure with leisure goods accounting for 12.0% of purchases in 2023 and household goods accounting for 8.5%.

4.25 A lower proportion of respondents said that they intended to purchase food or drink from restaurants bars or pubs in 2023 (21.0%) than in 2010 (33.7%). This finding is surprising, given that, as stated above, a slightly higher proportion of the 2023 respondents stated that the purpose of their trip to the city centre was to visit a pub/café/restaurant than those asked in 2010. The discrepancy may be part be attributable to the response not explicitly including café spend, which was included in the answers to Questions 1, 2 and 2X. The decline may also be a result of customers using food and beverage venues as meeting spaces but not actually buying meals or drinks, as the rising cost of living continues to cause customers to rein in non-essential spending.

Table 4.4: Purchases or Intended Purchases

Date	First	Second	Third	Fourth	Fifth
2023	Food/groceries/off-licence alcohol sales (35.5%)	Clothes & footwear (28.5%)	Food & drink at restaurants/bars/pubs (21.0%)	Leisure goods e.g. sportswear, books, toys, gifts (12.0%)	Household goods/hardware (8.5%)
2010	Clothes & footwear (50.5%)	Food & drink at restaurants/bars/pubs (33.7%)	Food/groceries/off-licence alcohol sales (22.2%)	Leisure goods e.g. sportswear, books, toys, gifts (9.5%)	Chemist goods (7.0%)

Source: 2023 NEMS In-Street Survey, Question 3; 2010 NEMS In-Street Survey, Question 3

Intended Expenditure

4.26 Those respondents who answered that they had bought, or expected to buy, food, groceries or off-licenced alcohol in the city centre were then asked how much they had spent, or expected to spend, in Manchester city centre shops on the day of their visit. Similarly, those who stated that they had bought (or anticipated buying) non-food goods were asked how much they had spent or intended to spend. Based on these answers, NEMS calculated a mean expenditure for both categories. The results are presented below in Table 4.5.

4.27 The 2010 survey asked the same questions relating to spending intentions, and mean expenditures were calculated for the food (£12.20) and non-food categories (£52.00). These prices have been converted to their equivalents in 2023 using Experian's Retail Planner Briefing Note 20 of February 2023, as shown in Table 4.5.[14]

Table 4.5: Expenditure or Intended Expenditure on a Sectoral Basis

Date	Food / Groceries / Convenience Items (£)	Non-Food Items (£)
2023	£22.22	£55.24
2010	£19.40	£64.72

Source: 2023 NEMS In-Street Survey, Questions 4 and 5; 2010 NEMS In-Street Survey, Questions 4 and 5

4.28 The table identifies that the mean amount of money that respondents anticipated to spend on food items has increased since 2010, even accounting for inflation. This finding is another indicator of the growing importance of the city centre's convenience sector.

4.29 Conversely, the mean anticipated expenditure on non-food items has decreased since the time of the Alyn Nicholls report once inflation is taken into account. Again, the reduction is probably due to wider UK trends including the growth of internet shopping, especially for larger purchases, and the rising cost of living.

Reason for Choosing Manchester City Centre

4.30 When asked why they chose to come to Manchester city centre on the day of the survey, the most popular response in 2023 was that it is close to home (cited by 31.0% of respondents). Table 4.6 identifies that a number of frequently cited responses relate to the centre's accessibility and convenience, including: good public transport (identified by 30.0% of respondents); close to work (27.0%); and close to friends/relatives (9.5%).

4.31 The other answers in the top five indicate that Manchester is perceived to have a good retail, leisure, and service offer. The joint third most popular response to this question was that there is a good range of shops/services (identified by 27.0% of respondents), and the fifth most popular related to the good range of food and drink outlets (12.5%).

4.32 For comparison, although many of the most popular responses to this question in 2010 survey related to accessibility, the percentages of respondents who gave answers of this nature were generally lower. Thus, only 25.7% of people in 2010 identified that they chose to visit Manchester because it was close to home, only 9.8% chose the centre because it was close to work, and only 6.3% cited good public transport.

4.33 The respondents' reasons for choosing to visit Manchester therefore point to a perception that the centre is well-provided for in terms of shops, services, and food and drink uses. The growing emphasis on the centre's accessibility most likely reflects not only the increased city centre population but also the improvements to its

[14] See Figure 7 of Experian's Retail Planner Briefing Note 20 (February 2023).

public transport network since 2010, notably the expansion of the Metrolink system to Oldham, Rochdale, South and East Manchester, Ashton-under-Lyne, East Didsbury and Manchester Airport.

Table 4.6: Reason for Choosing to Visit Manchester City Centre

Date	First	Second	Third	Fourth	Fifth
2023	Close to home (31.0%)	Good public transport (30.0%)	Good range of shops/services *and* Close to work (both 27.0%)	-	Good range of food & drink outlets (12.5%)
2010	Good range of shops/services (31.2%)	Close to home (25.7%)	Close to work (9.8%)	Attractive environment/nice place (6.8%)	Good public transport (6.3%)

Source: 2023 NEMS In-Street Survey, Question 6; 2010 NEMS In-Street Survey, Question 6

Duration of Visit

4.34 The NEMS survey of 2023 asked respondents about the duration of their trip to Manchester city centre, with the results provided in Table 4.7. The same question was not asked in respect of the 2010 Retail Capacity Study Update.

4.35 The most common duration of visit was between 2 and 4 hours, which was identified by 44.5% of respondents. Almost a quarter (24.0%) stated that they anticipated their visit would last between 1 and 2 hours, and 15.0% stated that they expected to stay in the centre for more than 6 hours.

4.36 Only 4.5% of respondents said that their visit would last less than an hour. The low proportion of short duration stays in the centre reflects the fact that Manchester has a very high propensity for linked trips, where visitors combine activities, such as shopping with the use of, for example, a leisure/cultural facility or service operators.

Table 4.7: Duration of Respondents' Visits

Less than an hour	Between 1 and 2 hours	Between 2 and 4 hours	Between 4 and 6 hours	Over 6 hours
4.5%	24.0%	44.5%	11.5%	15.0%

Source: 2023 NEMS In-Street Survey, Question 7

Frequency of Visits

Daytime

4.37 The 2023 survey also asked about the frequency of respondents' visits to Manchester city centre. Once again, this question was not asked as part of the 2010 in street survey.

4.38 Table 4.8 identifies that 41.0% of respondents identify that they visit the city centre more than once a week. The next most popular answer was monthly (17.5%), closely followed by less often/not regularly (16.5%), and then once a week (15.5%).

4.39 Accordingly, 82.5% of respondents visit Manchester city centre at least once a month, and well over half (56.5%) visit at least once a week. The high proportion of regular daytime visitors underlines that Manchester is well-provided for in terms of shops, services, leisure facilities, and other attractors.

Table 4.8: Frequency of Respondents' Visits to Manchester City Centre During the Day

More than once a week	Once a week	Once every 2-3 weeks	Monthly	Less often/not regularly	First visit today	Never
41.0%	15.5%	8.5%	17.5%	16.5%	1.0%	0.0%

Source: 2023 NEMS In-Street Survey, Question 8

Evening Time

4.40 Respondents were questioned about how often they visit the city centre during the evening. Table 4.9 identifies that Manchester is used less frequently during the evening compared to the daytime.[15] In this regard, 18.5% of respondents indicated that they visit the city centre in the evening once a week or more frequently, and a total of 48.0% indicated that they visit once a month of more. However, 27.5% of respondents stated that they never visit Manchester city centre in the evening.

4.41 The results generally underline Manchester's attraction in the evening and the frequency of visit is reflective of the range of things to do. However, there may be further scope to encourage those who are not visiting regularly (or not at all) to venture into the city centre in the evening.

Table 4.9: Frequency of Respondents' Visits to Manchester City Centre During the Evening

More than once a week	Once a week	Once every 2-3 weeks	Monthly	Less often/not regularly	First visit today	Never
7.0%	11.5%	12.0%	17.5%	23.5%	1.0%	27.5%

Source: 2023 NEMS In-Street Survey, Question 9

Mode of Travel

4.42 As set out below at Table 4.10, the proportion of trips to Manchester city centre using public transport or on foot has risen substantially since 2010. Correspondingly, car usage has fallen considerably.

4.43 The most popular mode of travel to city centre is by bus, which was the response provided by 22.0% of survey participants in 2023. The proportion of journeys made by bus has decreased since 2010, when it accounted for 31.6% of trips. The reduction in bus usage generally reflects national trends, but in Manchester this reduction corresponds with higher proportions of respondents travelling by tram (21.5% in 2023, compared to 7.2% in 2010), train (20.5% in 2023, 17.2% in 2010) and on foot (19.0% in 2023, 13.8% in 2010).

4.44 At the same time, the percentage of respondents who had made their journey to Manchester city centre by car on the day of the survey decreased substantially, from 28.4% in 2010 to 15.5% in 2023.

4.45 The increase in usage of sustainable transport modes, as opposed to private car journeys, is in line with both local and national policy aspirations. These trends are likely a reflection of improvements to Manchester's public transport network since 2010, especially the expansion of the Metrolink tram system, and a growing general recognition of the need to mitigate the effects of climate change. Numerous surface car parks in and around the city centre have also been developed in recent years, and the cost of car parking has generally increased significantly.

[15] It should be noted that this question was asked of those who were visiting the city centre during daytime hours.

Table 4.10: Most Popular Modes of Travel to Manchester City Centre

Date	First	Second	Third	Fourth	Fifth
2023	Bus (22.0%)	Tram (21.5%)	Train (20.5%)	Walk (19.0%)	Car/Van (as Driver or Passenger) (15.5%)
2010	Bus (31.6%)	Car (28.4%)	Train (17.2%)	Walk (13.8%)	Tram (7.2%)

Source: 2023 NEMS In-Street Survey, Question 10; 2010 NEMS In-Street Survey, Question 8

Car Parking

4.46 Respondents travelling by car were asked which car park they had used on the day of their visit. As no equivalent question was asked in the 2010 in street survey, it is not possible to provide a comparison in terms of how participants' parking habits have changed over time.

4.47 Among those respondents who were not dropped off in the centre and who remembered where they parked, the most popular answers were the Arndale (16.1%), Printworks (9.7%), and Great Northern car parks (6.5%). A number of different locations were also identified by a small number of the visitors surveyed.

Table 4.11: Where Respondent Parked

First	Second	Third
Arndale (16.1%)	Printworks (9.7%)	Great Northern (6.5%)

Source: 2023 NEMS In-Street Survey, Question 11

Length of Journey to City Centre

4.48 When asked about how long their journey to Manchester city centre took, the most frequently given response in 2023 was between 16 and 20 minutes, which was identified by 18.5% of respondents. As set out in Table 4.12, the next most popular answers, in order, were: 11 to 15 minutes (14.0%); 31 to 35 minutes (13.5%); 26 to 30 minutes (10.0%); and 21 to 25 minutes (9.5%).

4.49 Table 4.12 confirms that the proportion of respondents who travelled 30 minutes or less to visit the city centre has increased slightly since the 2010 Retail Capacity Study Update. In 2010, 57.3% of those surveyed said that their journey into Manchester took half an hour or less, whereas in 2023 the figure was 61.0%.

4.50 The fact that a high proportion of Manchester users live within a 30 minute journey time is indicative of a broadly accessible centre and offers a range of shops, services, and leisure attractions to suit the needs of local users.

4.51 Nonetheless, the fact that significant numbers are prepared to travel for some time (16.5% travelled for 46 minutes or more) is also reflective of Manchester's regional role.

4.52 The mean journey time in 2023, as calculated by NEMS Market Research, was 31.98 minutes. This is broadly consistent with the mean journey time recorded in 2010, which was 30.1 minutes.

Table 4.12: Duration of Journey to Manchester City Centre

Length of Journey (Minutes)	2023	2010
Less than 5 minutes	1.00%	4.00%
5-10 minutes	8.00%	12.30%
11-15 minutes	14.00%	13.20%
16-20 minutes	18.50%	18.40%
21-25 minutes	9.50%	9.40%
26-30 minutes	10.00%	0.00%
31-35 minutes	13.50%	15.50%
36-40 minutes	5.00%	7.70%
41-45 minutes	3.50%	4.50%
46-50 minutes	1.50%	1.90%
51-55 minutes	1.50%	0.50%
56-60 minutes	6.00%	5.20%
61-70 minutes	1.50%	1.00%
71-80 minutes	1.50%	0.50%
81-90 minutes	1.00%	1.20%
91-100 minutes	0.50%	0.50%
101-110 minutes	0.00%	0.20%
111-120 minutes	1.00%	0.80%
121 minutes plus	2.00%	3.10%
(Don't know)	0.50%	0.10%

Source: 2023 NEMS In-Street Survey, Question 12; 2010 NEMS In-Street Survey, Question 9

Likes, Dislikes and Suggested Improvements to Manchester City Centre

What Respondents Liked About Manchester City Centre

4.53 The 2023 survey asked respondents to identify what they currently liked and disliked about Manchester city centre (respondents were encouraged to cite multiple factors and the responses provided therefore do not sum to 100.0%). The 2010 survey did not ask about respondents' likes and dislikes.

4.54 As Table 4.13 identifies, the most liked attribute of the city centre is the range/quality of its leisure facilities, including cinemas and theatres, which was identified by 37.5% of respondents. The city centre's leisure offer also accounted for the third and fourth most frequently given answers, with 36.0% of people saying that they like the range/quality of places to eat and 26.0% identifying the range/quality of pubs and bars.

4.55 Participants also highlighted Manchester's range of shops/markets as something they liked, with this answer being the joint second most popular alongside the appearance or character of the centre (with both of these factors being identified by 36.5% of respondents). Almost a quarter (24.0%) of those asked said that they liked how the city centre was convenient located in respect of their home.

4.56 These survey answers underscore the growing importance of Manchester's leisure offer, as well as the continued influence of its strong retail market, on what brings people to the centre and how it is perceived.

Table 4.13: Most Liked Aspects of Manchester City Centre

First	Second	Third	Fourth	Fifth
Range or quality of leisure facilities (e.g. cinema, theatre etc.) (37.5%)	Appearance or character of the centre *and* Range of shops or markets (both 36.5%)	-	Range or quality of places to eat (36.0%)	Range or quality of pubs and bars (26.0%)

Source: 2023 NEMS In-Street Survey, Question 13

What Respondents Disliked About Manchester City Centre

4.57 Encouragingly, 28.5% of those surveyed said that there was nothing they disliked about Manchester city centre.

4.58 Table 4.14 identifies that, of those participants that did identify a characteristic that they disliked, 17.5% identified a perceived lack of cleanliness. This and other answers suggest a level of concern among some visitors with the city centre environment, both in respect of its appearance and perceptions of user safety. The fourth, fifth and sixth most frequently cited 'dislikes' were the safety of the centre (13.0%), its appearance or character (9.0%), and the presence of homeless people and vagrants (8.0%).

Table 4.14: Least Liked Aspects of Manchester City Centre

First	Second	Third	Fourth	Fifth
Nothing (28.5%)	Cleanliness of the centre (17.5%)	Congestion (17.0%)	Safety of the centre (13.0%)	Appearance or character of the centre (9.0%)

Source: 2023 NEMS In-Street Survey, Question 14

Suggested Improvements to Manchester City Centre

4.59 Respondents' suggestions in respect of how the city centre could be improved reflect some of the concerns summarised above. Table 8.15 indicates that the suggestion given most often by survey participants was to improve the quality and cleanliness of public spaces (32.0%).

4.60 The next most popular answer was that there was nothing particular to improve upon, which was cited by just over one in every five respondents (20.5%).

4.61 The third, fourth and fifth most frequently cited answers respectively related to: improved visitor information (16.0%); better public transport (12.0%); and different or better shops or markets (11.5%).

Table 4.15: Most Popular Suggestions to Improve Manchester City Centre

First	Second	Third	Fourth	Fifth
Improve quality and cleanliness of public spaces (32.0%)	Nothing in particular (20.5%)	Improved visitor information (16.0%)	Better public transport (12.0%)	Different or better shops or markets (11.5%)

Source: 2023 NEMS In-Street Survey, Question 15

Desired Changes to Specific Elements of Manchester City Centre's Offer

4.62 The next eight questions in the 2023 in street survey concerned specific elements of Manchester city centre's offer. Participants were asked what changes they would like to see in relation to a range of different factors. Once again, no equivalent questions were asked as part of the 2010 survey.

Shopping and Market Provision

4.63 When asked what changes they would like to see in terms of the shopping and market provision in Manchester city centre, 39.0% of the survey respondents did not identify any improvements indicating that a substantial proportion of Manchester's visitors are satisfied with the current retail offer.

4.64 As set out in the below Table 4.16, the most common positive improvement identified was that there should be more affordable shops, which was the response given by 29.5% of participants.

4.65 Several of the top five answers related to Manchester's markets: 19.5% of people said that they would like to see more frequent markets; 14.5% requested better quality markets; and 12.5% requested different types of markets (including specialist food and craft markets).

Table 4.16: Desired Changes in Terms of Shopping and Market Provision in Manchester City Centre

First	Second	Third	Fourth	Fifth
None (39.0%)	More affordable shops (29.5%)	More frequent markets (19.5%)	Better quality markets *and* More or new independent shops (both 14.5%)	-

Source: 2023 NEMS In-Street Survey, Question 16

Places to Eat and Drink

4.66 Similar results were apparent when respondents were asked about potential changes in respect of Manchester city centre's food and drink offer. Table 4.17 identifies that 41.5% of respondents did not mention any desired changes in respect of places to eat or drink, making this the most popular response to that question.

4.67 Of those that did name a desired change in Manchester's food and beverage offer, the most common answer related to the need for more affordable restaurants or cafés (this was identified by 24.5% of respondents).

4.68 The next most frequently given answers provided were: more opportunities to eat or drink outside (identified by 11.0% of respondents); more independent restaurants or cafés (9.0%); and better quality restaurants or cafés (8.0%).

Table 4.17: Desired Changes in Terms of Places to Eat or Drink

First	Second	Third	Fourth	Fifth
None mentioned (41.5%)	More affordable restaurants or cafés (24.5%)	More opportunities to eat or drink outside (11.0%)	More independent restaurants or cafés (9.0%)	Better quality restaurants or cafés (8.0%)

Source: 2023 NEMS In-Street Survey, Question 17

Leisure and Cultural Facilities

4.69 Manchester's leisure and cultural offer is perceived by most visitors to be performing well. As Table 4.18 identifies, most survey respondents (51.0%) could not identify a single change that they wanted to see in this regard.

4.70 The next most popular response related to a need for more or better entertainment for children and families, which was identified by 13.5% of respondents.

4.71 The rest of the top five responses to this question related to specific leisure or cultural facilities. Participants stated that they would like to see more or better art galleries (10.0%), museums (9.5%), cinemas or theatres (4.0%), and/or music or event venues (4.0%).

Table 4.18: Desired Changes in Terms of Leisure and Cultural Facilities

First	Second	Third	Fourth	Fifth
None (51.0%)	More or better entertainment for children/families (13.5%)	More or better art galleries (10.0%)	More or better museums (9.5%)	More or better cinemas or theatres *and* More or better music or event venues (4.0%)

Source: 2023 NEMS In-Street Survey, Question 18

Service Facilities

4.72 Most of the people surveyed (54.5%) also could not identify any change that they wanted to see in respect of the service facilities in Manchester City Centre.

4.73 Table 4.19 identifies that, of those that did specify a desired change, the most popular answers related to: more or better banking and financial services (12.0%); public services like libraries (8.0%); health services (7.5%); and public toilets (2.0%).

Table 4.19: Desired Changes in Terms of Service Facilities

First	Second	Third	Fourth	Fifth
None (54.5%)	More or better banking / financial services (12.0%)	More or better public services (e.g. libraries) (8.0%)	More or better public services (e.g. health) (7.5%)	More public toilets (2.0%)

Source: 2023 NEMS In-Street Survey, Question 19

Help and Information for Visitors

4.74 A greater proportion of respondents were able to identify proposed changes in respect of providing help and information for visitors to the city centre. In this regard, the most popular suggestion, as set out in Table 4.20, is improved signage (identified by 41.5% of respondents), followed by improved visitor information (30.0%).

4.75 Around one in five respondents (19.0%) did not provide any suggestion in respect of improvements in visitor help and information. The fourth and fifth most popular answers related to more or better information on history/architecture (14.0%) and more or better information in respect of travel options (6.5%)

Table 4.20: Desired Changes to Help and Inform Visitors to Manchester City Centre

First	Second	Third	Fourth	Fifth
Improved signage (41.5%)	Improved visitor information centre (30.0%)	None (19.0%)	More or better information on history/architecture (14.0%)	More or better information on travel options (6.5%)

Source: 2023 NEMS In-Street Survey, Question 20

Transport or Cycle Facilities

4.76 The most popular answer in respect of potential changes to transport or cycle facilities was that none were required. As identified by Table 4.21, 29.0% of respondents failed to identify the need for any improvements to transport or cycle infrastructure.

4.77 Cheaper car parking was the most popular proposed improvement, being suggested by 17.5% of survey respondents. The remaining answers in the top five broadly relate to the need for more sustainable transport modes, comprising: more frequent train services (14.0%); better cycle links (11.5%); and more frequent bus services (10.5%).

Table 4.21: Desired Changes in Terms of Transport or Cycle Facilities

First	Second	Third	Fourth	Fifth
None (29.0%)	Cheaper car parking (17.5%)	More frequent train services (14.0%)	Better cycle links (11.5%)	More frequent bus services (10.5%)

Source: 2023 NEMS In-Street Survey, Question 21

Quality and Cleanliness of Public Spaces

4.78 As identified by the below Table 4.22, 44.0% of respondents identified more green spaces as the principal change that they would like to see in respect of the quality and cleanliness of Manchester's public spaces. The second most popular answer was cleaner streets or parks (33.5%), followed then by the need for better routes and crossings for pedestrians (25.5%), a need for more bins (16.5%), and for less traffic/congestion (9.5%).

Table 4.22: Desired Changes in Terms of the Quality and Cleanliness of Public Spaces

First	Second	Third	Fourth	Fifth
More green spaces (44.0%)	Cleaner streets or parks (33.5%)	Better routes/crossings for pedestrians (25.5%)	More bins (16.5%)	Less traffic / congestion (9.5%)

Source: 2023 NEMS In-Street Survey, Question 22

Visitor Accommodation

4.79 The vast majority of survey participants (86.5%) answered that they did not know what kind of changes they would like to see to visitor accommodation in Manchester city centre.

4.80 Table 4.23 identifies that the most popular suggested improvement is the need for more affordable accommodation (identified by 12.5% of respondents). The three remaining answers given by those surveyed were each identified by a single respondent and related to a need for better quality accommodation, more signage, and more hotels.

Table 4.23: Desired Changes in Terms of Visitor Accommodation

First	Second	Third
Don't know (86.5%)	More affordable accommodation (12.5%)	Better quality accommodation *and* More signage *and* More hotels (All 0.5%)

Source: 2023 NEMS In-Street Survey, Question 23

What Manchester Does Better Than Other Places

4.81 The final survey question was 'what one thing does Manchester City Centre do better than other places that you visit?'. Table 4.24 identifies that the responses to this question were fairly diverse. The most popular response was Manchester's architecture/environment, which was identified by 27.5% of participants.

4.82 The remaining answers in the top five relate to Manchester's leisure and retail offer, with 21.0% of respondents identifying that Manchester is better than other places that they visit in terms of entertainment facilities, followed then by its shopping facilities (12.5%), its food and drink offer (6.5%), and its nightlife (6.0%).

Table 4.24: What Manchester Does Better Than Other Places

First	Second	Third	Fourth	Fifth
Architecture / Environment (27.5%)	Entertainment facilities (e.g. theatre, museums, cinemas, bowling etc.) (21.0%)	Shopping (12.5%)	Food / Drink (6.5%)	Nightlife (6.0%)

Source: 2023 NEMS In-Street Survey, Question 24

Summary

4.83 The in-street survey has gleaned a large amount of information relating to respondents' views, which can be fully understood through a review of the full results provided at Appendix 3. With regard to the purpose of this Study – which is to consider users' needs and identify locations to accommodate new main town centre uses – the following changes since 2010 are of particular relevance:

i) the contribution that Manchester's leisure offer makes to its attractiveness as a commercial destination has increased in importance over the past 13 years, with a much greater proportion of respondents identifying the city centre's food and drink offer as a primary attractor;
ii) concurrently, the role of non-food retail has diminished slightly (in line with national trends), with fewer respondents citing comparison shopping as the main reason for their visit and with these customers on average spending less money per visit on non-food goods;
iii) nonetheless, the city clearly retains an important regional role and its comparison shops continue to attract substantial numbers of visitors from a wide catchment area;
iv) the role of the city centre's food shops has grown in significance which reflects the very substantial increase in its residential population;
v) improvements to the public transport network – notably the expansion of the Metrolink to various parts of Greater Manchester – have resulted in a growing number of survey participants citing the centre's accessibility as a reason to choose Manchester for their visit;
vi) in addition, the proportion of visitors arriving via sustainable transport modes (including by tram, train and on foot) has risen substantially since 2010, with there being an associated reduction in the proportion of private car journeys into the centre; and
vii) the proportion of the city centre's visitors whose journey to the centre takes 30 minutes or less has increased slightly, and Manchester continues to draw trade from places as far as two hours away.

4.84 In addition, the 2023 in street survey has identified that:

i) the principal reason users visit Manchester city centre remains non-food shopping (which is unsurprising given its regional role) but a substantial proportion of visitors are also drawn to the centre by its food and drink offer and for work purposes;

ii) the vast majority of visitors (95.0%) stay in the centre for over an hour, reflective of Manchester's propensity to secure linked trips (where visitors combine activities such as shopping with the use of, for example, a leisure/cultural facility or service trader);

iii) the city centre also attracts a high proportion of regular daytime users, with 82.5% of respondents visiting at least monthly and 56.5% visiting at least once a week, suggesting that it is well-provided for in terms of shops, services, leisure facilities and other uses to suit the day-to-day needs of its users;

iv) the evening economy also generates a substantial level of regular trade, with 48.0% of survey participants stating that they visit Manchester City Centre in the evening at least once a month, although there is scope to increase this figure;

v) the most popular car park for survey respondents is at the Arndale;

vi) the aspect of the centre that survey respondents liked the most is the range/quality of its leisure facilities (including its cinemas and theatres), closely followed by its appearance and character, and the range and quality of its shops/markets, places to eat, and pubs/bars;

vii) those that disliked aspects of the centre most frequently cited its lack of cleanliness and congestion;

viii) improvements to the quality and cleanliness of public spaces are the most popular suggestion in respect of how Manchester city centre could be improved;

ix) in respect of what changes users would like to see to various elements of Manchester's offer, a substantial proportion of respondents to each question did not identify a specific change, but the most frequently cited requirements were for:
- more affordable shops;
- more affordable restaurants or cafés;
- more or better entertainment for children/families;
- more or better banking/financial services;
- improved signage;
- cheaper car parking;
- more green spaces; and
- more affordable visitor accommodation;

x) in respect of what Manchester does better than other places, survey respondents provided a diverse range of answers, reflecting the variation in what attracts people to the centre, with the city centre's architecture/environment, entertainment facilities and shopping facilities comprising the top three answers.

5. Market Research - Healthchecks

Introduction

5.1 Paragraph 90 of the NPPF indicates that planning policies should promote the long-term vitality and viability of town centres by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries. The same paragraph also states that town centres should accommodate a suitable mix of uses (including housing) and provide for development that reflects a centre's distinctive character.

5.2 Paragraph 006 of the Town Centres PPG identifies a range of indicators that should be assessed over time in order to establish the health of a town centre. The indicators include the following:

- diversity of uses;
- proportion of vacant street level property;
- retailer representation and intentions to change representation;
- pedestrian flows;
- accessibility;
- perceptions of safety and occurrence of crime;
- the state of town centre environmental quality;
- the balance between independent and national multiple retailers; and
- the extent to which there is an evening and night-time economy.

5.3 New healthcheck assessments have been undertaken for Manchester city centre and the district centres of:

1. Baguley
2. Cheetham Hill
3. Chorlton
4. Didsbury
5. Eastlands
6. Fallowfield
7. Gorton
8. Harpurhey
9. Hulme
10. Levenshulme
11. Longsight
12. Newton Heath
13. Northenden
14. Openshaw
15. Rusholme
16. Withington
17. Wythenshawe

5.4 The assessments are based on site visits which were undertaken in February 2023. These assessments should be taken as a 'snapshot' of the performance of each centre at a moment in time. We envisage that the high rate of inflation and other economic pressures at this time may impact on future operator representation and the healthcheck assessments should be viewed in this context.

5.5 The detailed healthcheck assessments are provided at Appendix 5. We provide a summary of the key conclusions from our healthcheck assessments below.

Manchester City Centre

5.6 The composition of Manchester city centre is set out at Table 5.1 below.

Table 5.1: Composition of Manchester City Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units (No.)	Units (%)	Units UK Average (%)
Comparison	134,270	22.0	30.1	510	25.3	26.9
Convenience	36,650	6.0	15.5	144	7.1	9.3
Financial Service	18,920	3.1	6.6	79	3.9	8.7
Leisure Service	320,870	52.6	26.3	907	44.9	25.4
Retail Service	6,310	1.0	7.2	42	2.1	15.8
Vacant	92,770	15.2	13.8	337	16.7	13.8
Total	**609,790**	**100.0**	**100.0**	**2,019**	**100.0**	**100.0**

Source: Composition of city centre based on boundary as defined by Experian Goad and derived from Nexus Planning survey of February 2023; Experian Goad national averages from Goad Report of February 2023.

5.7 Manchester city centre is the primary destination for shopping and leisure provision in the Greater Manchester area. The centre therefore provides a comprehensive offer, geared at the meeting the needs of those within the authority area, but also throughout the North West and the country as a whole.

5.8 The city centre comprises a number of distinct areas, these include:

- Northern Quarter and Ancoats - This area is known for its independent shops, bars, and restaurants and galleries. It is also home to street art and quirky architecture. The Ancoats area was once an industrial hub but has been transformed into a trendy neighbourhood with a vibrant food and drink scene. It's also home to several creative and tech companies.
- Spinningfields - This area is the commercial office heart of Manchester and home to many large companies, including law firms and financial institutions. It also has many high-end restaurants and bars.
- Castlefield - This area is known for its historic architecture, canals, and Roman ruins. It is a popular spot for walks and outdoor activities, a range of leisure operators, along with outdoor events in the summer.
- The Arndale Shopping Centre and Market Street Area - The Arndale Centre is a large shopping mall located in the heart of Manchester, with over 200 stores and restaurants. Market Street is a pedestrianised shopping street that runs through the city centre and is lined with shops, cafes, and street performers. The Arndale and Market Street area is known for its vibrant atmosphere and diverse range of shops, from high-end designer boutiques to budget-friendly retailers. Visitors can find everything from clothing and accessories to electronics and homewares, making it a popular destination for shoppers of all ages and budgets. There are also several cultural attractions in the area, including the Manchester Art Gallery and the Royal Exchange Theatre.
- St Ann's Square, Kings Street and surrounding area - features a variety of retail and commercial establishments and high-end fashion stores and luxury brands.
- Chinatown - This area is home to many Chinese restaurants, supermarkets, and shops. It also has an archway entrance and ornamental gates.

- Gay Village - This area is known for its vibrant LGBTQ+ community and nightlife. It has many bars and clubs that cater to the LGBTQ+ community.
- Piccadilly Gardens – Piccadilly Gardens is a popular meeting point and a hub for public transport in the city, with a tram stop, bus station, and train station all located nearby. The Gardens themselves are a green space surrounded by various buildings, including; hotels, restaurants, shops, and cultural attractions, the Manchester Art Gallery, the Royal Exchange Theatre, and the Arndale Centre shopping mall.
- Oxford Road Corridor - This area is home to several university buildings and cultural institutions, including the Manchester Museum and Whitworth Art Gallery. It also has many independent shops and restaurants.
- Deansgate - This area is known for its luxury shopping, high-end restaurants, and historic architecture. It's also home to the Beetham Tower, which is one of the tallest buildings in the UK outside of London.
- St. Peter's Square - This area is home to several important cultural institutions, including the Manchester Central Library and the Manchester Town Hall. It's also a major transportation hub with tram and bus connections.

5.9 The retail offer in the city centre is underpinned by a strong range of key national multiple operators, which are generally located in and around the Arndale Centre and Market Street. These locations provide a sizeable quantum of high quality, modern retail and wider commercial floorspace, and are accompanied by a range of restaurants, bars and cafés. Elsewhere in the city centre, independent and more specialist operators are situated in and around Exchange Street and King Street in particular and provide a unique retail and shopping experience.

5.10 Overall, it is considered that Manchester's comparison and convenience retail provision is strong and diverse. Notwithstanding these figures being somewhat below the national averages, particularly in terms of the proportion of floorspace, residents do have good access to larger food stores within proximity of the city centre, and access to a range of smaller national multiple and independent convenience operators within the centre itself.

5.11 The quantum of leisure uses in the city centre far exceeds the national average, both in terms of floorspace and units. Manchester benefits from a large number and diverse range of operators which reflect its role as a major national and regional centre.

5.12 Food and drink play a key role in attracting footfall and activity to the city centre and driving its evening economy. The greatest clusters of restaurants, bars and cafés are located within key areas such as Exchange Square, the Northern Quarter, Deansgate and Oxford Road.

5.13 In addition, the city centre provides for an excellent variety of large-floorplate leisure uses including theatres, cinemas, museums, art galleries, and other entertainment facilities. The existing AO area is an important facility for touring gigs and other attractions which draws visitors from across the North West. The new Aviva Studios (Factory) venue will lend further support to the arts and popular culture sector, encouraging the development of new complementary uses in the north-western part of the city centre alongside the River Irwell.

5.14 Indeed, Manchester is subject to significant planned investment, which includes the transformation of the Great Northern Warehouse at Deansgate into high quality office spaces and apartments, the repurposing of the former Debenhams and House of Fraser units and the redevelopment and improvement to Piccadilly Gardens. These developments have the potential to further enhance the city's image making it more attractive to businesses, investors and tourists.

5.15 These ongoing and planned investments help to contextualise the vacancy rates in Manchester city centre, which are higher than the relevant national averages (although broadly comparable to other large city centres across the country). Vacant units in the city centre include the former Debenhams unit on the corner of Market Street. This is a significant and high profile unit, and reflects the significant headwinds faced by the comparison goods sector in recent years. While there were a few vacancies noted within the Arndale, these were less pronounced than those throughout the rest of the centre. Therefore, ongoing monitoring should occur to the vacancy rates in the areas noted above.

5.16 In general, Manchester city centre is accessible to pedestrians, with significant provision of pedestrianised areas throughout the centre. Public transport is also readily available, providing connections at various points in the city centre to areas throughout Manchester and beyond.

5.17 The city centre has been subject to considerable investment in recent years, and the effect of this has been to improve the overall appearance of Manchester city centre into a largely attractive centre whose diverse cultural offer is considered likely to drive footfall throughout the day and into the evening.

5.18 Although there are some areas of the city centre which suffer from lower footfall and a lower environmental quality and perception of safety, overall, the centre is considered to be attractive, well maintained and safe.

5.19 Overall, we consider Manchester city centre to be vital and viable, with future investment and extant proposals being delivered that will further support its health into the future.

District Centres

5.20 We provide a summary of the vitality and viability of Manchester's district centres below.

Baguley District Centre

5.21 Baguley is a relatively new district centre focussed around the modern retail facilities located to the north (Brookway Retail Park) and south (Tesco Extra) of Altrincham Road. Baguley supports the fewest number of operators across Manchester's district centres, with just eight units in total. Whilst Baguley is characterised by large format retail units served by extensive surface car parking, it provides a strong day-to-day retail offer with three foodstores supplemented by the discount variety operator, B&M.

5.22 The centre is well located in respect of meeting the needs of residents of Baguley, Brooklands and north Wythenshawe. Its location on Altrincham Road means that it benefits from bus services which stop nearby.

Table 5.2: Composition of Baguley District Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units (No.)	Units (%)	Units UK Average (%)
Comparison	7,196	36.2	30.1	4	50.0	26.9
Convenience	12,816	61.3	15.5	3	37.5	9.3
Financial Service	0	0.0	6.6	0	0.0	8.7
Leisure Service	0	0.0	26.3	0	0.0	25.4
Retail Service	506	2.5	7.2	1	12.5	15.8
Vacant	0	0.0	13.8	0	0.0	13.8
Total	**19,888**	**100.0**	**100.0**	**8**	**100.0**	**100.0**

Source: Composition of centre derived from Nexus Planning survey of February 2023; UK Average from Experian Goad report of February 2023

5.23 Other than a petrol filling station associated with Baguley's Tesco Extra store, the entire focus of the centre is retailing. As a consequence, the land use composition of the district centre is skewed towards convenience and comparison retail, where the offer far exceeds the national averages in terms of both floorspace and proportions of units.

5.24 The district centre wholly comprises national multiple operators which are focused around meeting shopping needs. Although the number of units are limited, the scale of each operation is substantial. Baguley's Tesco Extra is the operator's largest format store and both its Aldi and Lidl foodstores are modern units which support the operators' full ranges of goods. B&M provides a strong day-to-day comparison goods offer, which means that the very large majority of grocery and household shopping can be undertaken at the centre.

5.25 Whilst the type of service providers which one would expect to see in a district centre (hairdressers, cafés, banks and so on) are generally absent, it should be noted that Tesco Extra's offer is extensive and that some traditional functions of a centre are incorporated within this use. For example, located within the store are a café, pharmacy, and bureau de change. The car park accommodates a Timpson shoe repair kiosk.

5.26 The vitality and viability of Baguley is consistent with the character of its component parts. It is in the format of a retail park with adjacent large format grocery stores. The centre is wholly occupied by national multiple operators and is fully occupied. Whilst the centre is limited by virtue of its character and limited service offer (albeit that the latter is supplemented by the range of services incorporated within the Tesco superstore), it is considered to be an important local facility. Furthermore, the centre commands high rents and market sale prices and is the subject of the lowest recorded yield of any district centre. It is therefore considered to be vital and viable.

Cheetham Hill District Centre

5.27 Cheetham Hill district centre serves an important convenience function for a localised catchment composed of residents of North Manchester and Salford (which lies a short distance to the west). Its main shopping street is Bury Old Road/Cheetham Hill Road, which contains a range of retail, leisure and service uses, typically within small-scale units. The pedestrianised Cheetham Hill Shopping Centre, which is located on the east side of Bury Old Road, provides for 26 modern retail units and is anchored by a Tesco superstore.

Table 5.3: Composition of Cheetham Hill District Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	4,036	15.1	30.1	19	17.6	26.9
Convenience	13,285	49.7	15.5	14	13.0	9.3
Financial Service	1,384	5.2	6.6	13	12.0	8.7
Leisure Service	4,807	18.0	26.3	31	28.7	25.4
Retail Service	1,626	6.1	7.2	19	17.6	15.8
Vacant	1,567	5.9	13.8	12	11.1	13.8
Total	**26,705**	**100.0**	**100.0**	**108**	**100.0**	**100.0**

Source: Composition of centre derived from Nexus Planning survey of February 2023; UK Average from Experian Goad report of February 2023

5.28 Cheetham Hill benefits from its strong provision of food retailers. Convenience representation far exceeds the typical levels recorded by Experian Goad. The centre's Tesco superstore on its own accounts for 58.3% of the recorded convenience floorspace, and this part of the offer is supplemented by a further three large supermarkets

(Worldwide Foods, Istanbul Supermarket, and Iceland) and a range of smaller foodstores, many of which are independent and reflect the ethnically diverse community in Cheetham Hill.

5.29 Due to the small-scale nature of much of its commercial stock and its role as a district centre, Cheetham Hill's leisure offer is focussed on food and drink uses in the form of cafés, restaurants, and takeaways. The majority of operators are independent, although there is representation from national multiples including Costa. These uses form the basis of the centre's evening economy, adding vibrancy and footfall until late into the night.

5.30 Although Cheetham Hill lacks some of the standalone comparison uses usually seen in a centre of this size (including a chemist), its offer is complemented by the broad variety of non-food goods sold from the larger foodstores, especially Tesco (which contains a pharmacy). Overall, the centre provides for a good range of retail and service uses that meets the majority of the day-to-day needs of its local community.

5.31 Cheetham Hill benefits from a low vacancy rate, especially in terms of floorspace, but there are prominent empty units scattered throughout the district centre that do somewhat detract from its environmental quality. In general, the environmental quality of the centre could be enhanced through measures to restore and improve poorly maintained shopfronts and buildings.

5.32 We understand that a Neighbourhood Regeneration Framework for Cheetham Hill will be prepared in 2024, funded by the Shared Prosperity Fund. This work will present further opportunities for investment and revitalisation of the centre.

5.33 Our overall conclusion is that Cheetham Hill is performing moderately well, but that improvements to its environmental quality, in particular, would help underpin its long term vitality and viability as a district centre.

Chorlton District Centre

5.34 Chorlton is a vibrant district centre in South Manchester which provides a distinct mix of largely independent shops, cafés, restaurants, drinking establishments and service uses. It has more units than any other district centre in Manchester and ranks third highest in terms of floorspace.

5.35 The primary catchment comprises the local wards of Chorlton, Chorlton Park and Whalley Range, but the centre's accessibility by bus and Metrolink, together with its unique offer and pleasant environment, attracts a substantial number of visitors from further afield.

5.36 The layout of the district centre is roughly cruciform, with the crossroads of Manchester Road/Barlow Moor Road (which runs north to south) and Wilbraham Road (which runs west to east) forming the main frontages.

5.37 Chorlton Cross Shopping Centre is a 1970s-style precinct in the western part of the centre and one of many prominent sites soon to be redeveloped to provide for hundreds of new homes, helping to sustain Chorlton's success as a shopping and leisure destination.

Table 5.4: Composition of Chorlton District Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	5,321	15.6	30.1	40	15.8	26.9
Convenience	5,758	19.4	15.5	27	11.1	9.3
Financial Service	1,507	4.4	6.6	16	6.3	8.7
Leisure Service	11,679	34.2	26.3	96	37.9	25.4
Retail Service	5,002	14.7	7.2	42	16.6	15.8
Vacant	4,011	11.8	13.8	31	12.3	13.8
Total	**33,278**	**100.0**	**100.0**	**252**	**100.0**	**100.0**

Source: Composition of centre derived from Nexus Planning survey of February 2023; UK Average from Experian Goad report of February 2023

5.38 Leisure is the most prevalent commercial use within the district centre, accounting for proportions of floorspace and units significantly above the UK averages. Indeed, Chorlton's array of independent restaurants, cafes, pubs and bars is one of its key strengths. The district centre has 84 independent food and drink outlets, with these operators being generally high-quality and catering for a diverse range of cuisines; hence the popularity of Chorlton as a food and drink destination for residents of South Manchester and further afield.

5.39 Chorlton is also above the national floorspace and unit averages in terms of its convenience provision. The largest foodstore and one of the key anchors for the district centre is Morrisons store on Wilbraham Road. Other national multiple food retailers within Chorlton include Co-op, M&S Food, Tesco Express, and Holland & Barrett. In addition, the centre benefits from an excellent range of independent convenience operators, including bakeries, butchers, a cheese shop, delicatessens, a fishmonger, greengrocers, off-licenses, and a sweet shop.

5.40 The majority of non-food retailers are independently operated, although there is representation from national multiples including Boots. The variety of comparison shops is good, with Chorlton having, among other things, a bookshop, two bicycle shops, clothing stores, furniture retailers and a florist. The centre is known for having a quirky and trendy retail offer.

5.41 Vacancy rates are moderately below the national averages, with many of the more prominent empty units, including those within the Chorlton Cross Shopping Centre and Chorlton Picture House, due to be redeveloped for housing in the short to medium term.

5.42 In terms of opportunities for improvement, Chorlton's public realm can feel disjointed, and traffic congestion and cluttered/uneven pavements may cause issues for those seeking to traverse the centre. We note that a public realm strategy is currently being prepared for Chorlton which will present opportunities to enhance pedestrian flows throughout the district centre. We also note that the new Manchester to Chorlton Walking and Cycleway, which was being implemented on the day of our fieldwork visit, is anticipated to alleviate some of these accessibility issues.

5.43 Overall, we consider that Chorlton is performing reasonably well in meeting the day-to-day needs of its local residents. The district centre is relatively vital and viable, with forthcoming residential developments, including the transformation of the outdated Chorlton Cross Shopping Centre, set to bring additional footfall and expenditure to the centre and build on its success as a shopping and leisure destination.

Didsbury District Centre

5.44 Didsbury is a well-connected and thriving district centre, lying within walking distance of rail and Metrolink stations and serving one of South Manchester's most affluent catchments. The main shopping frontages comprise Wilmslow Road, which runs from north to south, and Barlow Moor Road, which runs east to west.

5.45 The centre's success is underpinned by a strong convenience and service offer, with a good range of national multiples being supported by a diverse mix of high-quality independents, and a bustling leisure scene. Didsbury is renowned for its eclectic food and drink offer, with its award-winning restaurants and lively nightlife drawing visitors from across Greater Manchester. Numerous community events held throughout the year (including arts, beer and food festivals) contribute to the centre's overall vitality and viability.

Table 5.5: Composition of Didsbury District Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	2,489	15.3	30.1	26	19.5	26.9
Convenience	3,186	19.5	15.5	14	10.5	9.3
Financial Service	1,788	11.0	6.6	15	11.3	8.7
Leisure Service	5,984	36.7	26.3	48	36.1	25.4
Retail Service	1,845	11.3	7.2	24	18.0	15.8
Vacant	1,023	6.3	13.8	6	4.5	13.8
Total	**16,315**	**100.0**	**100.0**	**133**	**100.0**	**100.0**

Source: Composition of centre derived from Nexus Planning survey of February 2023; UK Average from Experian Goad report of February 2023

5.46 Food retail provision in Didsbury exceeds the national average in terms of both floorspace and units. The largest foodstore is the Aldi supermarket (1,269 sq.m), which is on the edge of the district centre as defined on the adopted Policies Map, but within the centre as defined by Goad. There is further national multiple representation from Co-op, M&S Food, Tesco Express, Holland & Barrett and Greggs. This is complemented by a range of small independent food retailers, with the offer including butchers, health foods, fishmonger, cheesemonger, and bakery/confectioner shops.

5.47 A key strength of the centre is its leisure provision; it provides for a range of high-quality national multiple and independent food and drink traders, with chain operators like Caffe Nero, The Botanist and Domino's sitting alongside a diverse mix of locally owned eateries and drinking establishments.

5.48 There is also an excellent variety of mostly independent non-food traders, including four clothing/fashion stores, two jewellers, a florist, a shop selling musical instruments, a shoe store, and a toy shop. This offer is supplemented by the range of comparison goods sold at the centre's larger supermarkets.

5.49 Vacancy rates are very low compared to the national average, with empty units generally being small in scale and not concentrated in any particular part of the centre. Moreover, the district centre's environment is generally pleasant, with attractive historic buildings and greenspaces helping to create a 'village' atmosphere.

5.50 Our overall conclusion with regard to the health of Didsbury is that it is a vital and viable district centre which is performing well in meeting the day-to-day needs of its catchment.

Eastlands District Centre

5.51 Eastlands district centre was created as part of the ongoing regeneration of East Manchester, which followed Manchester's successful bid to host the 2002 Commonwealth Games. The revitalisation of this part of the city has been driven by the creation of a globally competitive sport, leisure and recreation offer, beginning in 2002 with the development of the Etihad Stadium and Etihad Campus (formerly known as Sportscity). In the years since, successive regeneration frameworks and strong civic leadership have resulted in the physical, economic and social transformation of an area that was previously left derelict due to the effects of deindustrialisation and the decline of Manchester's traditional manufacturing industries.

Table 5.6: Composition of Eastlands District Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	3,607	18.8	30.1	2	11.8	26.9
Convenience	11,851	61.7	15.5	3	17.6	9.3
Financial Service	0	0.0	6.6	0	0.0	8.7
Leisure Service	3,031	15.8	26.3	9	52.9	25.4
Retail Service	397	2.1	7.2	2	11.8	15.8
Vacant	313	1.6	13.8	1	5.9	13.8
Total	**19,199**	**100.0**	**100.0**	**17**	**100.0**	**100.0**

Source: Composition of centre derived from Nexus Planning survey of February 2023; UK Average from Experian Goad report of February 2023

5.52 Eastlands is anchored by a large Asda superstore, which draws expenditure from both an extensive residential catchment and high numbers of tourists and visitors attracted to the area by nearby sporting events. Asda store accounts for almost all (98.5%) of the recorded convenience floorspace in the centre and offers a comprehensive range of goods. This provision is complemented by the smaller independent 'high street style' operators in the east of the district centre, with the other food retailers being a small convenience store and a bakery.

5.53 The largest comparison outlet is Decathlon (3,526 sq.m), which sells sporting goods, highlighting the role of the surrounding sports facilities in attracting footfall and spending. Asda also sells a broad range of non-food products.

5.54 Five of the nine recorded leisure units in Eastlands are independent takeaways based in the eastern part of the district centre, all of which measure less than 100 sq.m. The centre's national multiple food and drink operators (Starbucks and McDonald's) are located around the Asda store to the west. The biggest leisure unit in the centre is occupied by Flip Out, a large footprint trampoline and adventure park in the same terrace as Asda and Decathlon.

5.55 The services offer in Eastlands is more limited, reflecting its character and retail/leisure focus. Once again, the Asda superstore provides for some of the financial/business and retail service uses that would typically be seen in a district centre, including a bureau du change, opticians and a Timpson concession.

5.56 Eastlands contained just one vacant premises on the day of our survey, this being the former Natwest at the corner of Ashton New Road and Bank Street. This prominent empty unit is unfortunately located between the western and eastern 'halves' of the centre, contributing to a feeling of disjointedness. There is also a concentration of takeaways in the east of the centre which are shuttered during the day. Together, these factors may give the impression that vacancy rates in the district centre are high. In fact, the low floorspace and unit vacancy rates are a key strength of Eastlands.

5.57 Taking all of these factors into account, our overall conclusion is that Eastlands district centre is performing reasonably well, with its vitality and viability underpinned by the anchor Asda and nearby sporting facilities. There are opportunities to enhance connectivity between the west and east of the centre, including new signage and additional active street frontages, to encourage linked trips and allow the two 'halves' to become mutually reinforcing.

Fallowfield District Centre

5.58 Fallowfield's many eating and drinking establishments serve as a hub for student activity, particularly in the evenings. The district centre enjoys a substantial walk-in catchment, primarily drawn from nearby purpose-built student accommodation blocks, and also from the surrounding terraced houses, many of which have been converted to HMOs and are occupied by students in their second academic year onwards.

Table 5.7: Composition of Fallowfield District Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	515	2.3%	30.1%	2	2.8%	26.9%
Convenience	5,293	23.8%	15.5%	6	8.3%	9.3%
Financial Service	9,049	40.6%	6.6%	12	16.7%	8.7%
Leisure Service	6,589	29.6%	26.3%	43	59.7%	25.4%
Retail Service	535	2.4%	7.2%	6	8.3%	15.8%
Vacant	304	1.4%	13.8%	3	4.2%	13.8%
Total	**22,285**	**100.0%**	**100.0%**	**72**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of February 2023; UK Average from Experian Goad report of February 2023

5.59 Leisure uses, particularly pubs/bars and takeaways, dominate the centre. Thus, the percentage of floorspace in Fallowfield used for leisure purposes is only moderately above the national average, but its proportion of leisure units is more than double that of a typical UK centre. These findings reflect the fact that the majority of the district centre's units are occupied by small-scale food and drink traders. Most of these operators are independent, although there is representation from a range of national multiples. The offer is geared towards the surrounding population of young adults, with the centre serving as a hub for student activity in the evenings.

5.60 Food retailing is another key strength of Fallowfield's provision, with the centre's share of convenience floorspace being well above the national average. The district centre is anchored by its large Sainsbury's store, which attracts trade from a wide catchment drawn from locations across South Manchester and acts as a focal point. The supermarket is complemented by a decent range of grocery retailers catering primarily for the student population, including Wimmy Foods and a number of smaller convenience stores/off licences.

5.61 Conversely, the proportions of comparison retail floorspace and units are well below the relevant UK averages. Fallowfield contains just two non-food stores, both of which are fairly small in scale, although we note that the Sainsbury's store does sell a range of non-food products (including an Argos concession).

5.62 With regard to services, the apparent overprovision of financial and business services in Fallowfield compared to UK averages is mainly due to the presence of two large building supplies operations on Ladybarn Road. These uses are not typical of a district centre, and we subsequently suggest that their sites might provide a suitable opportunity for long-term redevelopment. The remaining financial and business services units are mostly occupied by estate/letting agents. Fallowfield has relatively few retail service businesses.

5.63 Vacancy rates in Fallowfield are far below the national averages. Moreover, the three vacancies identified on the day of our survey are small and overlooked day and night by active street frontages, so that they have limited negative impact on the look and feel of the district centre.

5.64 More generally, we understand that a Fallowfield District Centre Neighbourhood Management Framework is being prepared that will focus on hotspot interventions in the short term, identifying longer term improvement projects and establishing a public realm standard with a very strong emphasis on engagement and activation across all partners, stakeholders and community.

5.65 Our main conclusion in respect of the health of Fallowfield is that there are opportunities for improvement in relation to a number of factors, including: variety in the retail and service offer, public realm, traffic impacts, and perceptions of safety at night. Capitalising on these opportunities will help to build on the strengths of the district centre as a convenience retail and food/drink destination and enhance its overall vitality and viability.

Gorton District Centre

5.66 Gorton is an accessible district centre largely focussed around Hyde Road, a busy arterial route with connections to the M60 and M67 motorways. It is anchored by its Tesco Extra store and supported by Aldi and various specialist independent operators. Retail services play a secondary but nonetheless important role in meeting the basic day-to-day needs of Gorton's local residents. Gorton Market contributes to the diversity and vibrancy of the centre, with regular events driving footfall.

Table 5.8: Composition of Gorton District Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	3,831	13.9%	30.1%	14	15.7%	26.9%
Convenience	14,168	51.2%	15.5%	19	21.3%	9.3%
Financial Service	643	2.3%	6.6%	6	6.7%	8.7%
Leisure Service	2,423	8.8%	26.3%	16	18.0%	25.4%
Retail Service	4,984	18.0%	7.2%	24	27.0%	15.8%
Vacant	1,604	5.8%	13.8%	10	11.2%	13.8%
Total	**27,653**	**100.0%**	**100.0%**	**89**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of February 2023; UK Average from Experian Goad report of February 2023

5.67 Gorton chiefly functions as a convenience destination catering for the daily essentials of local residents. Thus, the district centre's proportion of food retail floorspace is more than three times the national average. Tesco in particular dominates Gorton's retail offer, being the key anchor and busiest part of the centre.

5.68 The district centre also far exceeds the national averages in relation to its level of retail service provision. There is a good range of services to meet the basic daily needs of its residential catchment, including numerous hairdressers, barbers and beauticians; opticians; undertakers; a phone repair shop and a tanning salon.

5.69 Conversely, Gorton has less representation in the comparison sector than a typical UK centre, with most of the non-food retailers being independent and the only national multiples being Lloyds Pharmacy and Age UK. Although it primarily hosts food traders, Gorton Market makes an important contribution in supplementing and diversifying the district centre's retail offer. The Tesco Extra store also stocks a broad range of comparison goods.

5.70 Leisure uses are less well represented in Gorton than in the rest of the country, particularly in terms of floorspace. The leisure service traders that are present are generally of moderate scale. There are two national multiple bookmakers (Betfred and Coral) and two national multiple fast food outlets (KFC and Subway). The remaining leisure operators are independent food and drink operators.

5.71 Owing to the small size of most of its commercial premises, Gorton district centre's floorspace vacancy rate is less than half the UK average. The proportion of vacant units is more in line with the national average, but still below. While the numbers are relatively low, the negative impacts of the identified vacancies are more apparent in the western part of the centre, where there is a prominent former car repair centre and clusters of unoccupied units on the south side of Hyde Road. Moreover, some of the shopfronts in this area are poorly maintained.

5.72 In its current state, our overall conclusion regarding the health of Gorton district centre is that there is opportunity for improvement across a number of key areas, especially relating to the comparison and leisure offers (including the evening economy) and the environmental quality of the centre. However, the recent and ongoing regeneration initiatives in the district centre are encouraging. The recently opened Gorton Hub has already begun to have a positive impact, improving the appearance of this part of Hyde Road and attracting a good level of footfall.

5.73 Moreover, the opportunity sites and catalyst projects identified in the approved Gorton District Centre Development Framework have the potential to transform the district centre and drive future economic growth. Thus, we anticipate that forthcoming investments and developments will address many of the issues highlighted in the healthcheck and enhance Gorton's vitality and viability over the medium to long term.

Harpurhey District Centre

5.74 The nucleus of Harpurhey district centre is its Shopping Centre, a purpose-built facility developed by St Modwen in partnership with Manchester City Council in the early 2000s, as part of a comprehensive regeneration scheme. The Shopping Centre contains a high proportion of national multiples and also houses the popular Harpurhey Market. The market plays an important role in supplementing and diversifying the district centre's retail provision, hosting a variety of independent traders selling a broad range of food and non-food products.

Table 5.9: Composition of Harpurhey District Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	6,572	22.3%	30.1%	13	26.0%	26.9%
Convenience	12,555	42.7%	15.5%	7	14.0%	9.3%
Financial Service	242	0.8%	6.6%	1	2.0%	8.7%
Leisure Service	3,371	11.5%	26.3%	14	28.0%	25.4%
Retail Service	2,815	9.6%	7.2%	6	12.0%	15.8%
Vacant	3,877	13.2%	13.8%	9	18.0%	13.8%
Total	**29,432**	**100.0%**	**100.0%**	**50**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of February 2023; UK Average from Experian Goad report of February 2023

5.75 Convenience retailing is by far the largest use in the centre in terms of floorspace. Indeed, Harpurhey's proportion of convenience floorspace is almost three times that of a typical UK centre. The district centre is anchored by an

Asda superstore that draws trade from a wide catchment, supported by Lidl and Iceland foodstores. In addition, the centre contains Harpurhey Market, which performs an important function within the district centre, both in meeting residents' needs and in differentiating its food (and wider retail) offer. Given that Harpurhey's overall vitality and viability is underpinned by its strong convenience sector, the Market is a key contributor to the district centre's health and plays a key role in attracting footfall.

5.76 The focus of the district centre's comparison offer is at the lower or value end of the market, with the majority of Harpurhey's non-food retailers being charity, discount and second-hand shops. Most of its comparison operators are national multiples, which occupy the modern, purpose-built retail units at Harpurhey Shopping Centre. This non-food shopping provision is supplemented by Indoor, Weekend and Mixed Markets, which sell a large variety of new and second-hand items. The Asda in the centre also sells a broad range of comparison goods which helps meet the daily needs of local residents.

5.77 Harpurhey's proportion of leisure floorspace is less than half the national average. However, this trend reverses with regard to the proportion of leisure units in the district centre, which is above that found in a typical UK centre. Harpurhey benefits from North City Family & Fitness, a leisure centre established and overseen by Manchester City Council. The food and drink sector includes national multiple representation from McDonald's, KFC and Subway, together with a number of independent cafes, two social clubs and a public house. There is a good range of leisure operators for a centre of this size, although the district centre lacks restaurants, other than the fast food outlets, which could stimulate an evening economy.

5.78 In terms of services, the centre would benefit from more diversity. There is only one financial and business services unit (Peasgood Solicitors). The retail services sector benefits from a post office, opticians, tanning studio and nail bar, but notably lacks any barbers or hairdressers. We recognise, however, the role that the Asda store and Post Office play in meeting some of residents' service needs.

5.79 Harpurhey's proportion of vacant floorspace is roughly in line with the national average, but its unit vacancy rate exceeds that of a typical UK centre. Concerningly, the unoccupied units are concentrated in the central part of Harpurhey Shopping Centre, which constitutes a main retail frontage, and some of them are fairly large and prominent. In addition, several of the vacancies were shuttered during the day, increasing the negative impact on the look and feel of the district centre.

5.80 Overall, we conclude that there is opportunity to improve Harpurhey's vitality and viability, especially with regard to its vacancy rate and the associated inactive frontages, especially in the evenings. Given the increasing importance of food and drink outlets in helping to support resilient centres, Harpurhey could benefit considerably from the introduction of new restaurants, or similar uses with longer opening hours, to encourage activity in all parts of the district centre and ensure feelings of safety and security at night.

Hulme District Centre

5.81 The current form and layout of Hulme district centre are the result of extensive regeneration works undertaken in the early 2000s. Hulme is one of Manchester's most compact district centres, having just 38 units, and comprises two distinct but well-connected 'halves'. Hulme High Street, to the west, comprises more 'traditional' linear retail and service frontages in the form of purpose-built modern units and a permanent Indoor Market hall. In the east, Hulme Retail Park provides for national multiple retail and fast food operators that trade from large 'retail warehouse' style units.

5.82 The most important retailer is the large Asda superstore, which anchors the centre and underpins its role as a convenience shopping destination. Asda draws trade from Hulme's reasonably large residential catchment and also from locations further afield such as Fallowfield, Whalley Range and the city centre.

Table 5.10: Composition of Hulme District Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	2,051	11.6%	30.1%	3	7.9%	26.9%
Convenience	7,485	42.4%	15.5%	8	21.1%	9.3%
Financial Service	369	2.1%	6.6%	3	7.9%	8.7%
Leisure Service	4,808	27.3%	26.3%	10	26.3%	25.4%
Retail Service	1,565	8.9%	7.2%	11	28.9%	15.8%
Vacant	1,362	7.7%	13.8%	3	7.9%	13.8%
Total	**17,640**	**100.0%**	**100.0%**	**38**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of February 2023; UK Average from Experian Goad report of February 2023

5.83 Hulme's proportions of convenience floorspace and units are well in excess of the corresponding national averages. The Asda superstore accounts for the majority of food retail floorspace in the centre and is the only national multiple, with the other foodstores being occupied by a range of smaller-scale independent retailers. The variety of food products available is good for a district centre of this scale, with representation from a fish and meat retailer, grocery store, health food shop, and off licence.

5.84 Conversely, Hulme has considerably less comparison retail provision than a typical centre in the UK. The vast majority of the identified non-food retail floorspace comprises the large format B&M store at Hulme Retail Park. The Outdoor Market also makes a limited contribution to diversity in the comparison sector. The small number of comparison retailers is partly due to the dominance of the Asda superstore, which sells a broad range of non-food goods such as clothing, electronics and pharmacy products. The relative under provision is likely also a consequence of Hulme's primary role as a convenience and service destination, with grocery shopping being the main purpose of a significant number of visits to the district centre.

5.85 Leisure provision in the district centre is slightly above the levels typically found in the UK. The largest leisure unit is the Moss Side Leisure Centre & Hulme High Street Library. The other leisure units in the centre are almost wholly dedicated to food and drink uses. Other than McDonald's, the offer is entirely independent and comprises cafés and takeaways, all located on Hulme High Street. While the takeaways operate late into the night, they do not draw significant numbers of people into the centre in the evening and, as a consequence, the western part of Hulme is quiet after dark. The high street would benefit from the introduction of uses such as restaurants, which open relatively late, in order to stimulate activity in this part of the centre after daytime hours.

5.86 Hulme is fairly well-provided for in terms of services, although it does not contain a bank or building society. All of the retail services operators are located on Hulme High Street and independently run. The provision is slightly lacking in diversity, largely comprising barbers, hairdressers and beauty operators.

5.87 Hulme's vacancy rates are significantly below the national average with respect to both floorspace and units. The vast majority of the unoccupied floorspace recorded is accounted for by the former B&M Bargains store within the indoor Market Hall (1,121 sq.m), which became vacant when B&M moved into the larger, adjacent unit at Hulme Retail Park. This prominent vacancy is being actively marketed to let for Class E uses at time of writing.

5.88 One the whole, we conclude that Hulme is a reasonably healthy district centre which is performing adequately in meeting the daily needs of its local residents.

Levenshulme District Centre

5.89 Levenshulme is one of Manchester's largest district centres, in terms of both units and floorspace. The centre is elongated in nature, being focussed around the busy Stockport Road (A6 corridor) and spanning 1.5km. It mainly performs a service and convenience role for the local community, with its offer being sufficient to meet the majority of basic day-to-day needs. Most of Levenshulme's retail operators are independent, catering for a broad range of specialist food products which reflect the ethnic diversity of the surrounding population, and there is representation from national multiple supermarkets (Tesco, Asda and Iceland).

Table 5.11: Composition of Levenshulme District Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	5,468	15.8%	30.1%	36	14.9%	26.9%
Convenience	5,499	15.9%	15.5%	32	13.2%	9.3%
Financial Service	5,777	16.7%	6.6%	44	18.2%	8.7%
Leisure Service	9,804	28.4%	26.3%	63	26.0%	25.4%
Retail Service	5,298	15.4%	7.2%	42	17.4%	15.8%
Vacant	2,656	7.7%	13.8%	25	10.3%	13.8%
Total	**34,502**	**100.0%**	**100.0%**	**242**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of February 2023; UK Average from Experian Goad report of February 2023

5.90 The proportion of convenience floorspace in Levenshulme is roughly in line with the national average. However, the district centre has more foodstore units than a typical UK centre. These figures reflect the fact that most of the commercial premises on Stockport Road are small in size. The centre's largest convenience retailer is a Tesco store of moderate scale, with the other national multiple foodstores being Asda and Iceland. Nonetheless, convenience provision in Levenshulme is dominated by independent retailers, which occupy about 91% of its food retail units. The range of convenience uses is good, including representation from bakers, butchers, convenience stores, fishmongers, grocers, a health food store, off licences and a sweet shop.

5.91 With regard to comparison uses, Levenshulme's proportions of floorspace and units are far below the corresponding national averages. The only national multiple non-food retailers are a small Cohen's chemist and The Children's Society charity shop. The other 94% of Levenshulme's non-food shops are non-multiples. These provide a good variety of comparison uses, albeit mainly skewed towards the lower end of the retail market. The offer includes clothing stores, discount homeware retailers, furniture and carpet shops, electronics and white goods stores, jewellers two gift shops. There are also four non-food traders specialising in cars and car accessories, reflecting the district centre's location along the busy A6 corridor.

5.92 In keeping with the other sectors, the leisure offer in Levenshulme overwhelmingly comprises independent operators. The majority of the leisure units are food and drink focussed, with the centre providing for 29 takeaways, 11 restaurants, 10 cafes, nine pubs/bars, and one fast food outlet. These uses contribute to an evening economy that brings activity to Levenshulme until the early hours of the morning. However, given that the late night operators are currently scattered throughout the elongated district centre, it would benefit from the concentration of night-time uses into a focal point or points. Greater focus would encourage these evening uses be mutually reinforcing and thus allow the evening economy to reach its full potential.

5.93 Although not reflected in the table above, Levenshulme also contains the Arcadia Library & Leisure Centre, which incorporates recreational uses including a swimming pool, steam room/sauna, gym and a fitness class studio. These amenities strengthen the district centre's overall leisure offer and provide larger-floorplate leisure uses which are otherwise lacking.

5.94 Service uses are over-represented in Levenshulme compared to UK averages. The mostly independent offer provides an excellent range of services to meet residents' daily needs, although there is no bank/building society.

5.95 Vacancy rates in Levenshulme are below the national averages and the unoccupied premises are all modest in size, so that there are no prominent large-scale empty buildings. There are, however, small clusters of vacant premises at various points in the Stockport Road frontage. Given that many of the centre's takeaways are shuttered during the day, the resulting concentrations of inactive frontages can give the false impression that parts of Levenshulme suffer from high vacancy rates, which is not the case. The centre could also benefit from better maintenance and/or the replacement of poor-quality signage on a significant proportion of its commercial premises.

5.96 Nevertheless, our overall conclusion on the health of Levenshulme district centre is that it performs well as a convenience and service centre that meets the majority of its residents' needs and is reasonably vital and viable.

Longsight District Centre

5.97 Longsight is mostly arranged around the crossroads of Stockport Road and Dickenson Road. The district centre's convenience offer is anchored by its Asda superstore and the newer Lidl supermarket, which benefit from both an extensive residential catchment and pass-by trade from the busy A6 corridor. Longsight Market also draws footfall to the centre, with its range of specialist operators reflecting the ethnic diversity of the local community. In addition, Longsight benefits from the newer public services buildings concentrated in its north, which are generally attractive and perform an important role for local residents.

Table 5.12: Composition of Longsight District Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	5,186	24.8%	30.1%	36	33.6%	26.9%
Convenience	9,680	46.3%	15.5%	14	13.1%	9.3%
Financial Service	1,120	5.4%	6.6%	11	10.3%	8.7%
Leisure Service	2,813	13.4%	26.3%	24	22.4%	25.4%
Retail Service	1,141	5.5%	7.2%	13	12.1%	15.8%
Vacant	988	4.7%	13.8%	9	8.4%	13.8%
Total	**20,928**	**100.0%**	**100.0%**	**107**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of February 2023; UK Average from Experian Goad report of February 2023

5.98 Longsight's proportion of comparison floorspace is less than that of a typical centre in the UK. However, the seeming under provision is primarily due to the small size of most of the district centre's non-food retailers, and its share of comparison units is well above the national average. With the exception of Shoe Zone, all of the comparison retailers present in Longsight are independently operated. A key focus of the offer is specialist fashion, especially South Asian-style clothing, and there is also representation from various retailers of furniture, carpets and white goods. The remaining non-food operators in the district centre mostly represent the lower or value end of the retail market, with several operators selling discount household goods and one charity shop.

5.99 Longsight Market contributes significantly to the retail diversity of the district centre. Among the non-food products available at the market are specialist Asian fabrics, clothing and jewellery, which draw customers from a wide catchment. It also sells general clothing and household goods. The Market also adds to the centre's strong convenience offer, selling fruit and veg, fish, meat, baked goods and confectionery. It draws footfall and trade to the centre through a variety of events across the year, including food fairs and holiday celebrations.

5.100 The proportion of convenience floorspace in Longsight is almost three times the UK average. In addition to the Asda and Lidl foodstores, there is national multiple representation from Farmfoods and Greggs. This is balanced with a good range of independent convenience retailers, including two butchers, a deli and greengrocers. Several operators specialise in Asian and Afro-Caribbean foods, including the Appna Continental Cash & Carry and the Manchester Superstore.

5.101 The proportion of commercial floorspace occupied by leisure uses in the district centre is around half the level of leisure floorspace provided in a typical UK centre. The proportion of units in leisure use is more in line with the UK as a whole but remains below average. Almost all of Longsight's 24 leisure operators are independent food and drink traders who generally occupy small units. Takeaways make up the biggest proportion of the district centre's leisure users (54%), followed by restaurants (42%), and then cafés (13%). These food and drink operators add vibrancy and contribute to the evening economy.

5.102 While below UK floorspace and unit averages, the centre's range of retail services operators is sufficient to meet most of the basic daily needs of residents, with representation from barbers, hairdressers, opticians and travel agents. Similarly, there is a good variety of financial and business services, including banks, a pawnbroker, estate agents, money exchange and a solicitor.

5.103 Longsight enjoys a low vacancy rate compared to the wider UK, both with regard to floorspace and units. Vacancies are generally small and dotted around Stockport Road, all to the north of its crossroads with Dickenson Road in the centre of Longsight. Due to their small size and the general busyness of the district centre, the impact of these vacancies is limited. There is, however, a small but somewhat prominent concentration of three vacant units at the corner of Dickenson Road and Rainforth Street which detracts from the street-scene in this area.

5.104 The key opportunities for improvement in Longsight relate to the quality of its public realm, which has been boosted by the development of the new public services buildings and the Slade Lane Community Gardens project, but which requires further intervention to ensure that the centre reaches its full potential. Another issue is the poor connectivity between the Asda store and Stockport Road, which means that currently the rest of the centre does not fully capitalise on the footfall attracted to the supermarket in the form of linked trips.

5.105 Nonetheless, Longsight benefits from high footfall and low vacancy rates, and on the whole the district centre is performing well in meeting the day-to-day needs of the local community. Our overall conclusion is that Longsight is reasonably vital and viable.

Newton Heath District Centre

5.106 Newton Heath is a relatively small district centre, comprising just 59 commercial units and 12,735 sq.m of commercial floorspace. Newton Heath is considered to provide relatively well for meeting the local catchment's day-to-day needs, particularly in respect of the convenience, leisure and retails service offer. Due to the presence of the Lidl, Farmfoods, Asda and Iceland stores within the district centre boundary, the proportion of convenience floorspace is considerably above the national average and performs a very important role within the centre.

Table 5.13: Composition of Newton Heath District Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	1,897	14.9%	30.1%	11	18.6%	26.9%
Convenience	5,698	44.7%	15.5%	10	16.9%	9.3%
Financial Service	714	5.6%	6.6%	4	6.8%	8.7%
Leisure Service	2,125	16.7%	26.3%	16	27.1%	25.4%
Retail Service	1,423	11.2%	7.2%	10	16.9%	15.8%
Vacant	878	6.9%	13.8%	8	13.6%	13.8%
Total	**12,735**	**100.0%**	**100.0%**	**59**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of February 2023; UK Average from Experian Goad report of February 2023

5.107 Newton Heath's offer is dominated by its convenience provision, with its proportion of commercial floorspace occupied by convenience retailers being almost three times the UK average. A total of ten units are occupied by convenience operators and key retailers include Lidl, Farmfoods, Asda and Iceland, amongst smaller convenience operators including an off licence, CTN and bakery.

5.108 In terms of the comparison offer, the centre's share of floorspace falls considerably below the national average. The proportion of comparison units is higher (although still well below the UK average), indicating that the units occupied by comparison operators are typically on the smaller side. In this regard, the largest comparison operator is Wynsors shoe shop, followed by First Choice Furniture, a second-hand furniture shop.

5.109 Newton Heath's share of leisure floorspace also falls considerably below the national average. However, the proportion of units occupied by leisure operators falls above the national average, again indicating that the sector principally occupies smaller units within the centre. In light of the district centre's role in principally providing for the day-to-day retail needs of the local catchment, the offer is primarily focused on serving the daytime economy. However, the centre does benefit from a relatively diverse leisure offer, including three public houses and a range of takeaways. Although the overarching food and drink offer is lacking somewhat in diversity, the presence of the public houses and takeaways does mean that there will be some activity into the evening.

5.110 Turning to financial and business services, the centre accommodates four operators, comprising a Lloyds bank, a solicitor and two security firms. The proportion of financial floorspace and units falls just below the national average in both cases.

5.111 With regard to retail services, Newton Heath has a good offer, providing ten operators over 1,423 sq.m of floorspace. In both cases, the proportion of floorspace and units occupied by retail services falls above the national average. Retail service operators include hairdressers, barbers, tanning shops, opticians and undertakers.

5.112 Newton Heath's vacancy rate in terms of floorspace is considerably below the national average, and in terms of units is just below the national average. The eight units identified as being vacant at the time of our visit are all relatively small in scale. The largest vacant unit is the former Music Hall, located on the southern tip of the district centre. The vacant units are scattered throughout the centre, although they are located predominantly to the south of the canal along Old Church Street.

5.113 Overall, we consider Newton Heath district centre to be reasonably healthy, with future opportunities to further enhance the offer through the development of the key sites identified in the full healthcheck at Appendix 5. The centre provides a good convenience offer which meets residents' needs, and a range of retail service operators. However, there are some opportunities to further diversify its offer, particularly through the provision of additional food and drink uses which could be supported in the future by the planned residential growth which will come forward as a result of the key development opportunities in the centre. More generally, we understand that a Neighbourhood Development Framework is to be prepared for Newton Heath and will be funded by the Shared Prosperity Fund. This work will present further opportunities for investment in and enhancements to the centre.

Northenden District Centre

5.114 Northenden comprises a linear centre in south Manchester which runs from south-west to north-east along Palatine Road. The wider Northenden area is bounded (in a triangular fashion) by Princess Parkway to the west, the M60 to the north-west, and Sharston Industrial Estate to the south. Whilst this geography shapes the centre's potential catchment area, Northenden supports a good range of retail and service providers, including local independent leisure service operators.

Table 5.14: Composition of Northenden District Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	2,290	16.4%	30.1%	14	14.3%	26.9%
Convenience	2,413	17.3%	15.5%	12	12.2%	9.3%
Financial Service	1,532	11.0%	6.6%	9	9.2%	8.7%
Leisure Service	4,324	30.9%	26.3%	33	33.7%	25.4%
Retail Service	2,607	18.7%	7.2%	22	22.4%	15.8%
Vacant	809	5.8%	13.8%	8	8.2%	13.8%
Total	**13,975**	**100.0%**	**100.0%**	**98**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of February 2023; UK Average from Experian Goad report of February 2023

5.115 Northenden has an important role in meeting day-to-day local needs. As such, it has a higher than average proportion of convenience goods retailers and a lower than average proportion of comparison goods retailers. The centre's share of comparison retailing equates to just over half the national average and the proportion of commercial units occupied by comparison goods retailers is also well below the UK average.

5.116 Comparison goods retailers are generally clustered in two locations. The first of these relates to the retail terrace between 320 to 364 Palatine Road. This location accommodates B&M Express, Pound Express and Well Pharmacy. The second concentration relates to the additional retail terrace which runs from 414 to 446 Palatine Road. These units include Mill Carpets and One Stop Party Shop.

5.117 Northenden's convenience goods offer is slightly greater than would be expected with reference to the national average position. In terms of proportion of floorspace, Northenden's convenience retailers account for more floorspace and units than in a typical UK centre. The largest convenience store is the Tesco Express on Palatine Road. Other national multiple food retailers within Northenden are Co-op and Go Local. The convenience goods offer also accommodates a number of independents.

5.118 Leisure is the most prevalent commercial use within the district centre, accounting for proportions of floorspace and units significantly above the corresponding national averages. Northenden's leisure service offer is focused around independent operators. There is a particularly good range of cafes (four in total), restaurants (seven) and takeaways (12) available, with most cuisines covered. The centre also accommodates the Northenden Players Theatre, which operates out of small premises on Church Road. National multiple leisure service operators include Betfred, Costa, Subway and William Hill.

5.119 Northenden also has a strong retail service offer, with the proportion of retail service floorspace also well above national average level. The proportion of retail service units is more in line with the rest of the UK, but still above the national average. Northenden provides a goods range of retail services, including barbers, hairdressers, opticians, vehicle repair garages, a post office, nail bar, and tanning salon. Financial and business services provision is also above the national floorspace and unit averages. Four of the nine financial and business service operators are solicitors.

5.120 The vacancy rates in Northenden are significantly below the UK national average levels in terms of both floorspace and units. The limited vacancies are scattered throughout the centre and do not unduly impact on its character. The unoccupied units are generally small in scale.

5.121 Northenden is an important district centre meeting the day-to-day needs of a relatively localised catchment. It has a good range of shops and service and has few vacancies. It is considered to be a vital and viable centre.

Openshaw District Centre

5.122 The Manchester Core Strategy Proposals Map defines Openshaw as a linear centre wholly comprising of properties situated on Ashton Old Road. In practice, we do not believe that this definition correlates with the area which is being used as a centre. In our view, Lime Square Retail Park, which opened in 2010 and lies immediately adjacent to the defined boundary, functions as part of the district centre. On this basis, we consider that Openshaw is medium-sized district centre in terms of commercial floorspace supported. Whilst the centre has fewer different uses than some district centres, this reflects the character of Lime Square and the significant footprints of its B&M, Morrisons, Poundland and other stores.

Table 5.15: Composition of Openshaw District Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	7,366	32.3%	30.1%	15	21.7%	26.9%
Convenience	8,484	37.2%	15.5%	11	15.9%	9.3%
Financial Service	584	2.6%	6.6%	5	7.2%	8.7%
Leisure Service	2,538	11.1%	26.3%	15	21.7%	25.4%
Retail Service	3,387	14.9%	7.2%	18	26.1%	15.8%
Vacant	447	2.0%	13.8%	5	7.2%	13.8%
Total	**22,806**	**100.0%**	**100.0%**	**69**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of February 2023; UK Average from Experian Goad report of February 2023

5.123 The Morrisons superstore comprises the largest anchor unit within Lime Square Retail Park and the Lidl store unit is located a short distance away to the south of Ashton Old Road. The convenience goods offer is supplemented by a Farmfoods supermarket (also part of Lime Square) and by a range of smaller stores which include further national multiples and independents. Given the level of large format provision, the convenience goods offer in the centre is proportionately strong compared to the national average position.

5.124 In terms of Openshaw's comparison goods offer, key retailers include the homewares and discount variety operators, The Range, B&M bargains and Poundland. This is supplemented by charity shops, chemists, a card shop, a florist, a pet shop and a carpet shop. The emphasis is on meeting day-to-day and household comparison goods needs. The proportion of units and floorspace dedicated to comparison goods use is above national average position. In total, nearly 70% of floorspace in the centre is dedicated to retail use.

5.125 The dominant service sector is retail services, with such uses accounting for proportions of floorspace and units substantially above the corresponding national average figures. The retail service sector comprises a good range of useful operators, including three hairdressers, two barbers, two beauty salons, two opticians, a gym, nail bar, Post Office, and so on. The largest retail service unit by far is The Gym Group, which is located at the south-eastern corner of Lime Square Retail Park.

5.126 Openshaw's leisure service sector is more modest, and below national averages in respect of floorspace and units. Of the 15 operators present, there are six takeaways, three bookmakers, three pubs, two cafes and a restaurant (this being McDonald's). The number of cafes and restaurants is very limited, albeit this perhaps reflects the character of the centre which is split between the Lime Square Retail Park units and the more traditional units on Ashton Old Road. Neither location perhaps provides the ideal setting for café and restaurant uses to thrive.

5.127 Just five vacant units were recorded during our visit, which is well below the UK average in terms of proportions of units and especially floorspace. The position in respect of vacancies is extremely encouraging and reflects the strong retail function of the centre and the apparent good performance of Lime Square Retail Park. The vacancies which are apparent are generally located in a sporadic manner on Ashton Old Road. The exception is to this is the former Openshaw Community Church premises which are located on Fairfield Road.

5.128 Whilst there is a good level of activity in the centre, its attractiveness is impacted by the volume of traffic along Ashton Old Road and the maintenance and quality of some older properties adjacent to the road. It will be important for Openshaw to attract additional investment and redevelopment in order to improve the fabric of the centre and create further activity. Notwithstanding the need for further investment and visual improvement, Openshaw is considered to be a vital and viable centre.

Rusholme District Centre

5.129 Rusholme district centre is a linear centre focused around Oxford Road, leading into Wilmslow Road. The centre's composition is dominated heavily by its leisure offer and is known as the 'Curry Mile' to both locals and those visiting from further afield. The district centre is busy both during the day and into the evening and draws trade from the local population, which comprises a mix of residents and students, and the wider area.

Table 5.16: Composition of Rusholme District Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	4,570	16.0%	30.1%	36	18.2%	26.9%
Convenience	5,208	18.3%	15.5%	19	9.6%	9.3%
Financial Service	999	3.5%	6.6%	12	6.1%	8.7%
Leisure Service	13,668	47.9%	26.3%	98	49.5%	25.4%
Retail Service	2,559	9.0%	7.2%	21	10.6%	15.8%
Vacant	1,510	5.3%	13.8%	12	6.1%	13.8%
Total	**28,514**	**100.0%**	**100.0%**	**198**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of February 2023; UK Average from Experian Goad report of February 2023

5.130 Rusholme's mix of uses very much reflects the local population and its demographics, and the focus is on providing a specific retail and food and drink offer to meet local demands. Indeed, leisure uses – particularly restaurants, cafes and takeaways – dominate the centre with approximately 50% of the total of units and floorspace. Whist they contribute to the vibrancy of the night-time economy, the proliferation of food and drink uses has led to a lack of diversity in the remainder of the district centre's offer, particularly with regard to comparison retailing.

5.131 In terms of the comparison offer, Rusholme's proportions of both floorspace and units fall below the national averages. The largest comparison unit is the Charlie Wilson car showroom, followed by the Poundland discount store. Other comparison operators include Asian specialist jewellers and clothing operators focused on Asian attire.

5.132 The convenience goods provision is broadly comparable to the national average in terms of units but above the national average in terms of floorspace. There are a range of speciality convenience operators focusing on the Asian market, including the Manchester Superstore and the Worldwide store. There is also a Lidl, Co-op foodstore and a Tesco Express.

5.133 The percentage of floorspace and units in Rusholme occupied by leisure operators is significantly above the national averages. Most of these operators are independent, although there is representation from national multiples including Caffè Nero and a Tim Horton's. The evening offer of Rusholme is very strong, with the 'Curry Mile' attracting a mixed catchment from both the surrounding streets but also the wider area. A number of restaurants and bars open until the early hours of the morning, also serving the local student population.

5.134 With regard to services, the centre's provision of retail services is higher than the national average in terms of floorspace. However, the number of units falls below the UK average, indicating that there are a number of retail service providers within larger units. The percentage of floorspace used for financial and business services falls below the UK average. The financial and business offer within the district centre is focused around solicitors which comprise 50% of the units, with additional pawn brokers, currency exchange services and estate agents.

5.135 The vacancy rate in Rusholme is well below the national averages in respect of both floorspace and proportion of units. The vacant units identified are scattered throughout the centre, with no major concentrations. One key vacant unit is situated on the southern edge of the district centre boundary, this being the former Hardy's Well pub which was demolished following a fire and which represents a development opportunity.

5.136 Our overall conclusion with regard to the health of Rusholme is that it is a vital and viable district centre which is performing well in meeting the day-to-day needs of its catchment. The daytime economy is underpinned by a strong convenience and service offer, with a number of national multiples balanced by a diverse range of mainly speciality independent convenience and comparison operators. The evening economy is also a significant draw, with the centre being renowned for its eclectic mix of restaurants, cafes, pubs and bars, some of which open until the early hours of the morning. This further supports the adjacent student population.

Withington District Centre

5.137 Withington district centre is an 'L-shaped' centre focused around commercial units on Wilmslow Road and Copson Street. The centre's composition is dominated by its leisure service offer, which has historically serviced an extensive young professional and student population. The leisure service offer is principally focused around cafés, restaurants, and takeaways (rather than licensed premises). In retail terms, Withington has an important role in meeting day-to-day local needs.

Table 5.17: Composition of Withington District Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	2,092	18.1%	30.1%	18	18.4%	26.9%
Convenience	2,068	17.9%	15.5%	11	11.2%	9.3%
Financial Service	1,175	10.2%	6.6%	11	11.2%	8.7%
Leisure Service	3,746	32.4%	26.3%	32	32.7%	25.4%
Retail Service	1,504	13.0%	7.2%	17	17.3%	15.8%
Vacant	964	8.3%	13.8%	9	9.2%	13.8%
Total	**11,549**	**100.0%**	**100.0%**	**98**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of February 2023; UK Average from Experian Goad report of February 2023

5.138 Withington has a higher than average proportion of convenience goods retailers and a lower than average proportion of comparison goods retailers. The largest convenience store is the Co-op (899 sq.m gross). Other multiple convenience goods retailers within Withington are Sainsbury's Local, Go Local and Martins (the latter being a regional chain). The convenience goods offer also accommodates a good number of independents including Withington Fruit n Veg, the No1 Plug tobacconist and Nassar Halal Meat.

5.139 The comparison goods function of the centre is relatively modest. In total, the floorspace used for comparison retailing equates to just over half the national average. Similarly, the percentage of commercial units occupied by comparison goods retailers is below the UK average figure. Other than some national multiple charity shop operators, such as Oxfam and Cancer Research, the offer is wholly independent and includes chemists, discount shops, a clothes store, jewellers and DIY/kitchen retailers.

5.140 Leisure service is the single most prevalent use within the district centre, with Withington's proportion of leisure floorspace and units being significantly above UK averages. The district centre's leisure service offer is focused around independent operators. There are a good number of cafes, takeaways and restaurants. The evening economy is boosted by the takeaways which generally open late. It should be noted that the evening economy is principally focused around eating (whether that be on the premises or takeaway) and that there are few licensed premises. Just two pubs – The Albert and The Victoria, both of which are on Wilmslow Road – are located within the centre.

5.141 Withington also has relatively strong retail service offer, with the proportion of retail service floorspace also well above national average level. The proportion of retail service units is closer to the national average level. Withington provides a goods range of retail services, including barbers, hairdressers, opticians, a post office, nail bar, and a tattooist. Financial and business services also account for proportions of floorspace and units above the corresponding national average figures. Six of the 11 financial and business service operators are estate agents which reflects the strength of the local property market and in particular the high number of rental properties in this part of south Manchester.

5.142 The vacancy rate in Withington is relatively low, with the proportions of unoccupied floorspace and units below the respective UK national average level. There are a total of nine vacant units which are generally small in scale and dispersed throughout the centre and do not unduly impact on its character and attraction.

5.143 Withington is well used both during the day and into the evening, which reflects the local demographic and the leisure uses supported. The overall function of the centre is boosted by the library on Wilmslow Road, the Co-op foodstore and Withington Baths (which is located a short distance outside the boundary). The centre provides an important range of goods and services. It is considered to be generally vital and viable.

Wythenshawe District Centre

5.144 Wythenshawe accommodates 113 commercial units and a total of 42,626 sq.m of commercial floorspace. As such, it is one of the larger district centres in the authority area, particularly in terms of the level of commercial floorspace. The centre provides a good retail offer meeting the local catchment's needs, principally focused on convenience and the discount comparison provision.

Table 5.18: Composition of Wythenshawe District Centre as at February 2023

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	14,858	35.6%	30.1%	33	29.5%	26.9%
Convenience	6,089	14.6%	15.5%	13	11.6%	9.3%
Financial Service	1,203	2.9%	6.6%	7	6.3%	8.7%
Leisure Service	8,048	19.3%	26.3%	15	13.4%	25.4%
Retail Service	3,867	9.3%	7.2%	13	11.6%	15.8%
Vacant	7,712	18.5%	13.8%	31	27.7%	13.8%
Total	**42,626**	**100.0%**	**100.0%**	**113**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of February 2023; UK Average from Experian Goad report of February 2023

5.145 Wythenshawe has a good overall comparison offer, with a number of larger national multiple operators present. Its comparison provision exceeds the UK averages in terms of both floorspace and units. The offer includes both national multiples such as B&M, Sports Direct, Boots and Superdrug and a range of independent operators. The non-food offer is principally focused on the discount end. Sports Direct, JD Sports and Wynsors Shoes are the principal clothing and footwear operators within the centre.

5.146 The proportion of floorspace occupied by convenience operators within Wythenshawe district centre falls just below the national average, but above the national average in terms of the number of units. Key convenience operators within the district centre include Asda, Iceland, Farmfoods and Heron Foods, amongst a range of smaller operators such as Pound Bakery, Wilshers Market Butchers and a small independent fruit and veg kiosk.

5.147 Wythenshawe's leisure offer, in terms of both units and floorspace, falls below the national average. The leisure offer is predominantly focused around cafes, takeaways and other fast food operators and the largest leisure unit is the Wythenshawe Leisure Centre, which forms part of the Forum complex. Key leisure operators include McDonald's, KFC, Costa and Subway. There are no restaurants or bars within the centre, which limits the leisure offer, particularly those opening into the evening.

5.148 The proportion of units and floorspace occupied by financial and business operators falls below the national average in both cases. Wythenshawe's financial and business offer includes two banks, a pawnbrokers and a Cash Generator, amongst other financial services. Looking at Wythenshawe's retail service sector, the offer includes opticians, hairdressers, nail bars, and a tanning shop. In addition, the Asda also includes a Post Office kiosk.

5.149 Wythenshawe's vacancy rate is the highest of all of the district centres within the authority area, both in terms of the proportion of floorspace and units. At 18.5% and 27.7% respectively, the proportion of vacant floorspace and units exceeds the national average (of 13.8% and 13.8% respectively). The significantly higher proportion of vacant units indicates that a number of these units are small.

5.150 The largest unoccupied unit within Wythenshawe (the former Buzz Bingo) accounts for approximately 32% of the total vacant floorspace in the district centre. Other key vacancies include the former Wythenshawe Market and adjacent units. The closure of the market has resulted in a quieter northern part of the centre, reducing footfall and general activity. Although the vacant units are not necessarily concentrated to one specific area of the centre, their presence and associated detraction to the aesthetics of the centre due to their closed shutters and inactive shop frontages detract from the overarching vitality and viability of the centre.

5.151 At present, the district centre provides for day-to-day needs of the local catchment through the provision of key retail, leisure and service operators. However, we consider that interventions are required to improve the perception of the centre in relation to a number of areas, including: the high vacancy rate, lack of footfall throughout, dominance by cars, and lack of diversity in the offer.

5.152 To this end, the Council published the Wythenshawe Town Centre Development Framework in 2022. The Development Framework identifies the current weaknesses of the centre but also provides for achievable opportunities which will considerably enhance its vitality and viability.

5.153 Such improvements include diversification of uses, particularly in the leisure sector, improving permeability and accessibility, and also encouraging additional residential and commercial uses into the centre on the key development sites. Realising the interventions set out within the Framework will help to secure the future of the district centre and ensure that it fully meets the needs of its local community. As a consequence, we conclude that Wythenshawe is currently undergoing a transformation which offers substantial opportunity for the revitalisation of the centre's overall health.

Overview of Vitality and Viability of District Centres

5.154 Table 5.19 overleaf provides a broad overview of the performance of Manchester's district centres in relation to the some of the healthcheck indicators set out in the Town Centres and Retail PPG. The key to the table is as follows:

	Healthy – The centre is performing well with respect to this healthcheck indicator
	Reasonably Healthy – The centre is performing reasonably well with respect to this healthcheck indicator
	Opportunities for Improvement – The centre's performance with respect to this healthcheck indicator could be improved
	Substantial Opportunities for Improvement – The centre's performance with respect to this healthcheck indicator could be substantially improved

Table 5.19: Overview of District Centre Performance in Manchester

Health Check Indicator	Baguley	Cheetham Hill	Chorlton	Didsbury	Eastlands	Fallowfield	Gorton	Harpurhey	Hulme	Levenshulme	Longsight	Newton Heath	Northenden	Openshaw	Rusholme	Withington	Wythenshawe
Diversity of uses																	
Proportion of vacant street level property																	
Commercial yields on non-domestic property																	
Commercial rents																	
Pedestrian flows																	
Accessibility																	
Perception of safety and occurrence of crime																	
State of town centre environmental quality																	
Balance between independent and multiple stores																	
Opening hours/availability/extent to which there is an evening and night time economy																	
Overall Health of District Centre																	

5.155 Some broad conclusions that can be drawn from the findings set out above and in Table 5.19 include the following:

- Most of Manchester's district centres are performing reasonably well or well in relation to the selected healthcheck indicators. The centre of most concern is Wythenshawe, followed by Fallowfield, Gorton, and Harpurhey.
- With the exceptions of Harpurhey, and Wythenshawe, vacancy rates across the district centres are generally low.
- A number of Manchester's centres perform relatively poorly in terms of environmental quality, with Fallowfield and Gorton identified as having the potential to deliver an improved public realm. However, it is recognised that the character of some centres is impacted by their location on an arterial route and a focus on day-to-day retail which is often characterised by low margins.
- A number of district centres benefit from healthy evening/night-time economies, particularly the South Manchester centres of Chorlton, Didsbury, Fallowfield, Rusholme and Withington.

5.156 For a further broad overview, Tables 5.20 and 5.21 overleaf show the diversity of uses across all district centres, in terms of floorspace and proportion of units, compared to the averages for Manchester's district centres, and centres across the UK as a whole. These tables use colour scales to indicate whether a use is over-represented compared to the Manchester district centre average (green) or under-represented compared to the Manchester district centre average (red). The colour scales are reversed in relation to vacancies, where higher percentages are coloured red and lower proportions are coloured green.

5.157 Tables 20 and 21 show that:

- The mean vacancy rates for Manchester's district centres are below the UK average, with only Wythenshawe and Harpurhey having vacancy rates that exceed the national average. Four centres (Baguley, Fallowfield, Eastlands and Openshaw) have floorspace vacancy rates of 2.0% or less, meaning that they perform exceptionally well even for Manchester.
- Manchester's district centres as a whole have a lower proportion of comparison floorspace and units than a typical centre in the UK, but Baguley has significantly more than average and Fallowfield has significantly less.
- The district centres tend to be convenience-led, with this use having much more representation in Manchester than in the rest of the UK. Notable exceptions are Chorlton and Didsbury, where leisure uses make up a greater than average share of the centres' floorspace and units.
- Manchester's district centres collectively have a lower proportion of leisure floorspace than average, but a larger proportion of leisure units. This finding suggests that most of these premises are small in scale and the centres contain few large-floorplate leisure uses such as cinemas, bingo halls and swimming baths. Rusholme has the highest percentages of leisure space and units.
- Centres with a good balance and diversity of uses include Newton Heath and Didsbury.

Table 5.20: District centre floorspace composition (%) compared to Manchester and UK Averages

Health Check Indicator	Baguley	Cheetham Hill	Chorlton	Didsbury	Eastlands	Fallowfield	Gorton	Harpurhey	Hulme	Levenshulme	Longsight	Newton Heath	Northenden	Openshaw	Rusholme	Withington	Wythenshawe	District Centre	Manchester	UK Average
Comparison	36.2	15.1	15.6	15.3	18.8	2.3	13.9	22.3	11.6	15.8	24.8	14.9	16.4	32.3	16.0	18.1	35.6	19.1	22.0	30.1
Convenience	61.3	49.7	19.4	19.5	61.7	23.8	51.2	42.7	42.4	15.9	46.3	44.7	17.3	37.2	18.3	17.9	14.6	34.3	6.0	15.5
Financial	0.0	5.2	4.4	11.0	0.0	40.6	2.3	0.8	2.1	16.7	5.4	5.6	11.0	2.6	3.5	10.2	2.9	7.3	3.1	6.6
Leisure	0.0	18.0	34.2	36.7	15.8	29.6	8.8	11.5	27.3	28.4	13.4	16.7	30.9	11.1	47.9	32.4	19.3	22.5	52.6	26.3
Retail Services	2.5	6.1	14.7	11.3	2.1	2.4	18.0	9.6	8.9	15.4	5.5	11.2	18.7	14.9	9.0	13.0	9.3	10.1	1.0	7.2
Vacant	0.0	5.9	11.8	6.3	1.6	1.4	5.8	13.2	7.7	7.7	4.7	6.9	5.8	2.0	5.3	8.3	18.5	6.6	15.2	13.8

Table 5.21: District centre unit composition (%) compared to Manchester and UK Averages

Health Check Indicator	Baguley	Cheetham Hill	Chorlton	Didsbury	Eastlands	Fallowfield	Gorton	Harpurhey	Hulme	Levenshulme	Longsight	Newton Heath	Northenden	Openshaw	Rusholme	Withington	Wythenshawe	District Centre	Manchester	UK Average
Comparison	50.0	17.6	15.8	19.5	11.8	2.8	15.7	26.0	7.9	14.9	33.6	18.6	14.3	21.7	18.2	18.4	29.5	19.8	25.3	26.9
Convenience	37.5	13.0	11.1	10.5	17.6	8.3	21.3	14.0	21.1	13.2	13.1	16.9	12.2	15.9	9.6	11.2	11.6	15.2	7.1	9.3
Financial	0.0	12.0	6.3	11.3	0.0	16.7	6.7	2.0	7.9	18.2	10.3	6.8	9.2	7.2	6.1	11.2	6.3	8.1	3.9	8.7
Leisure	0.0	28.7	37.9	36.1	52.9	59.7	18.0	28.0	26.3	26.0	22.4	27.1	33.7	21.7	49.5	32.7	13.4	30.2	44.9	25.4
Retail Services	12.5	17.6	16.6	18.0	11.8	8.3	27.0	12.0	28.9	17.4	12.1	16.9	22.4	26.1	10.6	17.3	11.6	16.9	2.1	15.8
Vacant	0.0	11.1	12.3	4.5	5.9	4.2	11.2	18.0	7.9	10.3	8.4	13.6	8.2	7.2	6.1	9.2	27.7	9.7	16.7	13.8

6. Population and Expenditure

Study Area and Household Survey

6.1 The quantitative retail and leisure need assessment set out in this report is based upon a Study Area which is broadly reflective of Manchester's principal catchment area. The Study Area adopted by the previous Quantitative Retail Needs Update Report 2010 has been retained which consisted of 16 separate zones. However, in order to capture the shopping habits of Manchester city centre's principal catchment area, the Study Area also now includes parts of Bury, Oldham, Rochdale, Stockport, Tameside, Trafford, and Salford, where residents may look to facilities in the City of Manchester to meet their retail and leisure needs. The new Study Area therefore comprises 22 zones, including the 16 adopted as part of the 2010 Study and eight additional zones covering the peripheral areas.

6.2 The 22 zones are assembled on the basis of postcode sectors and are considered representative of geographic areas that may accommodate broadly similar patterns of shopping behaviour. The below Table 6.1 identifies the postcode sectors which define each of the zones. A plan defining the geographic extent of the Study Area and the below zones is provided at Appendix 1.

Table 6.1: Study Area Zones by Postcode Sector

Survey Zone	Area	Postcode Sectors	Survey Zone	Area	Postcode Sectors
1	Manchester City Centre	M1 1, M1 2, M1 3, M1 4, M1 5, M1 6, M1 7, M2 1, M2 2, M2 3, M2 4, M2 5, M2 6, M2 7, M3 1, M3 2, M3 3, M3 4, M3 5, M3 6, M3 7, M4 1, M4 2, M4 3, M4 4, M4 5, M4 6, M4 7	12	Burnage	M19 1, M20 1, M20 3, M20 4
2	Cheetham Hill	M8 0, M8 4, M8 5, M8 8, M8 9	13	Didsbury	M20 2, M20 5, M20 6
3	Harpurhey	M9 0, M9 4, M9 5, M9 6, M9 7, M9 8	14	Northenden	M22 4, M22 8
4	Newton Heath	M40 0, M40 1, M40 2, M40 3, M40 5, M40 7, M40 8, M40 9	15	Baguley	M23 0, M23 1, M23 2, M23 9
5	Clayton	M11 1, M11 2, M11 3, M11 4	16	Wythenshawe	M22 0, M22 1, M22 5, M22 9, M90 1, M90 2, M90 3, M90 4, M90 5
6	Longsight	M12 4, M12 5, M12 6, M13 0, M13 9	17	Trafford	M16 0, M16 9, M32 8, M33 2, M33 3, WA15 6, WA15 7, WA15 8
7	Gorton	M18 7, M18 8	18	Salford	M5 3, M5 4, M7 1, M7 2, M7 4
8	Levenshulme	M19 2, M19 3	19	Prestwich	M24 1, M24 4, M25 0, M25 2
9	Fallowfield	M14 4, M14 5, M14 6, M14 7	20	Failsworth and Chadderton	M35 0, M35 9, OL 9 7, OL 9 8, OL9 9
10	Hulme	M15 4, M15 5, M15 6, M16 7	21	Droylsden	M34 2, M34 5, M43 6, M43 7
11	Chorlton	M16 8, M21 0, M21 7, M21 8, M21 9	22	Stockport	SK4 3, SK4 4, SK4 5, SK5 6, SK8 2, SK8 3, SK8 4

6.3 In December 2022, a survey of 2,430 households was undertaken by NEMS within the defined Study Area to ascertain where residents go to undertake a range of shopping and leisure activities. Across each of the 22 zones, a minimum of 100 surveys have been undertaken, with the remaining additional 230 surveys apportioned on a pro-rata basis according to the population of each zone (i.e. more surveys were undertaken in the most populous zones). The zones were used as the basis for the NEMS household survey, which informed the assessment of shopping patterns as set out at Section 7 of this report. The survey results also underpin the quantitative retail capacity assessment which follows at Section 8 and the quantitative leisure capacity assessment at Section 9.

6.4 To identify the expenditure claimed by retail destinations (and the capacity which is potentially available to support additional retail and leisure development), the first step is to estimate the population and future convenience and comparison goods expenditure associated with the Study Area.

Study Area Population

6.5 The population within each postcode sector and each zone at 2023 has been calculated using Experian Micromarketer G3 data (2021 estimate, which was issued in February 2023). We have confirmed with Council officers that Experian's population projections are broadly consistent with the level of growth which is being planned for across the authority area in practice. The Council is producing a separate explanatory note to cover this matter. Table 5.2 below sets out Experian's population projections for each zone in the Study Area for reporting years 2023, 2028, 2033, 2038, and 2040.

Table 6.2: Estimated Study Area Population by Survey Zone

Zone	2023	2028	2033	2038	2040
1	64,463	67,736	70,494	72,723	73,312
2	31,769	32,232	32,845	33,457	33,707
3	41,001	41,461	42,262	43,062	43,286
4	44,366	44,765	45,595	46,323	46,564
5	23,355	23,663	24,029	24,503	24,675
6	42,623	43,562	44,564	45,429	45,790
7	25,031	25,363	25,840	26,366	26,555
8	23,551	23,870	24,213	24,611	24,774
9	57,032	58.980	60,833	61,990	62,298
10	39,655	40,838	41,880	42,745	43,042
11	40,595	40,787	40,977	41,118	41,218
12	37,955	38,811	39,661	40,433	40,756
13	24,973	25,045	25,111	25,185	25,179
14	16,012	16,087	16,294	16,514	16,567
15	31,639	31,832	32,314	32,675	32,811
16	27,859	28,209	28,766	29,183	29,386
17	85,554	87,055	88,363	89,745	90,401
18	43,030	45,115	47,135	49,016	49,714
19	33,710	34,413	35,035	35,729	35,998
20	50,247	51,290	52,228	53,212	53,606
21	48,001	48,742	49,380	50,128	50,432
22	68,046	69,058	70,021	71,223	71,814
Total	**900,467**	**918,914**	**937,840**	**955,370**	**961,885**

Source: Table 1 of Appendix 6

6.6 Based on Experian's population projections, we estimate that the Study Area population will increase from 900,467 persons at 2023 to 961,885 persons at 2040. This equates to an increase of 61,418 persons (or 6.8%) over the 17-year period.

Retail Expenditure

6.7 In order to calculate per capita convenience and comparison goods expenditure, we have utilised Experian Micromarketer G3 data, which provides detailed information on local consumer expenditure that takes into consideration the socio-economic characteristics of the local population. The base year for the Experian expenditure data is 2021. Our methodology takes account of the fact that some special forms of trading expenditure[16] is not available to support retail floorspace, and then allows for increases in per capita expenditure growth on an annual basis.

6.8 Figure 5 of Appendix 3 of ERPBN21 provides estimates in respect of the proportion of convenience and comparison goods expenditure that will be committed through special forms of trading both now and in the future. We have 'stripped out' any survey responses which relate to expenditure committed via special forms of trading and have instead made an allowance derived from Experian's recommendations (which we consider to be the most appropriate means by which to account for such expenditure).

6.9 We set out Experian's expenditure growth estimates within the below Table 6.3.

6.10 In considering special forms of trading, many products which are ordered online are actually sourced from a store's shelves or stockroom in practice (this is particularly the case with convenience goods). As such, expenditure committed in this manner acts to sustain shops and can be considered 'available' to support floorspace within the Study Area. Accordingly, in order not to overstate the influence of special forms of trading on retailers, our methodology utilises Experian's 'adjusted' allowance for special forms of trading (which is provided at Figure 5 of ERPBN21). This allowance indicates that 5.8% of convenience goods expenditure and 28.5% of comparison goods expenditure is 'lost' to shops at base year 2021 through special forms of trading purchases.

6.11 Having made an allowance for special forms of trading, we then take account of projected changes in expenditure in accordance with the recommendations provided by Figure 6 of Appendix 3 of ERPBN21. Experian provides overall growth rates and 'adjusted' rates, which account for any additional increases in expenditure lost to special forms of trading. The latest growth rates suggest that growth in comparison goods expenditure should pick up in the next few years as confidence in the economy returns, with this following a number of turbulent years following the start of the Covid-19 pandemic in 2020. The applicable annual per capita growth rates are set out below at Table 6.3.

6.12 For convenience goods, Experian forecasts very limited per capita expenditure growth across the entire period to 2040. The position is even more pessimistic when account is taken of future growth in special forms of trading, with Experian's forecasts suggesting that the growth in convenience goods expenditure available to actual stores will not rise above 0.0% per annum across the entire period 2022 to 2040. Overall, it is evident that forecast per capita convenience goods expenditure does not increase in the period to 2040. The position in respect of comparison goods expenditure is more positive. Experian forecasts that per capita comparison goods expenditure growth will take place over the period to 2040, but (with the exception of forecast per capita growth of 6.8% in 2022) will not exceed 2.5% per annum in the period from 2022 to 2040. Experian's forecasts suggest that there will

[16] Identified as comprising sales via the internet, mail order, stalls and markets, door-to-door and telephone sales (i.e., all non-store sales).

be relatively healthy growth in comparison goods even after accounting for expenditure lost to special forms of trading.

Table 6.3: Experian Retail Planner Briefing Note 21 Convenience and Comparison Goods Annual Per Capita Growth Rates

Year	Convenience Goods	Convenience Goods 'Adjusted SFT'	Comparison Goods	Comparison Goods 'Adjusted SFT'
2022	-2.5	-5.0	6.8	3.3
2023	-2.4	-2.9	-1.9	-2.3
2024	-2.3	-1.0	-4.1	-3.1
2025	-1.7	-0.6	0.4	1.2
2026	-1.0	-0.4	2.5	2.9
2027	-0.8	-0.2	2.1	2.5
2028	-0.7	-0.1	1.9	2.2
2029	-0.6	-0.1	2.0	2.3
2030	-0.6	-0.1	2.0	2.3
2031	-0.5	-0.1	2.1	2.4
2032	-0.5	-0.1	2.2	2.4
2033	-0.4	0.0	2.4	2.6
2034	-0.4	0.0	2.4	2.6
2035	-0.4	0.0	2.4	2.5
2036	-0.3	0.0	2.3	2.5
2037	-0.2	0.0	2.5	2.6
2038	-0.2	0.0	2.5	2.6
2039	-0.2	0.0	2.5	2.6
2040	-0.2	0.0	2.4	2.6

Source: Figure 7 of Appendix 3, Experian Retail Planner Briefing Note 21 (February 2024)

6.13 This Study utilises the most up to date Experian expenditure data and growth forecasts. However, longer term growth forecasts (beyond the next ten years) should be treated with caution given the inherent uncertainties associated with predicting the performance of the economy over time (particularly in the current economic, health and political climates). As such, assessments of this nature should be reviewed on a regular basis to ensure that forecasts over the medium and longer term reflect changing circumstances.

6.14 In this regard, we note that paragraph 90 of the NPPF requires local planning authorities to allocate sites to meet likely town centre needs **'…looking at least ten years ahead'**, which differs from the previous requirement to meet needs across the entire plan period. This change is reflective of turbulent economic conditions and the speed of change within the retail sector in recent years.

6.15 By applying Experian's recommendations in respect of special forms of trading and expenditure growth, we can produce expenditure estimates for each survey zone and the overall Study Area at 2023, 2028, 2033, 2038, and 2040.

Convenience Goods Expenditure

6.16 Taking into account the Study Area resident population and the available per capita convenience goods expenditure, we estimate that £1,963.5m[17] of convenience goods expenditure originates within the Study Area at 2023. The below Table 6.4 indicates that available Study Area convenience goods expenditure is forecast to increase to £2,039.9m at 2040.

Table 6.4: Total Available Study Area Convenience Goods Expenditure

2023 (£m)	2028 (£m)	2033 (£m)	2038 (£m)	2040 (£m)
1,963.5	1,957.6	1,989.3	2,026.1	2,039.9

Note: In 2021 prices

6.17 Table 6.5 indicates that this represents an increase of £76.4m (or 3.9%) across the Study Area between 2023 and 2040. Given the static growth in per capita expenditure, this increase can be attributed to growth in the Study Area's population.

Table 6.5: Growth in Available Study Area Convenience Goods Expenditure

Growth 2023-28 (£m)	Growth 2023-33 (£m)	Growth 2023-38 (£m)	Growth 2023-40 (£m)
-5.9	25.8	62.6	76.4

Note: In 2021 prices

6.18 We have assumed that around 75% of available convenience goods expenditure would take the form of main food shopping and that around 25% would take the form of top-up shopping (which relates to smaller purchases often made using a basket rather than a shopping trolley).[18]

6.19 By applying this ratio, we estimate that main food shopping trips account for £1,472.6m of Study Area convenience goods expenditure at 2023, and top-up shopping trips account for £490.9m.

Comparison Goods Expenditure

6.20 For comparison goods, Table 6.6 sets out our estimate that the resident population of the Study Area will generate £2,184.3m of comparison goods expenditure at 2023. Available comparison goods expenditure is then forecast to increase to £3,314.9 at 2040.

Table 6.6: Total Available Study Area Comparison Goods Expenditure

2023 (£m)	2028 (£m)	2033 (£m)	2038 (£m)	2040 (£m)
2,184.3	2,356.1	2,706.3	3,127.8	3,314.9

Note: In 2021 prices

6.21 The identified increase in comparison goods expenditure growth is substantial, but still represents a level of annual growth that is more circumspect than that which has been achieved in the past. This is due to both a reduction in the overall level of growth when compared to that achieved in the early part of this millennium, and as a result of further forecast increases in expenditure committed via special forms of trading (most obviously, internet shopping).

[17] In 2021 prices, as is every subsequent monetary reference.
[18] This is a standard split applied in undertaking this exercise.

6.22 As the below Table 6.7 identifies, our assessment estimates that there will be an increase of £1,130.6m (equating to 51.8%) in respect of Study Area comparison goods expenditure between 2023 and 2040.

Table 6.7: Growth in Available Study Area Comparison Goods Expenditure

Growth 2023-28 (£m)	Growth 2023-33 (£m)	Growth 2023-38 (£m)	Growth 2023-40 (£m)
171.8	522.0	943.5	1,130.6

Note: In 2021 prices

6.23 We sub-divide comparison goods expenditure into eight categories, these being: 'DIY', 'Electrical' and 'Furniture' (collectively referred to as bulky goods); and, 'Clothing and Footwear', 'Books, CDs and DVDs', 'Health, Beauty and Chemist Goods', 'Small Household Goods', and 'Toys, Games, Bicycles and Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis. Experian's estimates are reflected in the detailed expenditure tables set out at Table 7b of Appendix 6 of this report.

6.24 In considering expenditure growth, it should be noted that not all growth arising within the Study Area is available to support additional floorspace in the City of Manchester area. Instead, account needs to be taken of:

- the market share of expenditure secured by retailers within the City of Manchester area (and the fact that many needs are successfully met outside the Borough);
- the claim made by existing retailers on expenditure growth (the future efficiency of retail floorspace); and
- the expenditure that will be claimed by committed retail developments.

6.25 These issues are addressed in the assessment of retail capacity provided in Section 8 of this report.

7. Market Research – Household Surveys

Market Share Analysis: Household Survey Results

7.1 The NEMS household survey identifies where residents travel to undertake a range of shopping and leisure activities. The summary of results provided in this section focuses on the market share of shopping trips secured by retail venues for various types of shopping. In December 2022, a survey of just over 2,000 households was undertaken by NEMS within the defined Study Area to ascertain where residents go to undertake a range of shopping and leisure activities.

7.2 In reviewing the Study Area, it is important to recognise that the vast majority of convenience goods expenditure generated within a given area is generally claimed by local foodstores. This is because shoppers look to source convenience goods close to home. Comparison goods shopping is more likely to result in longer trips to source goods at higher order destinations.

7.3 The household survey is reproduced as part of Appendix 2 of this Study. In retail terms, the principal purpose of the survey is to establish:

- patterns of convenience goods spending, based on the location of:
  - the shop or shops respondents last visited and visited 'the time before last' to undertake their main food shop; and
  - the shop or shops respondents last visited and visited 'the time before last' to undertake their main top-up food shop.
- patterns of comparison goods spending, based on the location of the respondent's last shopping trip to purchase the following types of comparison goods:
  - clothing and footwear;
  - books, CDs, DVDs and stationery;
  - small household goods, such as home furnishings, clocks, jewellery, glass and china;
  - toys, games, bicycles and recreational goods;
  - chemist goods, including health and beauty items;
  - electrical goods, such as televisions, washing machines and computers;
  - DIY and gardening goods; and
  - furniture, carpets and floor coverings.

7.4 The analysis which follows considers market share for the above sub-sectors. Our assessment is based on the market share of expenditure to particular 'bricks and mortar' retail destinations. For comparison goods, the zonal market share secured by each retail destination for each of the above eight sub-sectors is taken directly from the corresponding household survey question responses.

7.5 For convenience goods, the methodology differs. We have found that retail assessments of this nature can often overstate the turnover of discount foodstores and understate the turnover of larger format stores operated by the 'big four'. This is because apportioning 'main food' convenience goods expenditure in accordance with a household survey fails to account for the fact that goods are generally cheaper at discount foodstores. Such foodstores are also typically of a lesser scale and may not sell all products (for example, they may have a lesser range in respect of ingredients and in respect of ready meals). The consequence of this is that trips to a discount foodstore may often result in a lesser level of expenditure than trips to a large food superstore.

Retail Goods Market Share Analysis

Convenience Goods Market Share

7.6 Our analysis begins by reviewing the retention of convenience goods expenditure within each of the Study Area zones (i.e. the proportion of expenditure originating within a given zone which is claimed by retailers located within that same zone). This enables an understanding of whether residents are having to travel to meet their convenience goods shopping needs, or if they are typically able to meet their needs in proximity to where they live. It is accepted that some respondents will live towards the boundary of their respective zones and some trips will therefore be able to be undertaken to nearby zones in a sustainable manner.

Table 7.1: Zonal Convenience Goods Retention Rates Across the Study Area at 2023

Zone	Area	Main Food Shopping Zonal Retention Rate 2023 (%)	Top-Up Food Shopping Zonal Retention Rate 2023 (%)	Combined Convenience Goods Shopping Zonal Retention Rate (%)
1	Manchester City Centre	28.3%	35.2%	30.0%
2	Cheetham Hill	54.0%	64.4%	56.6%
3	Harpurhey	58.2%	67.8%	60.6%
4	Newton Heath	13.6%	31.5%	18.0%
5	Clayton	83.1%	72.0%	80.3%
6	Longsight	57.0%	60.2%	57.8%
7	Gorton	59.8%	67.7%	61.8%
8	Levenshulme	32.3%	35.8%	33.2%
9	Fallowfield	49.6%	53.3%	50.5%
10	Hulme	31.5%	40.6%	33.7%
11	Chorlton	33.4%	75.7%	44.0%
12	Burnage	48.0%	48.8%	48.2%
13	Didsbury	61.3%	83.4%	66.8%
14	Northenden	9.8%	44.9%	18.6%
15	Baguley	50.2%	60.0%	52.7%
16	Wythenshawe	61.5%	62.8%	61.8%
17	Trafford	8.2%	37.7%	15.6%
18	Salford	29.7%	50.7%	35.0%
19	Prestwich	18.6%	35.7%	22.9%
20	Failsworth and Chadderton	57.6%	57.4%	57.5%
21	Droylsden	17.8%	38.4%	23.0%
22	Stockport	13.6%	37.8%	19.6%

Source: Tables 3 and 4 of Appendix 6 of this Study

7.7 Table 7.1 demonstrates that the highest main food retention rates are within Zones 5 (83.1%), 13 (61.3%) and 16 (61.5%). Within Zone 5, residents are choosing Aldi in Clayton (26.3%), Asda at Sports City (28.3%) and the Morrisons in Openshaw (19.8%) to meet their main food shopping needs, demonstrating a good overall provision of larger format convenience offer within the zone. The 2010 Manchester Quantitative Needs Update Report identified that 42.9% of Zone 5 residents' main food expenditure was being spent at the Asda at Sports City followed by 13.2% at the Tesco in Droylsden and 8.3% at the Aldi in Clayton. There has been a general 'levelling' of main food shopping patterns within the Zone, with a decreased dominance of the Asda at Sports City.

7.8 In terms of Zone 13, the principal foodstore attracting main food shopping trips is the Tesco Superstore in East Didsbury (33.7%), followed by the Aldi in Didsbury (17.4%). In 2010, the Tesco store in East Didsbury was also the principal store attracting 33.5% of the available expenditure, followed by the Tesco in Burnage at 17.5% (compared to 12.5% in the 2023 Study).

7.9 In Zone 16, the residents' main food shopping offer is dominated by the Asda store in Wythenshawe district centre, attracting 52.5% of the available main food expenditure, and to a lesser extent the Aldi in Sharston, attracting 5.7% of the available expenditure. The equivalent figure from the 2010 Study from residents in Zone 16 to the Asda in Wythenshawe was 41.6%. The high proportion of main food shopping trips travelling to the Asda in Wythenshawe could indicate a lack of choice of provision within Wythenshawe district centre, albeit it is noted that there is market interest in bringing forward a new foodstore at the former Buzz Bingo site off Rowlandsway on the edge of the district centre.

7.10 Of those zones within the Manchester authority area, the lowest main food retention rates can be seen in Zones 1 (28.3%), 4 (13.6%) and 14 (9.8%). Within Zone 1, which covers the City Centre, the principal destination for Zone 1 residents is the Aldi store in the Arndale Centre attracting 9.7% of the available main food expenditure, followed by the Aldi on Great Ancoats Street (6.3%) and then the Tesco on Market Street (5.4%). However, residents residing in Zone 1 are also choosing to meet their main food shopping requirements at the Asda in Eastlands (3.8%), the Tesco in Gorton (2.3%) and the Asda in Hulme (3.4%). It is clear however, that no single operator is drawing a considerably high proportion of trips from Zone 1 residents, and that instead, the trips are spread relatively equally across a number of large format convenience stores. In 2010, a total of 29.1% of Zone 1 residents' main food expenditure was being spent at city centre convenience stores, with a further 23.4% at the Sainsbury's on Regent Road and 19.1% at the Asda in Sportscity.

7.11 In terms of Zone 4 residents, although the Asda, Iceland and Lidl attract over 4% of trips respectively, the Asda in Harpurhey and the Asda at Sportscity both attract a higher proportion of trips at 19.2% and 10.8% respectively. Similar patterns were observed in 2010, at which point 20.4% of the main food expenditure was being spent at the Asda in Harpurhey and 12.2% at the Asda in Sportscity, with further relatively high proportions of expenditure being spent at the Morrisons in Failsworth and Chadderton.

7.12 In terms of top-up food shopping, higher retention rates are seen across each of the 22 zones except for Zones 5 and 20. The biggest shift in retention rates when comparing the main food and top-up food shopping patterns can be seen in Zone 11, where a total of 75.7% of top-up food expenditure is being spent at convenience destinations located in the zone (compared to 33.4% of main food expenditure), indicating the wider provision of convenience provision meeting day-to-day top up needs compared to main food shopping needs. For example, Zone 11 includes four Co-op stores, three Tesco Express stores and a range of smaller independent operators such as the Unicorn Grocery, which together help to retain the top-up shopping expenditure but just one principal main food convenience store being the Morrisons in Chorlton district centre.

7.13 We find overall that the broad zonal retention rates identified appear to appropriately reflect the geography of current provision. There may well be scope to improve local retention rates subject to provision coming forward in appropriate locations in the future and that there are some areas where single foodstores are dominating the market in certain circumstances.

Comparison Goods Market Share

7.14 The below Table 7.2 sets out the comparison goods shopping patterns, relating to the proportion of zonal comparison goods expenditure which is claimed by operators located within Manchester.

7.15 The Table indicates that Manchester's operators claim more than four out of every ten pounds originating within Zones 1 to 16, except Zone 14. The highest proportion of comparison goods expenditure attracted to Manchester's operators is within Zones 2 and 3 at 86.3% and 76.2% respectively. Within both zones, both the city centre operators and operators at Manchester Fort Shopping Park draw high proportions of expenditure from residents, with Manchester Fort Shopping Park being the principal comparison shopping destination for residents in both zones. For Zone 1 residents, the principal destination is Manchester City Centre, followed by Manchester Fort Shopping Park.

7.16 Within Zone 9, within which 69.1% of available comparison goods expenditure is spent at Manchester destinations, just over a fifth of this is spent in the City Centre, and a further 6% in Longsight district centre. The remaining expenditure is spread across a number of in and out of centre destinations across the authority area, including some larger convenience stores which include a good level of comparison sales.

7.17 Looking at Zones 1 to 16 in particular, the lowest Manchester comparison goods market share can be seen in Zone 13, at 36.9%. Of this expenditure spent at destinations in Manchester, approximately 13% is spent at operators in the City Centre and a similar level in Didsbury district centre.

7.18 Table 7.2 also provides the comparable figures for each of the Zones 1 to 16 from the 2010 Study. In every Zone except 1 and 10, the proportion of comparison goods expenditure directed to operators within the authority area has increased between 2010 and 2023, demonstrating that a higher proportion expenditure is being retained at Manchester shopping destinations. The biggest decrease can be seen in Zone 1, which has decreased from 71.7% in 2010 to 51.4% in 2023. Analysing the quantitative assessment further, it is clear that one of the biggest changes for Zone 1 residents is the increase in the level of comparison expenditure, which is now being spent at the Trafford Centre, which has increased from 4.7% in 2010 to 11.8% in 2023. This shift could be due to the introduction of the Metrolink line directly from the City Centre to the Trafford Centre.

Table 7.2: Manchester Comparison Goods Market Share by Zone at 2023 and 2010

Zone	Comparison Goods Manchester Authority Area Market Share 2023 (%)	Comparison Goods Manchester Authority Area Market Share 2010 (%)
1	51.1%	71.7%
2	86.3%	72.4%
3	76.2%	66.8%
4	62.7%	57.4%
5	60.1%	41.6%
6	66.8%	51.9%
7	43.7%	34.6%
8	41.8%	34.7%
9	69.1%	54.7%
10	53.2%	54.3%
11	44.7%	43.7%
12	50.1%	40.9%
13	49.3%	36.3%
14	36.9%	25.0%
15	49.3%	21.0%
16	54.9%	33.5%
17	12.6%	-
18	52.2%	-
19	36.9%	-
20	18.5%	-
21	17.7%	-
22	22.9%	-
Total Study Area	**43.4%**	**-**

Source: Table 25 of Appendix 6 of this Study for 2023 total comparison market share. The market share is then calculated as a proportion of the total available comparison expenditure; Table 19 of the Manchester Retail Capacity Study Update 2010 for market shares; Zones 17 to 22 have been excluded as these were additional zones added for the 2023 Study.

7.19 Table 7.3 below then provides the proportions of comparison expenditure being directed to Manchester City Centre operators on a zonal basis at 2023, and then compares these figures to the 2010 results.

7.20 The Table demonstrates that in each of the Zones 1 to 16, the level of comparison expenditure being spent at City Centre operators has decreased, with some zones witnessing a far more substantial decline over the 13 years. However, as is demonstrated in Table 4.2 above, the reduction in comparison expenditure being spent at City Centre stores is not also reflected in the authority wide figures, which have witnessed an increase in most cases. This demonstrates that other defined centres and out of centre retail facilities in the authority area have instead witnessed an increase in comparison expenditure retention.

Table 7.3: Manchester City Centre Comparison Goods Market Share by Zone at 2023 and 2010

Zone	Comparison Goods Manchester City Centre Market Share 2023 (%)	Comparison Goods Manchester City Centre Market Share 2010 (%)
1	26.2%	58.5%
2	19.7%	39.2%
3	13.1%	35.5%
4	16.6%	40.4%
5	14.5%	27.0%
6	20.7%	32.7%
7	8.1%	27.2%
8	14.4%	24.0%
9	26.5%	40.8%
10	25.6%	41.8%
11	11.7%	31.0%
12	15.7%	30.1%
13	13.5%	22.5%
14	8.1%	11.9%
15	6.0%	13.6%
16	4.7%	14.7%
17	4.9%	-
18	13.3%	-
19	11.9%	-
20	13.9%	-
21	9.3%	-
22	8.9%	-
Total Study Area	**14.0%**	-

Source: Table 25 of Appendix 6 of this Study for 2023 total comparison market share; Table 19 of the Manchester Retail Capacity Study Update 2010 for market shares; Zones 17 to 22 have been excluded as these were additional zones added for the 2023 Study.

Market Share Summary and Expenditure Claimed by Manchester Retailers

7.21 We confirm the convenience goods, comparison goods, and overall market share of Study Area expenditure claimed by retailers located in Manchester in the below Table 7.4.

7.22 Manchester's convenience goods market share of 55.3% is greater than its comparison goods market share of 43.4%. This reflects the fact that groceries are generally purchased close to home and that (as the name suggests) shoppers are prepared to travel to secure greater choice when purchasing comparison goods. However, it also indicates that there are a number of larger format convenience goods operators which are serving Manchester residents' convenience shopping requirements but which are located outside of the authority area. Such operators include those in Salford and Trafford, and which although not in the authority area, are typically located in sustainable locations for Manchester residents to access easily.

Table 7.4: Convenience and Comparison Goods Expenditure Retention and Leakage

Type of Expenditure	2023 Residents' Expenditure (£m)	2023 Market Share (%)
Study Area Convenience Goods Expenditure	£1,086.3m	55.3%
Study Area Comparison Goods Expenditure	£947.1m	43.4%
Total Study Area Expenditure	£2,033.4m	48.8%

Source: Table 25 of Appendix 6
Note: 2021 prices

7.23 In conclusion, the household survey demonstrates that Manchester's convenience goods retailers are able to appropriately serve residents of the authority area and those who live in a wider catchment area. In terms of comparison goods retailing, the operators within the authority area generally serve Manchester residents, but there has been an identified decrease in expenditure being spent at the operators within the City Centre across each of the zones.

7.24 In our view, the identified survey results reflect the geography of the Study Area and the relative attraction of other nearby retail venues. Accordingly, where expenditure 'leaks' to destinations outside of Manchester this is still generally reflective of logical and sustainable travel patterns.

8. Assessment of Retail Capacity

8.1 Our retail capacity tables set out our step-by-step approach to estimating the expenditure surplus which is available to support additional retail floorspace and are provided at Appendix 6. A summary of our methodology, together with our findings, is provided below.

General Approach to Estimating Quantitative Capacity

8.2 Retail capacity modelling follows the basic principle that:

Available Expenditure minus Expected Turnover of Existing and Committed Floorspace equals Expenditure Surplus or Deficit.

8.3 An identified quantitative expenditure surplus indicates that there is capacity to support additional retail floorspace. We summarise the key considerations relating to each component of the equation below.

Available Expenditure

8.4 As we set out in Section 5 of this report, expenditure generated within each Study Area zone is calculated by multiplying the population at a given reporting year by the estimated per capita expenditure. The available expenditure takes into consideration:

- estimated population growth;
- forecast increases in per capita expenditure; and
- forecast increases in special forms of trading.

8.5 The expenditure available to retailers within the City of Manchester area is calculated with reference to the market share of convenience and comparison goods expenditure secured by retailers located within the authority area. This is explained in greater detail in the preceding Section 6.

8.6 The expected turnover relates to the level of expenditure claimed by existing retailers (and by retail commitments which benefit from an extant planning permission) such that they trade in a viable manner. For convenience goods retailers, the expected 'benchmark' turnover of existing convenience goods facilities is calculated with reference to GlobalData Convenience and Comparison Goods Sales Densities of Major Grocers and Mintel Retail Rankings data.[19]

Surplus/Deficit

8.7 The expenditure surplus (or deficit) is calculated by subtracting the turnover of existing and committed floorspace from the available expenditure directed to retailers within the City of Manchester authority area. A surplus figure effectively represents an under-provision of retail facilities within the City (and may indicate that additional floorspace could be supported), whereas a deficit would suggest a quantitative over-provision of retail floorspace.

8.8 Although a surplus is presented as a monetary figure, it can be converted to a floorspace requirement through the application of an appropriate sales density. In this regard, the floorspace requirement will vary according to operator and the likely sales density they could achieve. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods

[19] These datasets provide independent analysis of key grocery retailers' declared turnover and the overall floorspace in their portfolio in order to calculate national average sales densities.

sector itself there is significant variation, with electrical retailers typically having higher sales densities than DIY or furniture retailers.

8.9 The turnover of destinations is generally considered with reference to retailers' net sales areas and all of the following floorspace figures are presented on this basis.

8.10 Our methodology in calculating comparison goods capacity necessarily departs from that used in considering convenience goods needs. This is because it is difficult to accurately estimate a benchmark turnover for comparison goods floorspace due to the large number of operators and the variation in the trading performance of floorspace, depending on its location, character, and the nature of the catchment. As a consequence, we adopt the position for comparison goods floorspace that it is trading 'at equilibrium' at base year 2023 (i.e. our survey-derived turnover estimate effectively acts as benchmark).

Consideration of Inflow

8.11 We have also given consideration as to whether there would be any convenience and comparison goods turnover derived as 'inflow' from outside the Study Area.

8.12 The defined Study Area extends beyond the City of Manchester authority area and, as such, is representative of Manchester's primary catchment area. In particular, we believe that the Study Area is sufficiently extensive that there will be very little inflow from beyond this area in respect of convenience goods retailing and in respect of patronage of district centres and local centres. For these facilities, we do not make any allowance in respect of the inflow of expenditure from outside the Study Area.

8.13 Clearly, Manchester city centre itself is a different proposition as a centre of regional importance. The city centre attracts a range of national multiple and independent comparison retailers which provides a unique shopping experience. As such, the city centre draws trade from across Greater Manchester and beyond.

8.14 The in-street survey is extremely helpful in this regard as the data identifies the home postcode sector of all respondents. This means we can determine the proportion of visitors who have travelled from outside of the Study Area relative to the proportion that reside inside.

8.15 We have reviewed the in-street survey responses and find that:

- of those respondents who intended to make food shopping purchases on the day of their visit, 25% reside outside the defined Study Area; and
- of those respondents who intended to make non-food shopping purchases on the day of their visit, 41% reside outside the defined Study Area.

8.16 It is assumed that these figures represent the appropriate estimated inflow allowance in respect of convenience and comparison goods retailing in the city centre. Confirmation in respect of the approach to convenience goods and comparison goods inflow is provided by Tables 5, 6, 25 and 26 of Appendix 6. These tables identify our estimate that city centre retailers benefit from around £26.7m of convenience goods inflow and around £212.0m of comparison goods inflow at 2023. We account for inflow at future reporting years on the basis that it will continue to account for the same proportion of overall comparison goods expenditure going forward.

Future Quantitative Convenience Goods Capacity

8.17 In identifying the requirement for additional convenience goods floorspace, the estimated turnover of the existing collective provision (with reference to the shopping patterns established by the household survey) is compared to its benchmark turnover (which is assumed to be the same figure at the base year of 2023, but thereafter changes to account for Experian's forecasts in respect of the future sales efficiency of convenience goods floorspace).

8.18 As Table 8.1 demonstrates, convenience goods floorspace in the Manchester authority area has an expected benchmark turnover of £1,091.0m at 2023, and an estimated survey derived turnover of £1,086.3m. Once inflow is taken into account, the survey derived turnover increases to £1,113.0m.

8.19 As a consequence, a surplus of £22.0m is identified at 2023, which reduces to a £13.2m at 2028. By 2038, the available convenience expenditure increases to £37.7m and by 2040, the surplus is identified to be £43.3m.

Table 8.1: Quantitative Capacity for Additional Convenience Goods Floorspace in City of Manchester

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Inflow (£m)	Surplus Expenditure (£m)
2023	1,091.0	1,086.3	26.7	22.0
2028	1,096.4	1,083.0	26.6	13.2
2033	1,105.2	1,100.5	27.0	22.4
2038	1,110.8	1,120.9	27.5	37.7
2040	1,113.0	1,128.5	27.7	43.3

Notes: Assumes constant market share (55.3%) of Study Area expenditure claimed by facilities within City of Manchester authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4a of Experian Retail Planner Briefing Note 21; in 2021 prices

8.20 We have consulted with the Council and have been informed of a range of convenience goods commitments across the authority area. These commitments comprise small-scale convenience stores, supermarkets and generally retail floorspace which will likely be occupied (at least in part by convenience goods retailers).

8.21 Full details of all relevant commitments are provided by Table 6c of Appendix 6. We estimate that commitments will have a turnover of £112.7m at 2023, increasing to £114.9m at 2040.

8.22 This is clearly a very significant estimated turnover which is greater than the identified 2040 expenditure surplus. Accordingly, as identified by the below Table 8.2, a negative monetary surplus is identified across the entirety of the plan period to 2040 once commitments are accounted for. In practice, our assessment suggests that there will be an effective quantitative oversupply of floorspace (equating to between 5,200 sq.m and 7,200 sq.m of convenience goods floorspace at 2040).

Table 8.2: Quantitative Capacity for Convenience Goods Floorspace in City of Manchester after Commitments

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2023	22.0	112.7	-90.6	-6,700	-9,200
2028	13.2	113.2	-100.0	-7,400	-10,100
2033	22.4	114.1	-91.8	-6,700	-9,200
2038	37.7	114.7	-77.0	-5,600	-7,700
2040	43.3	114.9	-71.7	-5,200	-7,200

Source: Table 6d of Appendix 6
Notes: Assumes constant market share (55.3%) of Study Area expenditure claimed by facilities within City of Manchester authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4a of Experian Retail Planner Briefing Note 21; minimum floorspace requirement based on an assumed sales density of £13,441 per sq.m at 2023 (which equates to the average sales density of the 'big four' foodstore operators); maximum floorspace requirement based on an assumed sales density of £9,818 per sq.m at 2023 (which equates to the average sales density of discount foodstore operators); in 2021 prices

8.23 Based on the above, we find there to be no quantitative requirement for additional convenience goods floorspace over the plan period.

Future Quantitative Comparison Goods Capacity

8.24 For comparison goods, we assume that floorspace is 'in equilibrium' at the start of an assessment (i.e. its turnover is in line with expectations, and that the sector has evolved to meet local/regional needs).

8.25 Our assessment estimates that the comparison goods turnover of the City of Manchester authority area is £1,008.7m, or £1,159.2m after account is taken of inflow.

8.26 Experian anticipates that improvements in the sales efficiency of existing comparison goods floorspace will outstrip per capita comparison goods expenditure growth in the very short term. As such, a limited surplus expenditure of £12.6m is identified at 2028, which arises due to an increase in the population. We anticipate that the identified expenditure surplus will increase to £75.0m at 2040.

Table 8.3: Quantitative Capacity for Comparison Goods Floorspace in City of Manchester Authority Area

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Inflow (£m)	Surplus Expenditure (£m)
2023	1,159.2	947.1	212.0	0.0
2028	1,237.7	1,021.6	228.7	12.6
2033	1,407.2	1,173.5	262.7	29.0
2038	1,599.9	1,356.3	303.6	60.0
2040	1,684.1	1,437.4	321.8	75.0

Source: Table 26a of Appendix 6
Notes: Assumes constant market share (43.4%) of Study Area expenditure claimed by facilities in the City of Manchester authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4b of Experian Retail Planner Briefing Note 21; in 2021 prices

8.27 Once more, we have consulted with the Council and have been made aware of significant comparison goods retail commitments across the City of Manchester area. Full details of all relevant commitments are provided by Table 26c of Appendix 6. We estimate that commitments will have a turnover of £66.4m at 2023, increasing to £96.5m at 2040.

8.28 The identified commitments are extensive and provide for a significant quantum of floorspace. As a consequence, the commitments extinguish any quantitative need for additional comparison goods floorspace across the entirety of the plan period to 2040.

8.29 Our assessment suggests that there will be an effective quantitative oversupply of floorspace at 2040 which equates to between 2,500 sq.m and 4,200 sq.m. This confirmed below at Table 8.4.

Table 8.4: Quantitative Capacity for Comparison Goods Floorspace in the Manchester Authority Area

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2023	0.0	66.4	-66.4	-11,100	-19,000
2028	12.6	70.9	-58.3	-9,100	-15,600
2033	29.0	80.6	-51.6	-7,100	-12,100
2038	60.0	91.7	-31.7	-3,800	-6,600
2040	75.0	96.5	-21.5	-2,500	-4,200

Source: Table 26d of Appendix 6
Notes: Assumes constant market share (43.4%) of Study Area expenditure claimed by facilities in the City of Manchester authority area; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 21; minimum floorspace requirement based on an assumed sales density of £6,000 per sq.m at 2023; maximum floorspace requirement based on an assumed sales density of £3,500 per sq.m at 2023; in 2021 prices

Convenience and Comparison Qualitative Requirements

8.30 In order to identity particular types of food shopping needs, it is useful to compare the estimated turnover of individual foodstores at 2023 with their expected benchmark trading performance. The benchmark turnover of foodstores is calculated with reference to GlobalData Convenience and Comparison Goods Sales Densities of Major Grocers and Mintel Retail Rankings data.[20] Full details of our methodology in this regard and the associated inputs are set out at Table 5 of Appendix 6.

8.31 The trading performance of principal foodstores is identified below in Table 8.5.

8.32 In examining the performance of individual stores, it is evident that discount supermarkets are generally performing well[21] but that the performance of food superstores[22] is more variable.

8.33 There are a total of 17 discount foodstores across the authority area, which collectively have an estimated convenience goods turnover of £263.8m. This is significantly higher than their anticipated benchmark turnover of £145.7m. Our assessment identifies that only four of these discount foodstores 'undertrade', all of which are operated by Lidl.

8.34 The strongest performing discount foodstores are all operated by Aldi. These include: Aldi at Lloyd Street South in Fallowfield (which has an estimated turnover which is 205.1% above benchmark trading level); Aldi at Brookway Retail Park in Baguley (191.3% above benchmark level); Aldi at New Road in Clayton (189.3% above benchmark level); Aldi at Wilmslow Road in Didsbury (168.0% above benchmark level), and Aldi at Altrincham Road in Sharston (109.9% above benchmark).

8.35 There are a total of 13 food superstores across the City. Collectively, these stores have an estimated convenience goods turnover of £538.4m and an estimated convenience goods benchmark turnover of £591.7m. As such, the stores collectively undertrade by £53.3m.

[20] These datasets provide independent analysis of key grocery retailers' declared turnover and the overall floorspace in their portfolio in order to calculate national average sales densities.
[21] In this regard it should be noted that, whilst household survey respondents have in the past perhaps been slightly reluctant to acknowledge that they undertake their main food shop at a discounter, this no longer appears to be the case. In addition, our methodology apportions convenience goods expenditure to foodstore destinations according to their identified market share. The methodology does not take into consideration that similar items are generally cheaper in Aldi and Lidl than in one of the 'big four' operators' stores. As such, the performance of discount operators is probably overstated and the performance of the 'big four' operators is probably understated.
[22] Defined as having a net sales area of more than 2,500 sq.m.

8.36 As identified above, the trading performance of large food superstores is variable. Five superstores overtrade albeit two of them only marginally. The three superstores which trade appreciably better than benchmark level are: Tesco Extra at Burnage Lane in Burnage (which has an estimated turnover which is 42.3% greater than its benchmark trading level); Asda at Harpurhey Shopping Centre (35.8% greater than benchmark); and Tesco Extra at Altrincham Road in Baguley (22.1% greater than benchmark).

8.37 Our survey identifies a number of stores which undertrade significantly. These include: Sainsbury's at Heaton Park Road in Higher Blackley (which has an estimated turnover which is 58.4% below its benchmark trading level); Morrisons at Lime Square in Openshaw (51.7% below benchmark); Asda at Ashton New Road in Eastlands (46.6% below benchmark); and Tesco Extra at Hyde Road in Gorton (34.4% below benchmark).

Table 8.5 Performance of Convenience Goods Floorspace at Principal Foodstores at 2023

Zone	Store	Benchmark Turnover (£m)	Survey Derived Turnover Including Inflow (£m)	Performance Relative to Benchmark (£m)	Performance Relative to Benchmark (%)
1	Aldi, Market Street, Manchester	16.4	30.4	+14.0	+85.5%
1	Aldi, Great Ancoats Street, Manchester	8.3	15.5	+7.3	+87.6%
1	Lidl, Piccadilly Gardens, Manchester	8.2	3.7	-4.4	-54.4%
1	Tesco Express, Market Street, Manchester	15.9	14.6	-1.3	-8.2%
2	Lidl, Cheetham Hill Road,	10.9	10.7	-0.2	-1.5%
2	M&S, Manchester Fort Shopping Park, Manchester	11.1	2.6	-8.5	-76.7%
2	Tesco, Cheetham Hill Road, Cheetham Hill	39.6	40.2	+0.6	+1.6%
3	Asda, Harpurhey Shopping Centre	41.2	55.9	+14.7	+35.8%
3	Lidl, Upper Conran Street, Harpurhey	5.8	4.2	-1.6	-27.9%
3	Sainsbury's, Heaton Park Road, High Blackley	71.5	29.7	-41.8	-58.4%
3	Tesco, Victoria Avenue East, Blackley	19.1	11.7	-7.4	-38.8%
4	Lidl, Old Church Street, Newton Heath	5.9	5.4	-0.5	-8.3%
5	Aldi, Ashton New Road, Clayton	9.5	27.4	+17.9	+189.3%
5	Asda, Sport City, Eastlands	90.4	48.2	-42.1	-46.6%
5	Lidl, Ashton Old Road, Openshaw	7.6	8.0	+0.4	+5.7%
5	Morrisons, Lime Square, Openshaw	40.1	19.4	-20.7	-51.7%
6	Asda, Stanley Grove, Longsight	35.7	30.9	-4.8	-13.4%
6	Lidl, Stanley Grove, Longsight	5.8	7.9	+2.1	+35.6%
6	Lidl, Wilmslow Road, Rusholme	5.0	15.3	10.4	+147.1%
7	Aldi, Garratt Way, Gorton	9.5	19.0	+9.5	+99.9%
7	Tesco Extra, Hyde Road, Gorton	47.5	31.2	-16.3	-34.4%
8	Iceland, Stockport Road, Levenshulme	4.2	3.0	-1.2	-28.9%
9	Aldi, Lloyd Street South, Fallowfield	8.2	24.9	-16.7	+205.1%
9	Sainsbury's, Wilmslow Road, Fallowfield	38.8	40.0	+1.2	+3.1%
10	Asda, Princess Road, Hulme	48.6	43.5	-5.1	-10.4%
11	Morrisons, Wilbraham Road, Chorlton	16.5	32.1	+15.6	+94.9%
12	Aldi, Kingsway, Burnage	8.0	15.7	+7.7	+96.1%
12	Tesco, Burnage Lane, Burnage	38.8	55.2	+16.4	+42.3%

Zone	Store	Benchmark Turnover (£m)	Survey Derived Turnover Including Inflow (£m)	Performance Relative to Benchmark (£m)	Performance Relative to Benchmark (%)
13	Aldi, Wilmslow Road, Didsbury	8.3	22.2	+13.9	+168.0%
13	Tesco, Parrs Wood Road, East Didsbury	25.6	42.9	+17.4	+67.9%
15	Aldi, Brookway Retail Park, Baguley	8.4	24.6	+16.2	+191.3%
15	Lidl, Timpson Road, Manchester	11.6	11.0	-0.6	-5.2%
15	Tesco Extra, Altrincham Road, Baguley	44.3	54.1	+9.8	+22.1%
16	Aldi, Altrincham Road, Sharston	8.4	17.7	+9.3	-109.9%

Source: Table 5 of Appendix 6
Notes: The above summary table provides details of the trading performance of foodstores with a convenience goods net sales area of 600 sq.m or greater; in 2021 prices

8.38 The identified position in respect of stores' trading performance suggests that there will likely be ongoing interest from discount operators for additional representation.

8.39 It is also notable that a significant level of overtrading occurs within Zone 9 (Fallowfield), Zone 11 (Chorlton and Whaley Range), Zone 12 (Burnage and Withington), Zone 13 (Didsbury), Zone 15 (Baguley and Northern Moor), and Zone 16 (Wythenshawe). Some of these areas[23] are included in Lidl's current store requirement list.

8.40 Providing for new foodstore developments in sustainable locations could assist in 'levelling out' some of the identified overtrading and provide for additional consumer choice within the authority area. However, we again note that committed developments extinguish identified needs across the City and that there is no quantitative requirement for additional convenience goods floorspace across the Local Plan period to 2040.

8.41 Turning to comparison goods, as would be expected Manchester city centre is the dominant comparison goods destination for Study Area residents. As identified by Table 25 of Appendix 6. the city centre secures an estimated Study Area turnover of £305.1m at 2023, which is increased to £517.1m once account is taken of inflow.

8.42 Other popular comparison goods shopping venues for Study Area residents are the Trafford Centre (which has an estimated Study Area-derived turnover of £121.1m at 2023) and Manchester Fort (which has an estimated Study Area-derived turnover of £123.0m at 2023 (which includes the B&Q and M&S)).

8.43 The Study suggests that more than half of Manchester city centre's turnover originates from clothing and footwear shopping. This sector also supports the majority of the Trafford Centre's turnover. It is unusual to have two comparison goods destinations in close proximity which are able to attract visitors from across the North West, and in qualitative terms the Study Area is considered to be well provided for in terms of choice. It will be important to consider future proposals for additional comparison goods floorspace in accordance with 'town centre first' planning policy principals, particularly when this relates to floorspace that could be occupied by clothing and footwear occupiers so as not to diminish Manchester city centre's market share and regional shopping role.

8.44 Table 25 of Appendix 6 identifies that Wythenshawe district centre has an estimated comparison goods turnover of £49.5m at 2023 (which includes the Asda and B&M turnovers). This is considered to be a moderate turnover relative to the scale of the district centre and the role it has previously served for residents in the southern part of the City. A large proportion of this turnover is claimed by the Asda superstore in the Civic Centre.

[23] Including Burnage, Didsbury, Whalley Range and Wythenshawe.

8.45 In practice, Wythenshawe's comparison goods function is principally focused on day-to-day retail which often relates to household goods and chemist and beauty products. In this regard, its comparison goods offer is similar to that which may be available within a large district centre. This is considered symptomatic of wider market shares which have impacted on the general role and performance of smaller town centres (including, in the Greater Manchester area, centres such as Stockport and Stretford).

9. Assessment of Leisure Capacity

9.1 The commercial market overview and market research undertaken as part of this Study indicates the importance of leisure and food and drink floorspace in helping to support the future vitality and viability of defined centres. As such, ensuring policies are appropriately worded to allow for such uses within centres, alongside the more traditional retail offer is key. In doing so, it is also important to recognise that town centre living also helps to support both the daytime and evening economy, through additional activity, footfall and expenditure.

9.2 Given the above, our approach in considering leisure capacity is in two parts.

9.3 For food and beverage floorspace, we adopt a similar approach as to that set out in respect of retail floorspace in the preceding Section 8 of this report. In assessing the potential growth in leisure expenditure and resultant capacity for additional food and beverage floorspace within the authority area, and specifically the city centre, although we allow for a level of inflow calculated from the in-street survey results, the wider benefits associated with: the improvements to the AO Arena; the opening of the Factory and the Co-op Arena; and the overarching strength of the city centre in providing for a diverse leisure offer, also needs to be taken into consideration in formulating recommendations. We provide further commentary on these developments below.

9.4 For large format commercial uses, we adopt a 'benchmarking' approach where we consider the typical population required to support different types of facilities. The benchmarking exercise reflects the fact that large format commercial uses are relatively limited in number and residents may be prepared to travel to watch a film or to go ten pin bowling. The current Study Area market share may not be instructive in respect of identifying future large format leisure requirements and therefore our preference is to undertake a benchmarking exercise.

Food and Beverage Requirements

Leisure Expenditure Growth

9.5 To calculate per capita food and beverage expenditure, we have again utilised Experian Micromarketer G3 data. The base year for this expenditure data is also 2021. Experian provides separate per capita expenditure estimates on a zonal basis for 'restaurant and café meals per person' and 'alcoholic drinks (away from home) per person'.

9.6 There is no need to make allowance for special forms of trading expenditure (given that all food and beverage expenditure identified by Experian relates to eating and drinking in bars, pubs, cafes, and restaurants).

9.7 ERPBN21 provides annual leisure expenditure growth forecasts which we set out at the below Table 9.1. These growth rates are used to estimate increases in per capita food and beverage expenditure across the plan period to 2040. The leisure sector growth rate at 2022 is extremely high, but this is an exceptional occurrence representing the 'bounce back' experienced by the sector following the imposition of Covid-related trading restrictions in 2020 and 2021.

Table 9.1: Experian Retail Planner Briefing Note 21 Leisure Expenditure Annual Per Capita Growth Rates

Year	Leisure Per Capita Annual Growth
2022	21.3
2023	-1.3
2024	-0.3
2025	0.6
2026- 30	1.1
2031-40	0.8

Source: Figure 1a of Appendix 3 of Experian Retail Planner Briefing Note 21 (February 2024)

9.8 We again recognise that growth in expenditure forecasts in the longer-term should be treated with caution given the difficulties in predicting economic performance over such an extensive timeframe. Furthermore, it is important to note that Experian's forecasts are national averages based on an overarching consideration of the leisure sector. There is a likelihood that the growth in available leisure expenditure in Manchester city centre could be higher than elsewhere in light of the qualitatively different offer the city centre provides in terms of leisure facilities, such as Aviva Studios, the refurbishment of the AO Arena and the potential benefits associated with the new Co-op Arena.

9.9 The strength of the leisure offer within the authority area, and specifically the city centre, is apparent through the market research undertaken as part of this Study. In this regard, the results of the in-street survey demonstrates that the main reason for visiting the city centre for 14.5% of respondents was to visit a pub/café/restaurant and a further 10.5% stated that it was for visiting an entertainment or leisure facility. In addition, 21.0% of respondents stated that they had bought food or drink at restaurants/bars/pubs, with 37.5% also confirming that one of the things they like about the city centre is the range or quality of leisure facilities.

9.10 Furthermore, the healthcheck and specifically the composition of uses within the city centre identified that over 52% of the commercial floorspace is occupied by leisure operators, with over 44% of the stock of commercial units occupied by leisure operators.

9.11 Overall, it is clear that the city centre's leisure offer is key in both supporting its current and future vitality and viability and that the future success and further growth of the leisure offer will not only be led by the wider commercial market trends but also the draw of the wide range of leisure destinations within the city centre.

9.12 Accepting this caveat, we are able to use Experian's recommendations in respect of annual expenditure growth to calculate expenditure across the food and beverage sectors at 2023, 2028, 2033, 2038, and 2040.

Restaurant and Café Floorspace Requirements

9.13 Based on the assumed Study Area resident population and the available per capita restaurant and café expenditure, we estimate that £472.6m of such expenditure originates within the Study Area at 2023. The below Table 9.2 indicates that available Study Area restaurant and café expenditure is forecast to increase to £581.6m at 2040.

Table 9.2: Total Available Study Area Restaurant and Café Expenditure

2023 (£m)	2028 (£m)	2033 (£m)	2038 (£m)	2040 (£m)
472.6	500.4	536.3	568.5	581.6

Note: In 2021 prices

9.14 Table 9.3 indicates that this represents an increase of £108.9m (or 23.0%) across the Study Area between 2023 and 2040.

Table 9.3: Growth in Available Study Area Restaurant and Café Expenditure

Growth 2023-40 (£m)
108.9

Note: In 2021 prices

9.15 Our complete restaurant and café quantitative assessment model is provided at Appendix 7 of this Study. Table 4 of Appendix 7 identifies that £245.5m (51.9%) of Study Area eating out expenditure is directed to cafes and restaurants in the authority area at 2023.

9.16 Once again, Manchester city centre is of regional importance as a leisure venue. Tourists visit the city centre as part of a visit to watch football, take in a show or concert, or just to sample the range of bars and restaurants. The food and beverage sector clearly benefits substantially from this additional expenditure.

9.17 The in-street survey is again of assistance in identifying the home postcode sector of all survey respondents. From the survey results, we find that nearly half – 48% – of respondents who intended to eat and drink in bars and restaurants on the day of their visit reside outside the defined Study Area. It is assumed that this figure provides an estimate of the appropriate inflow allowance in calculating the overall turnover attracted to both cafes and restaurants, and to licensed premises.

9.18 Table 4 of Appendix 7 identifies our estimate that cafes and restaurants within the city centre have survey-derived turnover of around £129.8m at 2023. This increases to an estimated £249.6m after allowance is made for the inflow of expenditure. Once this is added to other expenditure committed across the authority area, we estimate that the authority area has a café and restaurant turnover of around £365.5m at 2023.

9.19 Our methodology accounts for the fact that existing operators will look to increase their turnover going forward to remain viable. Based on assumed expenditure growth and existing operators increasing their sales efficiency in accordance with Experian's forecasts.[24]

9.20 On this basis, we identify an expenditure surplus of £20.8m at 2028. Due to subsequent expenditure and population increases, this surplus increases to £42.6m at 2033, to £63.8m at 2038, and to £72.4m at 2040. As with retail capacity, this monetary surplus can be converted into a floorspace requirement. The average sales density of UK floorspace was around £8,584 per sq.m at 2023.[25]

9.21 Based on this sales density (and allowing for future increases in the sales efficiency of leisure floorspace going forward), we estimate that 2,400 sq.m of additional café and restaurant floorspace could be supported at 2028, increasing to 8,700 sq.m at 2040.

[24] As set out in Figure 2 of Experian Retail Planner Briefing Note 21 – Leisure.
[25] As also identified by Figure 2 of Experian Retail Planner Briefing Note 21 – Leisure.

Table 9.4: Quantitative Capacity for Restaurant and Café Floorspace in the City of Manchester Authority Area

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Inflow (£m)	Surplus Expenditure (£m)	Floorspace Requirement (sq.m)
2023	365.5	245.5	120.0	0.0	0
2028	366.2	259.9	127.1	20.8	2,400
2033	372.1	278.5	136.2	42.6	5,100
2038	375.8	295.3	144.4	63.8	7,700
2040	377.3	302.0	147.7	72.4	8,700

Source: Tables 5a and 5b of Appendix 7
Notes: Assumes constant market share (51.9%) of Study Area expenditure claimed by facilities in the City of Manchester authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 2 of Experian Retail Planner Briefing Note 21 - Leisure; in 2021 prices

Licensed Premises Floorspace Requirements

9.22 Based on the assumed Study Area resident population and the available per capita alcoholic drinks expenditure, we estimate that £268.4m of alcoholic beverage expenditure originates within the Study Area at 2023. The below Table 9.5 indicates that available Study Area licensed premises expenditure is forecast to increase to £330.8m at 2040.

Table 9.5: Total Available Study Area Licensed Premises Expenditure

2023 (£m)	2028 (£m)	2033 (£m)	2038 (£m)	2040 (£m)
268.4	284.4	304.9	323.3	330.8

Note: In 2021 prices

9.23 Table 9.6 indicates that this represents an increase of £62.4m (or 23.2%) across the Study Area between 2023 and 2040.

Table 9.6: Growth in Available Study Area Licensed Premises Expenditure

Growth 2023-40 (£m)
62.4

Note: In 2021 prices

9.24 Our complete licensed premises quantitative assessment model is provided at Appendix 7 of this Study. Table 9 of Appendix 7 identifies that £173.0m (equating to 64.5%) of Study Area alcoholic drink expenditure is directed to licensed premises in the City of Manchester (the authority area) at 2023.

9.25 Of this, £96.1m of Study Area expenditure is claimed by licensed premises located within Manchester city centre. This increases to an estimated £184.7m after allowance is made for the inflow of expenditure. Once this is added to other expenditure committed across the authority area, we estimate that the City of Manchester has a licensed premises turnover of around £261.7.0m at 2023.

9.26 Once again, our methodology accounts for the fact that existing operators will look to increase their turnover going forward to remain viable. On this basis, we identify an expenditure surplus of £15.1m at 2028. Due to subsequent expenditure and population increases, the identified surplus increases to £30.9m at 2033, to £46.2m at 2038, and to £52.3m at 2040.

9.27 Once again, this monetary surplus can be converted into a floorspace requirement. Based on the average UK leisure sales density of £8,584 sq.m at 2023 (and allowing for future increases in the sales efficiency of leisure floorspace going forward), we estimate that 1,800 sq.m of additional licensed premises floorspace could be supported at 2028, increasing to 6,300 sq.m at 2040.

Table 9.7: Quantitative Capacity for Licensed Premises in the City of Manchester Authority Area

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Inflow (£m)	Surplus Expenditure (£m)	Floorspace Requirement (sq.m)
2023	261.7	173.0	88.7	0.0	0
2028	262.2	183.3	94.0	15.1	1,800
2033	266.4	196.5	100.7	30.9	3,700
2038	269.1	208.4	106.8	46.2	5,500
2040	270.2	213.2	109.3	52.3	6,300

Source: Tables 10a and 10b of Appendix 7
Notes: Assumes constant market share (64.5%) of Study Area expenditure claimed by facilities in the City of Manchester authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 2 of Experian Retail Planner Briefing Note 21 - Leisure; in 2021 prices

Commercial Leisure: Bingo, Cinemas, Ten Pin Bowling and Casinos

9.28 Our approach in identifying the potential for large format to the assessment of commercial leisure needs necessarily departs from a monetary assessment. This is because the commercial leisure sector is different to the retail and food and beverage sectors; large-scale leisure uses are relatively limited in number and customers often expect to travel at least some distance in order to access them. As such, we believe it is sensible to consider the general appropriateness of provision on a Study Area basis, with reference to the typical number of persons required to support particular uses.

9.29 Our assessment considers the typical population required to support bingo halls, casinos, cinema screens and ten pin bowling alleys, and is based around three key stages. We recognise that some of these facilities are not as important as they perhaps once were in underpinning the local leisure economy. However, all four uses generally occupy large format premises and, as such, if a requirement were to be identified then there are potential land use implications.

9.30 We firstly calculate the expected Study Area and local authority populations for the relevant reporting years (2023, 2028, 2023, 2038, and 2040).

9.31 We then calculate the number of persons required to support a bingo hall, casino, cinema screen and bowling alley nationally, across the UK. We have identified the current level of provision across the UK with reference to the following sources:

- Mintel's Casinos and Bingo UK report (March 2019), which identifies that there are 350 bingo halls and 145 casinos across the UK;
- the UK Cinema Association website[26] which identifies that there are 4,637 cinema screens across the UK; and estimated population growth; and
- Mintel's Ten Pin Bowling UK report (May 2017), which identifies that there are 5,242 bowling lanes across the UK.

9.32 We then apply the respective ratio to the Study Area population and to the population of the City of Manchester authority area to gauge the benchmark level of provision, based on the position evident across the UK.

[26] www.cinemauk.org.uk, consulted on 15 September 2023.

9.33 We supplement our assessment with an overview of current patterns of commercial leisure trips throughout the Study Area (as identified by the NEMS household survey of December 2022) to help identify any qualitative deficiencies in provision. /

Bingo

9.34 Mintel's March 2019 Casinos and Bingo UK report identifies that there are 350 bingo halls across the UK, which equates to a bingo hall for every 195,377, persons or thereabouts.[27] Accordingly, based on a Study Area population of 900,467, we estimate that the Study Area could theoretically support around 4.6 bingo halls at 2023, increasing slightly to 4.9 bingo halls at 2040.

9.35 We estimate that the population of the City of Manchester is around 61.6% of the population of the Study Area at 2023. Therefore, on a pro rata basis, we calculate a quantitative requirement for around 2.8 bingo halls in the City of Manchester at 2023 which increases to 2.0 halls at 2040.

9.36 The below Table 9.8 confirms bingo hall capacity across the Study Area and within the City of Manchester over the period to 2040.

Table 9.8: Bingo Hall Capacity in Study Area and the City of Manchester Authority Area

Year	Study Area Population	Typical Population Required to Support Hall	Potential Number of Halls Supported in the Study Area	Proportion of Study Area Population in the Manchester Authority Area (%)	Potential Number of Halls Supported in the Manchester Authority Area	Outstanding Potential Capacity in the Manchester Authority Area
2023	900,467	195,377	4.6	61.6%	2.8	1.8
2028	918,914	195,377	4.7	61.4%	2.9	1.9
2033	937,840	195,377	4.8	61.4%	2.9	1.9
2038	955,370	195,377	4.9	61.2%	3.0	2.0
2040	961,885	195,377	4.9	61.1%	3.0	2.0

Note: Typical population to support bingo hall calculated with reference to the Mintel Casinos and Bingo UK 2019 report and to the ONS 2023 population forecasts for the UK

9.37 At present, there is a single bingo hall in the City of Manchester, this being Club 3000 at Hyde Road in Belle Vue. The nearby Buzz Bingo at Kirkmanshulme Lane closed in March 2023, and the same operators closed halls in Harpurhey and Wythenshawe in 2020. The Study Area is also served by Club 3000 bingo halls at Chester Road in Old Trafford and at Manchester New Road in Middleton, and by the Mecca Bingo at Washway Road in Sale and by the Club 3000 at Ellesmere Shopping Centre in Worsley.

9.38 Unsurprisingly, the household survey results find that the Club 3000 at Belle Vue is the most popular destination for bingo trips which originate within the Study Area, securing 27.9% of last visits to such a facility. This is then followed by the Club 3000 at Old Trafford (which secures 20.6% of trips), the Club 3000 at Middleton (8.2%), the Mecca at Sale (7.7%), and the Club 3000 at Worsley (5.6%). The traditional offer is supplemented by occasional events and social clubs and other venues across the City.

9.39 The bingo sector has been significantly affected by the ban on smoking in enclosed workplaces which came into force in 2007 following the enactment of the Health Act 2006. Subsequent to the Act being enforced, new bingo hall openings have been rare, and we consider it highly unlikely that there will be any proposals to provide

[27] Based on 2020-Based Population Projections by the Office for National Statistics which identify a UK population of 67,844,000 persons at 2023.

additional facilities in the Study Area in the foreseeable future. There is significant provision available just outside the Study Area which is generally able to help meets needs in a sustainable manner.

Cinemas

9.40 The UK Cinema Association website estimates that there are 4,637 cinema screens in the UK[28], which equates to one screen for every 14,801 persons or thereabouts. On this basis, we estimate that the Study Area population could support around 60.8 cinema screens at 2023, increasing to around 65.0 screens at 2040.

9.41 Once more, we estimate that the population of the City of Manchester is around 61.6% of the population of the Study Area at 2023. On a pro rata basis, this equates to a quantitative need for around 37.5 cinema screens to support Manchester's population at 2023, increasing to a need for around 39.7 screens at 2040.

9.42 As one would expect of a regional centre, there are a number of cinema screens in the city centre and across the wider Manchester area. These comprise: Vue at Printworks (20 screens); Odeon at Great Northern on Deansgate (16 screens); Cineworld at Parrs Wood in Didsbury (11 screens); Home at First Street (five screens); and Everyman at Spinningfields (three screens). Collectively, these facilities provide a total of 55 screens and extinguish any quantitative need for additional facilities. Indeed, our assessment identifies an effective overprovision of screens based on this benchmarking assessment.

Table 9.9: Cinema Screen Requirement in Study Area and the City of Manchester Authority Area

Year	Study Area Population	Typical Population Required to Support Cinema Screen	Potential Number of Cinema Screens Supported by Study Area	Proportion of Study Area Population in the Manchester Authority Area (%)	Potential Number of Cinema Screens Supported in the Manchester Authority Area	Outstanding Potential Capacity in the Manchester Authority Area
2023	900,467	14,801	60.8	61.6%	37.5	-17.5
2028	918,914	14,801	62.1	61.4%	38.1	-16.9
2033	937,840	14,801	63.4	61.4%	38.9	-16.1
2038	955,370	14,801	64.5	61.2%	39.5	-15.5
2040	961,885	14,801	65.0	61.1%	39.7	-15.3

Note: Typical population to support a cinema screen calculated with reference to data provided by the UK Cinema Association website and to the ONS 2023 population forecasts for the UK

9.43 Looking at the results of the household survey, the most visited cinema destinations within the Study Area are: Vue at Printworks (the destination for 22.3% of respondents' last visit); Cineworld at Parrs Wood (16.9%); Odeon at the Trafford Centre (in Trafford authority area) (10.8%); Cineworld at Ashton Moss Retail Park (in Tameside) (9.9%); and Odeon at Deansgate (8.9%).

9.44 Whilst some trips are committed to cinemas outside the Study Area, they are closely related to more peripheral zones and such trips are therefore considered to be generally reflective of sustainable travel patterns.

Ten Pin Bowling

9.45 Mintel's Ten Pin Bowling UK 2017 report identifies that there are 5,242 ten pin bowling lanes across the UK, which equates to a bowling lane for every 13,045 persons or thereabouts.

[28] At 2022.

9.46 Accordingly, we estimate that the Study Area could support around 69.0 bowling lanes at 2023, increasing to around 73.7 lanes at 2040. Given that the estimated population of the City of Manchester is around 61.6% of that of the Study Area at 2023, we estimate that there is capacity to support around 42.5 bowling lanes in the City at 2023, increasing to 45.1 lanes at 2041.

9.47 In this context, we note that there is extensive ten pin bowling provision in the form of: Ten Pin at Parrs Wood in Didsbury (26 lanes); Ten Pin at Printworks (14 lanes); Lane 7 at Great Northern on Deansgate (11 lanes); and Dog Bowl at Whitworth Street West (five lanes). Collectively there are 56 lanes within the City of Manchester. This is supplemented by further provision just outside the Study Area, which includes Atlantic Bowl in Altrincham, Hollywood Bowl in Ashton, and Namco at the Trafford Centre.

9.48 Given the level of provision, there is no quantitative requirement for additional ten pin bowling facilities across Manchester in the period to 2040.

9.49 The household survey identifies that Ten Pin at Parrs Wood is by far the most popular facility (securing 36.5% of last trips to bowling alleys which originate within the Study Area) followed then by Ten Pin at the Printworks (10.6) and then by Lane 7 at Great Northern (8.7%).

9.50 The survey indicates that the traditional large format family-orientated bowling alleys remain the most popular facilities in the City. This is unsurprising given their size and location. However, both Lane 7 and Dog Bowl provide a smaller 'boutique' format which is focused around a strong food and drink offer as well as the bowling itself. The location of these facilities (close to Deansgate and the strong hospitality offer around Oxford Road) is such that patrons are able to go bowling as part of a bigger night out. We again note the additional ten pin bowling provision which is located just beyond the Study Area but which is accessible to Manchester residents and find that the area is already well provided for in respect of bowling facilities.

Table 9.10: Ten Pin Bowling Lane Requirement in Study Area and the City of Manchester Authority Area

Year	Study Area Population	Typical Population Required to Support Bowling Lane	Potential Number of Bowling Lanes Supported by Study Area	Proportion of Study Area Population in the Manchester Authority Area (%)	Potential Number of Bowling Lanes Supported in the Manchester Authority Area	Outstanding Potential Capacity in the Manchester Authority Area
2023	900,467	13,045	69.0	61.6%	42.5	-13.5
2028	918,914	13,045	70.4	61.4%	43.3	-12.7
2033	937,840	13,045	71.9	61.4%	44.1	-11.9
2038	955,370	13,045	73.2	61.2%	44.8	-11.2
2040	961,885	13,045	73.7	61.1%	45.1	-10.9

Note: Typical population to support ten pin bowling alley calculated with reference to the Mintel Ten Pin Bowling UK 2017 report and to the ONS 2023 population forecasts for the UK

Casinos

9.51 Mintel's Casinos and Bingo UK 2018 report identifies that there are 145 casinos across the UK, which equates to a casino for every 467,890 persons or thereabouts. Accordingly, we estimate that the Study Area could support around 0.4 casinos at 2023, a figure which would barely change throughout the Study period. Given that the estimated population of Manchester is around 61.6% of that of the Study Area at 2023, and there are five existing casino facilities, we identify an oversupply of casino provision within the Manchester authority area of 3.8 casinos.

Table 9.11: Casino Requirement in Study Area

Year	Study Area Population	Typical Population Required to Support a Casino	Potential Number of Casinos Supported by Study Area	Proportion of Study Area Population in the Manchester Authority Area (%)	Potential Number of Casinos Supported in the Manchester Authority Area	Outstanding Potential Capacity in the Manchester Authority Area
2023	900,467	471,600	1.9	61.6%	1.2	-3.8
2028	918,914	471,600	1.9	61.4%	1.2	-3.8
2033	937,840	471,600	2.0	61.4%	1.2	-3.8
2038	955,370	471,600	2.0	61.2%	1.2	-3.8
2040	961,885	471,600	2.0	61.1%	1.2	-3.8

Note: Typical population to support casino calculated with reference to the Mintel Casinos and Bingo UK 2018 report and to the ONS 2023 population forecasts for the UK, England and Wales, Scotland and Northern Ireland

Other Commercial Leisure

9.52 There has been a growth in recent years in other more specialist commercial leisure attractions, including facilities such as trampoline parks, indoor soft play centres, ninja courses and a range of competitive social destinations. The latter is a fast-paced sector and is still continuing to grow and evolve throughout 2022 and 2023 and into 2024, with new formats becoming present in the market. Such uses include urban golf, bar and game formats, which include games such as axe-throwing, shuffleboard, table tennis and so on, virtual reality gaming and escape rooms. All of these commercial leisure uses fall within the defined town centre use bracket, and typically require large floorplates.

9.53 Calculating a quantitative need for such uses is not possible, particularly given the evolving market and relative infancy of such uses. However, we are able to review the existing offer and consider whether there may be a qualitative requirement to increase the offer across the authority area.

9.54 Looking firstly at trampoline parks, the authority area is served relatively well, with facilities including Flip Out located adjacent to the Asda store at Eastlands and Kickair in proximity to the AO Arena. Both Flip Out and Kickair are positioned in proximity to wider commercial uses, both in terms of Eastlands and the commercial offer in the city centre, and therefore benefit the wider centres to some degree.

9.55 This is particularly the case given that such facilities need large format, often former warehouse or large retail facilities to be able to provide the required space both horizontally and vertically to house the operation. There are also a number of large adventure style commercial facilities within Trafford Park including Inflatanation, Total Ninja and The Depot, which although are not located within the Manchester authority area, do provide relatively accessible facilities for residents close to the city centre.

9.56 Turning to competitive leisure facilities, the city centre in particular is well served by facilities such as 'breakout rooms', urban mini golf, bar and game facilities and virtual reality experiences. These facilities typically provide a wider offer including a bar and restaurant and encourage longer dwell-times. Such uses are typically found in larger centres, as demonstrated by the concentration within the city centre, but there may be a market demand for such uses within the other larger centres (beyond the city centre) in the authority area.

9.57 Although the market for such commercial leisure uses is still evolving, and alternative operators may still continue to require new premises across the authority area, these should be assessed on a case-by-case basis, ensuring that such uses are directed towards defined centres in the first instance. This is particularly important given the wider benefits such uses can have in terms of encouraging longer dwell-times and increasing footfall and associated expenditure within centres.

Cultural Facilities

9.58 Table 9.12 identifies a number of larger-scale cultural facilities within the boundary of Manchester city centre and comparator city centres of similar size and/or regional role. The table indicates that Manchester is well-provided for in terms of these cultural facilities when considered in context of the 'benchmark' figures set out below.

9.59 It is important to note that our review in Table 9.12 focuses on the larger entertainment venues within the city centre, principally those with the ability to accommodate over 1,000 seated people, or with larger floorplates. However, Manchester city centre benefits from a wide range of leisure entertainment facilities which draw in regular footfall, including New Century Hall (800 capacity), Band on the Wall (520 capacity), Canvas (600 capacity) and so on. Not only does the city centre benefit from its permanent leisure facilities, but the wider temporary and often annual events offer such as the Christmas Markets, the Food and Drink Festival and Manchester Pride also provide significant benefits to the wider commercial offer of Manchester city centre.

9.60 We discuss the benefits of these facilities later in the Report.

Table 9.12: Provision of Cultural Facilities in Manchester and Comparator Cities

Facility	Manchester	Birmingham	Liverpool	Leeds	Sheffield	Average
Arenas	1	1	1	1	0	0.8
Concert Halls	2	2	2	0	0	1.2
Galleries	2	1	4	1	2	2.0
Gig Venues	5	2	2	2	6	3.4
Large Multipurpose Leisure Venues	2	1	2	0	0	1.0
Museums	6	6	4	2	1	3.8
Theatres	1	3	2	2	2	2.0
Total	**19**	**16**	**17**	**8**	**11**	**14**

Note: Table only includes venues within the City Centre boundary for each city, as defined in the respective development plans.

Arenas

9.61 For the purposes of Table 9.12, 'arenas' are defined as indoor sports and entertainment venues seating more than 1,000 people. Manchester is in line with the comparator cities of Birmingham, Liverpool and Leeds in having one arena above this size threshold within its defined city centre boundary (Sheffield's Utilita Arena is outside the city centre).[29]

9.62 In terms of seating capacity, Manchester is far above average. Its AO Arena seats 21,000 people, whereas Birmingham's Utilita Arena seats 15,800, Leeds' First Direct Arena seats 13,781 and Liverpool's M&S Bank Arena seats just 11,000 people. This additional provision relative to the other similar cities means that Manchester is able to host larger-scale events which bring more visitors to the city centre to support its vitality and viability.

[29] The Aviva Studios arts venue has been recorded as a 'large multipurpose leisure venue' rather than an 'arena' in Table 9.12 because it encompasses a range of other leisure uses including theatre, music, dance, art and other performance space.

9.63 As discussed in more detail below, the forthcoming Co-op Live arena, which will be able to hold a maximum of 23,500 people, will act as an additional attractor to support Manchester city centre's evening economy. Thus, Manchester will continue to outperform the comparator city centres in terms of arena provision and capacity.

9.64 Once opened, the Co-op Arena is expected to hold up to 120 events annually and is planned to have the largest maximum capacity of any indoor arena in the UK. Alongside the events spaces, the venue will have 32 bars, restaurants and lounges and will provide approximately 3,350 employment opportunities.

Concert Halls

9.65 'Concert halls' are defined in Table 9.12 as buildings designed for the performance of (primarily classical music) concerts seating more than 1,000 people. Manchester has two such venues within its city centre boundary, as do Birmingham and Liverpool. Neither Leeds nor Sheffield has a classical music venue of this size within the defined city centre. Thus Manchester is above or on par with the other city centres in terms of its number of concert halls.

9.66 The Bridgewater Hall and Manchester Opera House concert halls in Manchester city centre have a collective capacity for 4,275 people (having 2,355 and 1,920 seats respectively). For comparison, Birmingham's city centre concert halls can hold up to 3,348 attendees (comprising 2,262 people within the Symphony Hall and 1,086 within Birmingham Town Hall) and Liverpool's capacity amounts to 3,000 people (with 1,700 seats in the Royal Liverpool Philharmonic and 1,300 within St George's Hall). As a consequence, we consider that the provision of concert halls in Manchester city centre is above the benchmark provided by the comparator centres.

Galleries

9.67 'Galleries' are defined in the table as those facilities used for the display of works of art which are accredited by the UK Museum Accreditation Scheme. Liverpool performs strongly in this regard, having more galleries and national museums than any UK city apart from London, whereas the remaining city centres listed in Table 9.12 have either one or two galleries within the defined boundary. Manchester has two accredited galleries in the city centre, these being the Manchester Art Gallery and Whitworth Art Gallery, meaning it is line with the average recorded across the five comparator centres.

Gig Venues

9.68 Table 9.12 defines 'gig venues' as buildings designed for the performance of (primarily popular music) concerts seating more than 1,000 people. Manchester has five venues within its city centre which meet this definition, with most of the other cities having two and with Sheffield having six.[30] Manchester is therefore above average in respect of its quantity of larger venues for popular music gigs.

9.69 With regard to capacity, two of Manchester's venues are much larger than any similar facilities within the comparator city centres, these being Depot Mayfield (10,000 capacity) and Castlefield Bowl (8,000 capacity). As a consequence, the large gig venues in Manchester city centre can host up to 25,970 people, whereas Sheffield's capacity amounts to 8,895 people and each of the city centres of Birmingham, Leeds and Liverpool can host fewer than 6,000 people within their large gig venues.

9.70 Thus, Manchester's large gig venues attract visitors from a wide catchment and it is able to provide for a far higher quantity of users than the comparator cities listed in the table above.

[30] For the purposes of Table 9.12, 'Sheffield city centre' includes the 'University Areas' shown on the adopted Sheffield Development Framework Core Strategy Key Diagram.

Large Multipurpose Leisure Venues

9.71 'Large multipurpose leisure venues' are defined as facilities measuring over 1,000 sq.m gross which offer a mix of leisure uses. An example would be Home in Manchester city centre, which encompasses five cinemas, two theatres and 500 sq.m of gallery space. The new Aviva Studios in Manchester also fits this definition, given that the venue provides for a range of leisure activities including theatre, music, dance, art, and other performance and non-performance related events. In the other comparator cities, we consider that the Custard Factory and Grand Central Hall in Birmingham, and FACT Liverpool meet the definition of large multipurpose leisure venues.

9.72 With two large multi-purpose venues driving footfall and helping to support the evening economy, Manchester is performing well in comparison to the other cities listed in Table 9.2.

Museums

9.73 'Museums' are defined in the table as facilities used for the storage and exhibition of objects of historical, scientific, artistic, or cultural interest which are accredited by the UK Museum Accreditation Scheme. Again, Manchester is above average in terms of its quantity of such facilities (six museums), with only Birmingham city centre offering an equivalent number and the other cities all having fewer than five.

9.74 Moreover, Manchester's variety of city centre museums is excellent, catering to a broad range of interests and attracting diverse groups of visitors. The Museum of Science and Industry is popular for school trips and other large group visits, and the National Football Museum and People's History Museum are among the most visited attractions in the city centre.

Theatres

9.75 'Theatres' are defined in Table 9.12 as facilities where plays and other dramatic performances are given seating over 1,000 people. Manchester only has one dedicated theatre in the city centre which is above this capacity threshold (the Palace theatre with 1,955 seats).

9.76 However, this is complemented by the theatre space within the HOME and Aviva Studios large multipurpose leisure venues, and by the smaller Royal Exchange (700 seats) and Contact (400 seats) theatres elsewhere in the city centre. As a result, we consider that Manchester's provision of theatres is good for a city of its size and role in the retail hierarchy.

Smaller Concert/Events Venues

9.77 Manchester's music offer is well developed, varied and recognised across the World. Independent research carried out on behalf of the Council by Sound Diplomacy and Nordicity in 2022 to review the city's economic landscape and analysing the needs and opportunities of the music sector. The research identifies that the music eco-system in Manchester is a major contributor to the city's economy, which supports thousands of jobs and attracts a significant number of music tourists and users to the city. The report notes that Manchester's live music sector generated £51m for Manchester in 2019, and Manchester is 2nd only to London as a major national music economy.

9.78 As such, Manchester city centre also benefits from a wide range of smaller concert, gig and other leisure venues, providing a diverse offer of facilities for a variety of events and to meet a variety of artists' needs. Facilities such as the Deaf Institute, The Ritz, the Albert Hall and so on, are vital to supporting the music and wider cultural arts industry and provide smaller spaces to support artists.

9.79 The types of events range considerably across the city centre, with the added benefit of providing multiple event spaces which work together to hold wider events and sometimes festivals across the city. Such events not only help to support the future of the event spaces and artists, but also have wider knock-on benefits in terms of drawing footfall and expenditure into the various parts of the city centre.

Overall Conclusion on Provision of Cultural Facilities

9.80 Our overall conclusion on the provision of cultural facilities in Manchester city centre is that it is performing at or well above the relevant benchmarks provided by the comparator cities of Birmingham, Liverpool, Leeds and Sheffield. There are no obvious gaps or deficiencies in provision and Manchester city centre continues to be an important leisure destination for visitors to cultural venues.

Future Opportunities

9.81 Our assessment has identified a significant requirement for additional café and restaurant floorspace (8,700 sq.m across the City by 2040) and licensed premises floorspace (6,300 sq.m across the City by 2040). Accordingly, we believe that these two sectors could account for an additional 15,000 sq.m of floorspace across the authority area over the plan period.

9.82 In practice, much of this floorspace will be delivered in the city centre. The leisure draw of the city centre for both Manchester's residents and visitors alike is clear through both the findings of the healthcheck and the strong offer of leisure facilities, but also the findings of the in-street survey and the proportion of respondents stating that they visit the centre principally to visit the leisure destinations, whether this be the larger venues listed above or the wide range of food and drink facilities. The demand for leisure facilities in the city centre not only comes directly as a result of the facilities and events within the city centre itself, but also from the events held outside of the city centre but which draw footfall and expenditure in. Key facilities and events include the football stadia, the Old Trafford Cricket Ground, events such as Parklife and so on.

9.83 The Co-op Live arena and the Aviva Studios arts venue will act as additional attractors to benefit both the daytime and evening economy more widely. Alongside the wider existing leisure offer of the city centre in terms of cultural facilities and its existing retail, service and financial offer, supporting the future growth of the leisure facilities in the city centre will be a key part of securing its vitality and viability.

9.84 Co-op Live is in walking distance of the city centre for some patrons and it will drive footfall across the eastern part of the centre, along with significant increased demand for wider leisure floorspace across the city as a whole. This includes areas like Ancoats, Mayfield, Piccadilly, and Piccadilly East. Whilst some of these neighbourhoods are established food and beverage destinations, others (such as Piccadilly East and Mayfield) have significant scope for future development. Given the scale of additional residential development that is planned for these areas, it will be important that additional leisure floorspace is complementary to wider regeneration objectives.

9.85 At the time of determination of the application for the Co-op Live, it was reported that when in operation, the arena would directly provide 47 full time and 1,038 part time positions, equating to 585 full time equivalent jobs, many of which would be made available to local residents. During construction, it was also estimated that 3,344 full time equivalent jobs were created and an estimated economic impact of £59.8m GVA in Manchester annually. The substantial investment within this part of the city will not only create jobs, support the local economy and increase the amount of expenditure available from residents and visitors alike to support businesses both locally and within the wider city centre. Alongside the leisure offer discussed above, we also expect this to further the demand for hotel accommodation across the city.

9.86 However, significant opportunities exist around the eastern part of the city centre. This includes London Road Fire Station which is being redeveloped by Allied London as a hotel, workspace, and leisure venue. The industrial character of this part of the city centre already supports large format leisure destinations (including the Diecast and Freight Island food halls, and numerous 'brewery tap' operations), and there are likely to be further opportunities to support both neighbourhood bars, restaurants, and larger format leisure uses.

9.87 Aviva Studios and wider St. John's development is in the process of creating a vibrant new neighbourhood based around the former ITV: Granada Studios site. The intention is to encourage independent, niche and creative uses and businesses with new office, cultural, workspace and leisure development with residential units. Factory will be the anchor of a new enterprise and innovation quarter for the region where new businesses can form and flourish. The presence of Aviva Studios as a 'cultural anchor' has already had a catalytic effect in terms of reimagining the creative redevelopment of the Science and Industry Museum site and the Upper and Lower Campfield Markets as a creative district.

9.88 A recent article published by Manchester City Council[31] reports on the economic and wider benefits of the opening season for Aviva Studios, and specifically the 2023 Manchester International Festival. In doing so, the article notes that:

'The report to Scrutiny also highlights the hugely successful opening season of Aviva Studios, the country's brand-new cultural venue, located here in Manchester, which has seen well over 300,000 visitors pass through its doors since last summer.

Of these, 32 per cent of visitors were from Manchester, 32 per cent from Greater Manchester, and the remaining 36 per cent of visitors were from the rest of the UK and beyond - a clear sign of the impact the building is already making in its first few months of opening and demonstrating that the venue's reach and reputation goes far beyond Manchester alone.'

9.89 It is clear therefore, that Aviva Studios also has the potential to act to drive footfall across the opposite western part of the city centre. This may provide opportunities for additional leisure uses on Deansgate, Liverpool Road, Quay Street, and as part of the new St John's development. The scale and adaptability of Aviva Studios means that it has the ability to attract significant activity to the western part of the city centre throughout the week. In addition to supporting new uses, a cultural attractor in this location may also provide the opportunity to support a different type of operator and provide additional choice in leisure provision around St Johns, Deansgate and Castlefield.

9.90 It is also anticipated that residential development on the southern edge of the city centre (in particular, around the Mancunian Way and Chester Road) brings with it further opportunities for improved retail and leisure provision.

9.91 The population of this part of the city centre has grown considerably in recent years as a consequence of high-rise development in and around the southern gateway. Whilst some retail and service development has been delivered at ground floor within residential developments, it is still considered that this additional population has the potential to support further leisure provision. This may include further bars, cafés and restaurants. An important element of the growth of the population in the city centre is the growth in the younger population, and the student population, both of which significant increases the demand for leisure floorspace.

9.92 The key principles and vision for culture in Manchester were set out in the 2016 Cultural Ambition developed by the sector and adopted by Manchester City Council. A new cultural strategy for 2025-2035 is currently in

31 https://www.manchester.gov.uk/news/article/9422/report_spells_out_economic_and_wider_benefits_of_last_years_manchester_international_festival_and_successful_opening_season_for_aviva_studios

development and will provide the basis for the city, in collaboration with residents, shareholders, cultural organisations and creatives - to re-imagine what makes our place distinctive; to create healthier neighbourhoods; to unlock different types of investment; and bring together activities and initiatives under a unified goal for Manchester. The work on the new strategy started in September 2023 with a public consultation period from 19 October to 31 December. It is expected the Strategy will be finalised and approved by the Council in June or July 2024.

9.93 Beyond the city centre specifically, the population of Greater Manchester is growing (Places for Everyone forecasts that the population will have grown by another 195,000 people by 2039), and this will further drive the demand for additional leisure floorspace within Manchester, and the city centre in particular.

9.94 All of the above supports the ongoing development and diversification of the leisure offer of the city centre and other centres across the authority area. Ensuring that the leisure offer works positively alongside the wider retail, service and financial offer of centres will be key to ensuring residents still have good access to day-to-day amenities, but there is scope to support additional leisure uses, particularly in association with the key growth areas set out above.

9.95 Accordingly, in terms of the identified quantitative need for additional café, restaurant, and licensed premises floorspace, it is considered that such development has the potential to:

- come forward in association with large-scale leisure attractors, which have the potential to expand the city centre evening economy in terms of its geography and overall offer;
- diversify parts of the city centre which have traditionally been somewhat homogenous in terms of the character and appeal (in particular, there may be the potential for a more varied food and beverage offer on Deansgate and within Castlefield and St John's); and
- support both additional large-scale leisure formats (which can sometimes repurpose former industrial premises, generally now found to the east of the city centre) and neighbourhood scale bars and restaurants in association with new residential developments.

10. Summary, Conclusions and Policy Recommendations

Context

10.1 The principal purpose of the Study is to understand future retail and leisure needs, and to provide policy recommendations to assist the Council in its preparation of the forthcoming Local Plan.

10.2 The Local Plan will set out the Council's strategy in respect of delivering new future growth in respect of a range of new developments, including housing, jobs, and main town centre uses. To ensure that commercial uses are delivered in sustainable locations, the Local Plan will provide up to date policies in respect of town centre boundaries, the hierarchy of defined centres, and local impact thresholds of relevance to retail and leisure developments.

10.3 This concluding section of our report summarises the key findings of the Study and addresses planning policy requirements of relevance to retail, leisure, and town centres.

Key Findings: Retail

Quantitative and Qualitative Capacity

10.4 As identified at Section 8, once commitments are taken into account, we do not identify any quantitative capacity for additional convenience or comparison goods floorspace across the authority area.

10.5 In terms of convenience goods, a negative monetary surplus is identified across the entirety of the plan period to 2040 once commitments are accounted for. In practice, our assessment suggests that there will be an effective quantitative oversupply of floorspace (equating to between 5,200 sq.m and 7,200 sq.m of convenience goods floorspace).

10.6 Turning to comparison goods, the commitments extinguish any quantitative need for additional comparison goods floorspace across the entirety of the plan period to 2040. Our assessment suggests that there will be an effective quantitative oversupply of floorspace by 2040 which equates to between 2,500 sq.m and 4,200 sq.m.

10.7 Clearly, the first priority will be to encourage the reuse, refurbishment or redevelopment of vacant floorspace within defined centres. Given the lack of the identified convenience or comparison goods requirement, we do not believe there to be any need to allocate additional sites for comparison goods retail development over the plan period.

10.8 Furthermore, in light of the need to reoccupy vacant units, careful consideration should be given to proposals for any further floorspace which could impact on the vitality and viability of Manchester's defined centres.

10.9 In terms of the qualitative need within the authority area, it is notable that a significant level of overtrading occurs within Zone 9 (Fallowfield), Zone 11 (Chorlton and Whaley Range), Zone 12 (Burnage and Withington), Zone 13 (Didsbury), Zone 15 (Baguley and Northern Moor), and Zone 16 (Wythenshawe). Some of these areas[32] are included in Lidl's current store requirement list.

10.10 Providing for new foodstore developments in sustainable locations could assist in 'levelling out' some of the identified overtrading and provide for additional consumer choice within the authority area. However, we again

[32] Including Burnage, Didsbury, Whalley Range and Wythenshawe.

note that committed developments extinguish identified needs across the city and that there is no quantitative requirement for additional convenience goods floorspace across the Local Plan period to 2040.

10.11 Turning to comparison goods, as would be expected Manchester city centre is the dominant comparison goods destination for Study Area residents. The city centre secures an estimated Study Area turnover of £205.1m at 2023, which is boosted to £517.1m once account is taken of inflow.

10.12 Other popular comparison goods shopping venues for Study Area residents are the Trafford Centre (which has an estimated Study Area-derived turnover of £121.1m at 2023) and Manchester Fort (which has an estimated Study Area-derived turnover of £123.0m at 2023 (which includes the B&Q and M&S)).

10.13 The Study suggests that more than half of Manchester city centre's turnover originates from clothing and footwear shopping. This sector also supports the majority of the Trafford Centre's turnover. It is unusual to have two comparison goods destinations in close proximity which are able to attract visitors from across the North West, and in qualitative terms the Study Area is considered to be well provided for in terms of choice. It will be important to consider future proposals for additional comparison goods floorspace in accordance with 'town centre first' planning policy principals, particularly when this relates to floorspace that could be occupied by clothing and footwear occupiers so as not to diminish Manchester city centre's market share and regional shopping role.

10.14 Table 25 of Appendix 6 identifies that Wythenshawe district centre has an estimated comparison goods turnover of £49.5m at 2023 (which includes the Asda and B&M turnovers). This is considered to be a moderate turnover relative to the scale of the district centre and the role it has previously served for residents in the southern part of the City. A large proportion of this turnover is claimed by the Asda superstore in the Civic Centre.

10.15 In practice, Wythenshawe's comparison goods function is principally focused on day-to-day retail which often relates to household goods and chemist and beauty products. In this regard, its comparison goods offer is similar to that which may be available within a large district centre. This is considered symptomatic of wider market shares which have impacted on the general role and performance of smaller town/larger district centres (including, in the Greater Manchester area, centres such as Stockport and Stretford).

Key Findings: Commercial Leisure

10.16 Our assessment of future leisure needs is in two parts.

10.17 In terms of food and beverage floorspace, we have undertaken a quantitative assessment which identifies available expenditure and takes account of the need for existing businesses to increase their turnover to remain viable.

10.18 Once inflow has been accounted for, our assessment has identified that at 2040 there is a requirement for 8,700 sq.m of restaurant and café floorspace and for 6,300 sq.m of licensed premises floorspace (this equating to a total of 15,000 sq.m of food and beverage floorspace).

10.19 We anticipate that this floorspace will comprise of relatively small-scale cafés, restaurants and bars which would generally be accommodated within the city centre and the larger district centres.

Table 10.1: Quantitative Capacity for Restaurant and Café Floorspace and Licensed Premises Floorspace in the Manchester Authority Area

Year	Restaurant and Café Floorspace Requirement (sq.m)	Licensed Premises Floorspace Requirement (sq.m)	Total Food and Beverage Floorspace Requirement (sq.m)
2023	0	0	0
2028	2,400	1,800	4,200
2033	5,100	3,700	8,800
2038	7,700	5,500	13,200
2040	8,700	6,300	15,000

Source: Tables 5b and 10b of Appendix 7
Note: Assumes constant market share of Study Area expenditure claimed by facilities in the Manchester authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 2 of Experian Retail Planner Briefing Note 21 - Leisure; in 2021 prices

10.20 We have undertaken a quantitative benchmarking exercise to identify general requirements in respect of large format leisure uses.

10.21 This has identified quantitative capacity which equates to a requirement across the Manchester authority area at 2040 for:

- 2.0 bingo halls;
- -15.3 cinema screens;
- -10.9 ten pin bowling lanes; and
- -3.8 casinos.

10.22 The bingo hall requirement is of a modest scale, and we consider it highly unlikely that there will be any proposals to provide additional facilities in the Study Area in the foreseeable future.

10.23 We do not anticipate there to be operator demand to bring forward larger format leisure uses in Manchester over the period to 2040. The exception to this could be if there were potential for a cinema screen within the authority area as part of a flexible arts venue or as a single screen independent to secure the re-use of an existing building. We believe that any such opportunity would be operator or venue-led and we do not believe that it is necessary for the Council to proactively plan to accommodate any such use in practice.

10.24 Our assessment has identified a significant requirement for additional café and restaurant floorspace (8,700 sq.m across the city by 2040) and licensed premises floorspace (6,300 sq.m across the City by 2040). Accordingly, we believe that these two sectors could account for an additional 15,000 sq.m of floorspace across the authority area over the plan period.

10.25 As noted throughout this Study, the leisure and cultural sector is key in supporting Manchester's economy, and specifically a vital aspect currently supporting the overarching vitality and viability of Manchester city centre. The city centre benefits from a range of leisure and cultural facilities, from large scale arenas and theatres through to smaller niche venues, all of which support a wide variety of artists. Not only is there a wide offer of permanent leisure facilities, but the city centre also hosts a spectrum of temporary events throughout the year which draw in visitors from all over the world. Indeed, the Council's own article cited in Section 9 above notes that the 2023 Manchester International Festival attracted over 325,000 visitors to the city and generated £39.2m of economic activity. This is just one of a long list of events which take place across Manchester throughout the year, all of which draw in footfall and importantly, additional expenditure to support facilities across the city. This further supports the identified capacity as set out at paragraph 10.24 above.

10.26 In this regard, the Co-op Live arena and the Aviva Studios arts venue will act as additional attractors to benefit both the daytime and evening economy more widely. Alongside the wider existing leisure offer of the city centre in terms of cultural facilities and its existing retail, service and financial offer, supporting the future growth of the leisure facilities in the city centre will be a key part of securing its vitality and viability. Both of the new venues within the city centre will not only create significant new job opportunities and help support the local economy but will also create new opportunities to enhance the leisure offer, including both the food and beverage and hotel offer.

10.27 Co-op Live is in walking distance of the city centre for some patrons and it will drive footfall across the eastern part of the centre. This includes areas like Ancoats, Mayfield, Holt Town, Piccadilly, and Piccadilly East. Whilst some of these neighbourhoods are established food and beverage destinations, others (such as Piccadilly East and Mayfield) have significant scope for future development. Given the scale of additional residential development that is planned for these areas, it will be important that additional leisure floorspace is complementary to wider regeneration objectives.

10.28 However, significant opportunities exist around the eastern part of the city centre. This includes London Road Fire Station which is being redeveloped by Allied London as a hotel, workspace, and leisure venue. The industrial character of this part of the city centre already supports large format leisure destinations (including the Diecast and Freight Island food halls, and numerous ‘brewery tap’ operations), and there are likely to be further opportunities to support both neighbourhood bars, restaurants, and larger format leisure uses.

10.29 Aviva Studios also has the potential to act to drive footfall across the opposite western part of the city centre. This may provide opportunities for additional leisure uses on Deansgate, Liverpool Road, Quay Street, and as part of the new St John’s development. The scale and adaptability of Aviva Studios means that it has the ability to attract significant activity to the western part of the city centre throughout the week. In addition to supporting new uses, a cultural attractor in this location may also provide the opportunity to support a different type of operator and provide additional choice in leisure provision around St Johns, Deansgate and Castlefield.

10.30 It is also anticipated that residential development on the southern edge of the city centre (in particular, around the Mancunian Way and Chester Road) brings with it further opportunities for improved retail and leisure provision.

10.31 The population of this part of the city centre has grown considerably in recent years as a consequence of high-rise development in and around the southern gateway. Whilst some retail and service development has been delivered at ground floor within residential developments, it is still considered that this additional population has the potential to support further leisure provision. This may include further bars, cafés and restaurants.

10.32 All of the above supports the ongoing development and diversification of the leisure offer of the city centre and other centres across the authority area. Ensuring that the leisure offer works positively alongside the wider retail, service and financial offer of centres will be key to ensuring residents still have good access to day-to-day amenities, but there is scope to support additional leisure uses, particularly in association with the key growth areas set out above.

10.33 Accordingly, in terms of the identified quantitative need for additional café, restaurant, and licensed premises floorspace, it is considered that such development has the potential to:

- come forward in association with large-scale leisure attractors, which have the potential to expand the city centre evening economy in terms of its geography and overall offer;

- diversify parts of the city centre which have traditionally been somewhat homogenous in terms of the character and appeal (in particular, there may be the potential for a more varied food and beverage offer on Deansgate and within Castlefield and St John's); and
- support both additional large-scale leisure formats (which can sometimes repurpose former industrial premises, generally now found to the east of the city centre) and neighbourhood scale bars and restaurants in association with new residential developments.

Key Findings: Principal Centres

10.34 The Study has reviewed the vitality and viability of defined town and local service centres across the two authority areas. Our assessments have been undertaken with reference to the town centre healthcheck indicators set out at paragraph 006 of the Town Centres PPG.

10.35 Some broad conclusions that can be drawn from the findings set out at Section 5 include the following:

- Most of Manchester's district centres are performing reasonably well or well in relation to the selected healthcheck indicators. The centre of most concern is Wythenshawe, followed by Fallowfield, Gorton, and Harpurhey.
- With the exceptions of the city centre, Harpurhey, and Wythenshawe, vacancy rates across the district centres are generally low.
- A number of Manchester's centres perform relatively poorly in terms of environmental quality, with Fallowfield and Gorton identified as having the potential to deliver an improved public realm. However, it is recognised that the character of some centres is impacted by their location on an arterial route and a focus on day-to-day retail which is often characterised by low margins.
- A number of district centres benefit from healthy evening/night-time economies, particularly the South Manchester centres of Chorlton, Didsbury, Fallowfield, Rusholme and Withington.

10.36 In addition to the above key findings, we also note that:

- The mean vacancy rates for Manchester's district centres are below the UK average, with only Wythenshawe and Harpurhey having vacancy rates that exceed the national average. Four centres (Baguley, Fallowfield, Eastlands and Openshaw) have floorspace vacancy rates of 2.0% or less, meaning that they perform exceptionally well even for Manchester.
- Manchester's district centres as a whole have a lower proportion of comparison floorspace and units than a typical centre in the UK, but Baguley has significantly more than average and Fallowfield has significantly less.
- The district centres tend to be convenience-led, with this use having much more representation in Manchester than in the rest of the UK. Notable exceptions are Chorlton and Didsbury, where leisure uses make up a greater than average share of the centres' floorspace and units.
- Manchester's district centres collectively have a lower proportion of leisure floorspace than average, but a larger proportion of leisure units. This finding suggests that most of these premises are small in scale and the centres contain few large-floorplate leisure uses such as cinemas, bingo halls and swimming baths. Rusholme has the highest percentages of leisure space and units.
- Centres with a good balance and diversity of uses include Newton Heath and Didsbury.

10.37 In terms of Wythenshawe in particular, which is mentioned on a number of occasions in respect of the key findings set out above, the Council published the Wythenshawe Town Centre Development Framework in 2022. The Development Framework identifies the current weaknesses of the centre but also provides for achievable opportunities which will considerably enhance its vitality and viability.

10.38 Such improvements include diversification of uses, particularly in the leisure sector, improving permeability and accessibility, and also encouraging additional residential and commercial uses into the centre on the key development sites. Realising the interventions set out within the Framework will help to secure the future of the district centre and ensure that it fully meets the needs of its local community. As a consequence, we conclude that Wythenshawe is currently undergoing a transformation which offers substantial opportunity for the revitalisation of the centre's overall health.

Planning Policy Recommendations

General Policy Approach

10.39 The adopted Manchester development plan promotes a 'town centre first' policy approach which is broadly consistent with the general requirements of paragraphs 90 to 95 of the NPPF).

10.40 The Study identifies that the proportion of vacant floorspace in some centres is either in excess of, or approaching, the national average, and that there is a clear need to direct additional main town centre uses to these centres in particular. Whilst the majority of these centres are considered to be reasonably healthy, there will be a clear benefit in reducing the level of vacancies to improve centres' offer and visual attractiveness, and to support additional activity. Accordingly, it will be important to accommodate additional development within centres (or, failing that, in sustainable locations which are able to support linked trips to defined town centres).

10.41 In this regard, we note that paragraph 018 of the Town Centres PPG indicates that proposals for edge and out of centre retail and leisure developments should be considered with reference to the health of centres that would be impacted by development. Paragraph 018 states that:

'A judgement as to whether the likely adverse impacts are significant can only be reached in light of local circumstances. For example, in areas where there are high levels of vacancy and limited retailer demand, even very modest trade diversion from a new development may lead to a significant adverse impact.'

10.42 In this context, it will be important for the emerging plan to clearly set out the importance of the sequential and impact tests and explain the local circumstances which frame how they will be applied in practice. The sequential and impact tests will need to be applied in a robust manner in order to provide for the re-use of vacant units and to support centres which retain a strong retail function as well as a diverse range of other uses. Whilst non-retail uses will be an important component of the mix of land uses in principal centres moving forward, there is still a requirement to accommodate new retailers and support retail floorspace within defined centres wherever possible in accordance with the requirements of the NPPF.

10.43 It will be important for the forthcoming plan to clearly identify that the larger defined centres should continue to be the focus for comparison goods retail and that such uses remain important in driving footfall.

10.44 Notwithstanding this, it is evident that fundamental changes in the retail sector – largely resulting from the shift to online retail, which has been accelerated by the Covid-19 pandemic – have had a permanent impact on land use on the high street. As such it is critical that defined centres continue to diversify in order to provide (where possible) access to jobs, leisure, culture, services, open space and social connection.

10.45 In the context of the current vacancy rate and national planning policy requirements, we recommend that emerging plan policies are sufficiently flexible so as to allow for an appropriate range of town centre uses beyond retail, and reflect the need to repurpose historic, sometimes outdated retail stock in order to accommodate new residential, leisure and community uses. To this end, we note that paragraph 90 of the NPPF states that planning policies should:

'…recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.'

10.46 In this context, it is helpful to note recent redevelopment plans for some units in the city centre, such as the former Debenhams and House of Fraser units, along with the wider plans to rejuvenate Piccadilly Gardens and improve pedestrian and cycle movement throughout the City Centre, which should improve the health of the centre in time. Furthermore, Wythenshawe's detailed Development Framework also sets out clear plans to help secure the future health of the district centre.

10.47 We believe that it is important for the forthcoming plan to clearly identify that the city centre should continue to be the focus for comparison goods retail and that there is a need to direct such operators towards the centre in order for it to remain relevant and appropriately serve residents' needs.

10.48 On this basis, it will be important for the emerging plan to clearly set out the importance of the sequential and impact tests and explain the local circumstances which frame how they will be applied in practice. The sequential and impact tests will need to be applied in a robust manner so as to reduce the vacancy rate across the City Centre (and in other defined centres) and support centres that are fit for purpose going forward. Whilst non-retail uses will be an important component of the mix of land uses in principal centres moving forward, there is still a requirement to accommodate new retailers within defined centres wherever possible.

10.49 The local plan review should also consider the effects of the expanded Use Class E, and the unintended consequences of providing additional flexibility across Class E outside of town centres. Therefore, the Council may wish to consider applying restrictive conditions to certain forms of development in order to limit the authorised use to that which has been justified in the application submission. This will help ensure that unacceptable impacts do not arise from future Class E development.

Boundaries

10.50 Paragraph 90 of the NPPF requires local plans to **'define the extent of town centres and primary shopping areas'.**

10.51 There is no longer a specific requirement to identify primary and secondary frontages. The Government has confirmed that the removal of the requirement to define primary and secondary frontages reflects the general need to be flexible in planning for the future of town centres due to the rapid changes taking place in the retail and leisure industries. Whilst the removal of the requirement does not preclude local planning authorities from identifying primary and secondary shopping frontages where supported by local circumstances, we do not believe that this is merited in this instance. There is a clear need to repurpose and reoccupy centres across both authority areas in the manner that Use Class E generally provides for. In this context, the separate designation of both primary and secondary frontages would serve no useful purpose. Instead, we recommend a single defined 'primary shopping area'.

10.52 Annex 2 of the NPPF indicates that a primary shopping area is the **'Defined area where retail development is concentrated'**.

10.53 Annex 2 also identifies that a town centre is the:

'Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to

city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in the development plan, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.'

10.54 Annex 2 further defines main town centres uses as:

'Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).'

10.55 In this context, it is important to note that, although there is the opportunity to define separate primary shopping area and town centre boundaries, there is no general requirement to do so unless the specific characteristics of the subject centre support such an approach. Government policy specifically encourages the diversification of centres. Whilst retail will (in most cases) be a key element of a town centre, the majority of lower-order centres are diverse, and uses are typically distributed throughout the centre. Such centres may not have a particular concentration of retail uses at their core.

10.56 Furthermore, it is also important to recognise the purpose of defining both a primary shopping area and town centre boundary. In planning policy terms, distinguishing between the primary shopping area and town centre boundary is of principal merit in terms of identifying the area of relevance in applying the sequential and impact tests to retail development. The particular relevance of the primary shopping area to retail planning proposals is confirmed by Annex 2 of the NPPF.

10.57 In this context, we have reviewed the current boundaries of the defined town and district centres and provide our commentary on a centre-by-centre basis below. The recommended boundaries on the plans are provided at Appendix 8. We do not recommend defining both primary shopping areas and town centre boundaries within the district centres. The only exception to this is the City Centre, which we provide also at Appendix 8.

10.58 The existing position relates to that set out by the authority's adopted Policies Map.

Table 9.3: Summary of Boundary Recommendations for Town and District Centres

Centre	Recommendations
Baguley	Suggested boundary is tightly focused on the predominantly large format commercial operators identified in Baguley, either side of Altrincham Road.
Cheetham Hill	Our recommended boundary amendment includes the retail parade between St Mark's Lane and George Street North, and the regularisation of the district centre boundary around the Tesco superstore car park.
Chorlton	We recommend a suggested boundary amendment for Chorlton focused on the eastern boundary of the district centre, to include the petrol filling station on Wilbraham Road. Remainder of the boundary to be left as existing.
Didsbury	We recommend boundary amendments in Didsbury to include the addition of retail units fronting Barlow Moor Road between Grenfell Road and Churchwood Road, and the Aldi foodstore (and associated car park) on Wilmslow Road. We recommend that the remainder of the boundary is to be left as existing.
Eastlands	We recommend a boundary amendment to include the retail parade on the southern side of Ashton New Road, between the tram line and 586B Ashton New Road (currently occupied by Betfred).

Centre	Recommendations
	We recommend that the remainder of the boundary is to be left as existing.
Fallowfield	Our recommended boundary amendment for Fallowfield is to include McDonalds (and associated car park) on Wilmslow Road, and to remove non-main town centre uses on Ladybarn Road, including Fallowfield Timber. We recommend that the remainder of the boundary is to be left as existing.
Gorton	Our suggested boundary amendment in Gorton includes the removal of dwellings along Hyde Road. We recommend that the remainder of the boundary is to be left as existing.
Harpurhey	We recommend a boundary amendment In Harpurhey to include the removal of dwellings on Rochdale Road, at junction with Bankfield Street. We recommend that the remainder of the boundary is to be left as existing.
Hulme	Our suggested district centre boundary within Hulme is focused on Hulme High Street, between Greenheys Lane West and Moss Lane East, the Leisure Centre and Asda superstore and other operators at Hulme Retail Park. Non-main town centre operators are proposed to be excluded, such as offices at the junction of Moss Lane East and Hulme High Street.
Levenshulme	Nexus' suggested boundary amendments within Levenshulme include the removal of a number of dwellinghouses and other similar non-main town centre uses from the district centre. This includes more tightly defining the boundary along Stockport Road in the south of Levenshulme, the removal of Pascal Street and York Street, and dwellings along Barlow Road and Balleratt Street. We recommend that the remainder of the boundary to be left as existing.
Longsight	No boundary amendments suggested within Longsight.
Newton Heath	Within Newton Heath, we recommend boundary amendments include the removal of dwellings on Scotland Street, regularisation of boundary on Droylsden Road having regard to new residential schemes, dwellings between Smallwood Street and Droylsden Road, non-main town centre uses (such as Martins Craft Bakery) and dwellings on Oldham Road. Other changes include the regularisation of the boundary around the McDonald's on Oldham Road.
Northenden	Our recommended boundary amendments within Northenden are to include the petrol filling station on Palantine Road. We recommend that the remainder of the boundary is to be left as existing.
Openshaw	Nexus' suggested boundary amendments in Openshaw include Lime Square shopping centre (and associated car park), as well as removal of non-main town centre uses in the far-east of the district centre on Ashton Old Road (at the junction with Trevor Street), and the regularisation of the district centre boundary around Florence House Medical Practice.
Rusholme	No boundary amendments suggested within Rusholme, with the district centre boundary to remain as currently adopted.

Centre	Recommendations
Withington	Within Withington, we recommend a boundary amendment to largely relate to regularisation of defined district centre boundary, such as setting the south-western boundary of the district centre on Hill Street, to include the Gledhill Street car park and retail units on Davenport Avenue.
Wythenshawe	Within Wythenshawe, we recommend boundary amendments include the removal of non-main town centre uses to the east of Rowlandsway, except for the former bingo site, which will be coming forward for the delivery of additional retail floorspace in the future.

Article 4 Directions and Implications

10.59 It is also worth noting the ability to impose Article 4 directions to remove permitted development rights across town centres in particular circumstances.

10.60 Article 4 directions give power to local authorities to withdraw a specified permitted development right within a specified area. Paragraph 53 of the NPPF sets out how Article 4 directions should be used as a means of removing permitted development rights, and states that:

- in respect of changes from non-residential use to residential uses, they should be limited to situations where an Article 4 direction is necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability, but would be very unlikely to extend to the whole of a town centre); and
- in all cases, be based on robust evidence and apply to the smallest geographical area possible.

10.61 The appropriate use of Article 4 directions is further clarified by paragraph 38 of the When is Permission Required? Planning Practice Guidance, which states that:

‘Article 4 directions should be applied in a measured and targeted way. They should be based on robust evidence and apply to the smallest geographical area possible.’

10.62 Suitable circumstances for the use of Article 4 directions include the protection of town centres, as confirmed by paragraph 53 of the Secretary of State’s Written Ministerial Statement of July 2021. It is clear that an Article 4 direction could be applied to a town centre where it would demonstrably support the ongoing vitality and viability of the centre through the retention of commercial uses in central locations.

10.63 Whilst the NPPF refers to the application of Article 4 directions to primary shopping areas, the use of such directions is not predicated on there being a primary shopping area designation. The Ministerial Statement confirms that Article 4 directions can cover any geographical area (albeit it is not expected that such areas will be broad or relate to an entire local authority area).

10.64 We are unaware of any substantial reduction in the commercial offer of any principal centre through the use of permitted development rights. It is also important to recognise that some centres have a vacancy rate which equates to more than 10% of the commercial stock of units and that it will be important to re-use commercial premises for other uses where they are in danger of lying vacant for a significant period. However, residential values in some areas of Manchester are generally strong. In areas such as Didsbury and Chorlton, the residential market is particularly buoyant.

10.65 In this context, we recommend that the Council monitors the use of permitted development rights to secure changes of use from non-residential to residential uses. It will be important that the retail and commercial function of centres is not eroded, and that ground floor uses generally remain in active use and are accessible to the public.

Hierarchy

10.66 Paragraph 90 of the NPPF identifies that local planning authorities should define a network and hierarchy of town centres. However, very little detail is provided in this regard and, notably, neither the NPPF nor the Town Centres PPG differentiates between different types of town centre and the role each serves.

10.67 The most recent definitions provided by the Government were provided by Planning Policy Statement 4: Planning for Sustainable Economic Growth ('PPS4'), which was published in December 2009 (and was superseded by publication of the original iteration of the NPPF in March 2012). Whilst PPS4 should be considered on this basis (i.e., it is not up to date practice guidance), in the absence of any other definitions, it is of some relevance to the consideration of a retail centres hierarchy.

10.68 Annex B of PPS4 identified that:

'City centres are the highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions. Planning for the future of such areas can be achieved successfully through the use of area action plans, with masterplans or development briefs for particular sites. In London the 'international' and 'metropolitan' centres identified in the Mayor's Spatial Development Strategy typically perform the role of city centres.

Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. In London the 'major' and many of the 'district' centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.

District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.

Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.

Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement.'

10.69 Having visited the 17 district centres identified at Policy C1 of the Core Strategy, and the City Centre, we are satisfied that each of these continues to perform a role and function commensurate with their position in the retail hierarchy and do not recommend any changes in respect of these centres' positions.

Thresholds

10.70 Paragraph 94 of the NPPF indicates that it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail and leisure development which should be the subject of impact assessment. Any such threshold policy applies to the impact test only (all planning applications for main town centre uses which are not in an existing centre and not in accordance with an up-to-date development plan should be the subject of the sequential test[33]).

10.71 The purpose of applying an impact threshold within the development plan which deviates from the national threshold of 2,500 sq.m is to allow the Council to retain appropriate control in respect of the potential for development to impact on the future health of defined centres within the authority area. By applying a lower threshold, applications for developments which could potentially have a harmful effect on the overall vitality and viability of a defined centre, will need to be supported by a proportionate impact assessment which sets out the potential trade diversion impact assumptions.

10.72 Paragraph 15 of the Town Centres PPG provides specific guidance in relation to floorspace thresholds and states:

'The impact test only applies to proposals exceeding 2,500 square metres gross of floorspace unless a different locally appropriate threshold is set by the local planning authority. In setting a locally appropriate threshold it will be important to consider the:

- **scale of proposals relative to town centres**
- **the existing viability and vitality of town centres**
- **cumulative effects of recent developments**
- **whether local town centres are vulnerable**
- **likely effects of development on any town centre strategy**
- **impact on any other planned investment.'**

10.73 Using the above guidance, we set out the justification to support our view that a lower threshold should be applied across the hierarchy of centres within the authority area. To note, paragraph 10.56 of the Manchester Core Strategy states that the Council considers development of less than 650 sq.m gross will generally be of local significance only, and proposals over the threshold would need to be accompanied by an impact assessment proportionate to the scale and nature of the proposal.

10.74 In considering the setting of a local impact threshold, it is important to give consideration to the type of development (relating to convenience and comparison goods retail uses, and leisure uses) which would, in practice, provide space for key operators who could act to 'anchor' a centre. Should one of these anchor units or operators leave a centre, there will likely be the potential for a significant adverse impact to arise.

10.75 As such, where there is genuine potential for an application proposal to divert a material level of expenditure away from a defined centre, or potentially remove a key tenant from that centre, there will likely be a requirement to consider the impacts arising from the proposal in detail.

10.76 In respect of lower order centres, the introduction of even a small convenience store nearby (of the type operated by Sainsbury's Local or Tesco Express) may have the potential to impact on the ongoing viability of key operators. Small convenience stores operated by national multiple grocers can generate a relatively substantial turnover. If this is diverted from existing retailers in defined centres, the impact on the overall vitality and viability through the loss of spend and footfall, could be of a significant adverse magnitude.

10.77 Therefore, in implementing a local threshold policy, it is considered more appropriate to apply a range of thresholds in accordance with the type of centre the proposed development is proximate to. The thresholds

[33] With the exception (in accordance with paragraph 89 of the NPPF) of small-scale rural office proposals and other small scale rural development.

should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate or trade in practice.

10.78 We note that there are a relatively limited number of units greater than 750 sq.m in the City Centre, with less than 10% of the total stock of commercial units in the town having a greater floorspace than 750 sq.m. This includes a number of larger format leisure units, as well as retail units which accommodate national retailers. In terms of policy recommendations relating to the impact policy threshold, this relates to the defined centre, which for the purposes of retail development comprises the primary shopping area, and for all other main town centre uses comprises the city centre boundary.

10.79 In this context, our initial recommendation is that the impact threshold of relevance to Manchester City Centre is set at 750 sq.m for both retail and leisure proposals. This threshold would effectively be the default to be applied authority wide.

10.80 The above recommendation is also reflective of the City Centre vacancy rates and the potential for out of centre retail developments to become even stronger in the future at the expense of centres' vitality and viability. The existing out of centre commercial destinations all offers a range of comparison goods, which traditionally would have been sold from town centres. As such, the recommendation is reflective of the need to safeguard against the out of centre retail destinations becoming even stronger at the expense of the health of defined centres.

10.81 The district centres are generally anchored by one or two national multiple convenience stores. These operators underpin the function of these centres, drawing in custom and encouraging linked trips to the other parts of the centre. Should the viability of such stores be impacted, there is a real risk of the role of the wider centre being undermined. There are relatively few units substantially larger than 300 sq.m in any of the district centres and the level of retail floorspace is considerably less than within the city centre. As such, to lose an occupier of this magnitude could have a significant adverse impact on the centre as a whole. Accordingly, in the local context, 300 sq.m constitutes a significant unit for the district centres.

10.82 The above recommendation is also reflective of the district centre vacancy rates and the potential for out of centre retail developments to become even stronger in the future at the expense of centres' vitality and viability. The existing out of centre commercial destinations all offers a range of comparison goods, which traditionally would have been sold from centres. In terms of policy recommendations relating to the impact policy threshold, this relates to the defined centre, which for the purposes of retail development comprises the primary shopping area (where applicable), and for all other main town centre uses comprises the town centre boundary.

10.83 Local centres in the authority area are generally anchored by a limited number of national multiple retailers (often small convenience goods stores). In most cases, these operators underpin the function of these centres, drawing in custom and encouraging linked trips to the other parts of the centre. Should the viability of such stores be impacted, there is a real risk of the role of the wider centre being undermined. There are relatively few units substantially larger than 300 sq.m in any of these centres. As such, to lose an occupier of this magnitude could have a significant adverse impact on the centre as a whole. Accordingly, in the local context we believe that 300 sq.m also constitutes a significant unit in the local centres.

10.84 We believe that the proposed lower thresholds for district and local centres in the hierarchy is appropriate as a consequence of their localised role and function, and the fact that the opening of a small format convenience store outside of these smaller centres is likely to directly compete with type of local needs provision typically found within such centres. We therefore believe it is reasonable for applicants proposing developments of 300 sq.m gross floorspace for district centres and below, to demonstrate that their proposal will not have a significant adverse impact on smaller centres sharing part of the same catchment.

10.85 For the purpose of drafting future planning policy, it is important to qualify the area to which each local impact threshold will apply. We recommend that the lower impact threshold of 300 sq.m would be applicable within 800 metres of the boundary of the relevant centre. The distance of 800 metres is broadly commensurate with the potential walk-in catchments of smaller centres and is identified by Guidelines for Providing for Journeys on Foot (The Institution of Highways & Transportation, 2000) as being the 'preferred maximum' acceptable walking distance to a centre. We consider it to be appropriate for the higher threshold of 750 sq.m to apply authority-wide (i.e., beyond 800 metres of these centres), due to the lesser likelihood of significant adverse impacts arising from retail and leisure development.

10.86 It is important to emphasise that, whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with planning officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

10.87 Based on the above, we are of the view that an impact assessment will be necessary to accompany proposals for retail and leisure uses (including those relating to mezzanine floorspace and the variation of restrictive conditions) which are not located within a defined centre where:

- the proposal provides a gross floorspace in excess of 750 sq.m gross; or
- the proposal is located within 800 metres of a district or local centre and is in excess of 300 sq.m gross.

In our experience, it will only generally be development of a scale greater than these thresholds which could lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 95 of the NPPF. The setting of a 'tiered' threshold is consistently accepted by Inspector's at Local Plan Examination and, in our view, acts to appropriately ensure that only those proposals which could genuinely result in an unacceptable impact are the subject of an impact assessment.

Appendix 1: Study Area

Appendix 2: Household Survey Results

Appendix 3: In-Street Survey Results

Appendix 4: In-Street Survey Locations

Appendix 5: Healthcheck Reports

Appendix 6: Retail Quantitative Capacity Assessment

Appendix 7: Leisure Quantitative Capacity Assessment

Appendix 8: Boundary Recommendations

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