

Fallowfield District Centre

Description

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.

In the daytime, the district centre is anchored by its large Sainsbury's store, which attracts trade from a wide catchment drawn from locations across South Manchester. The supermarket acts as a focal point for the centre, whose main shopping and leisure frontages comprise Wilmslow Road (running north to south) and Wilbraham Road (running west to east).

The proliferation of takeaways and other student-focussed food and drink operators, together with the unsuitability of the majority of Fallowfield's commercial stock for national multiple non-food operators, mean that its comparison offer is more limited. Nonetheless, the Sainsbury's store provides for a good range of non-food products to help meet the daily needs of the surrounding residents.

Table 1 Fallowfield District Centre Floorspace Composition

GOAD Category	Floorspace at 2023 (sq.m)	Floorspace at 2023 (%)	Floorspace UK Average at 2023 (%)
Comparison	515	2.3%	30.1%
Convenience	5,293	23.8%	15.5%
Financial	9,049	40.6%	6.6%
Leisure	6,589	29.6%	26.3%
Retail Service	535	2.4%	7.2%
Vacant	304	1.4%	13.8%
TOTAL	22,285	100.0%	100.0%

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of February 2023; UK Average from Experian Goad Report February 2023.

Table 2 Fallowfield District Centre Unit Composition

GOAD Category	Units at 2023	Units at 2023 (%)	Units UK Average at 2023 (%)
Comparison	2	2.8%	26.9%
Convenience	6	8.3%	9.3%
Financial	12	16.7%	8.7%
Leisure	43	59.7%	25.4%
Retail Service	6	8.3%	15.8%

Vacant	3	4.2%	13.8%
TOTAL	72	100.0%	100.0%

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of February 2023; UK Average from Experian Goad Report February 2023.

Uses

Fallowfield's mix of uses very much reflects the resident student population and the small size of the majority of its units. Leisure uses, particularly pubs/bars and takeaways, dominate the centre. While 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. This weakness is exacerbated by the small size of most of Fallowfield's units, 89% of which measure less than 300 sq.m gross, which means that much of its commercial stock is unsuitable for national multiple non-food stores.

The percentage of units in Fallowfield used for leisure purposes is only moderately above the national average. However, the proportion of leisure floorspace in Fallowfield 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, comprising seven bars and pubs, five cafes and sandwich bars, 10 restaurants, 20 takeaways, and a dessert shop.

Most of these operators are independent, although there is representation from a range of national multiples including Nando's, McDonalds, Subway, Starbucks, Costa, Dominos and Papa Johns. The offer is geared towards the surrounding population of young adults, with the centre serving as a hub for student activity in the evenings.

As might be expected, given the size and format of most of Fallowfield's commercial stock, there are no large floorplate leisure uses such as a leisure centre. However, nearby facilities, including the Armitage Sports Centre and Withington Baths, provide for sports/recreational uses within walking distance of the district centre.

Food retailing is another key strength of Fallowfield's provision, with the centre's proportion of convenience floorspace being well above the national average. The figures reflect the presence of the large Sainsbury's store (4,398 sq.m gross), which anchors the centre and dominates its retail offer. Sainsbury's serves the surrounding student accommodation and terraced housing, as well as attracting trade from visitors residing beyond the immediate catchment.

In terms of its percentage of convenience units, Fallowfield is moderately below the national average but still provides for a decent range of retailers catering primarily for the student population. In addition to Sainsbury's, there is a halal supermarket measuring 471 sq.m (Wimmy

Foods), a number of small convenience stores/off licences each measuring less than 200 sq.m (Midway Wines, New Zealand Wines, Kwik-E-Mart), and a vape shop.

On the other hand, the quanta of comparison retail floorspace and units are far below the relevant UK averages. The centre contains just two non-food stores (Savers and Wall 2 Wall carpets), both of which are fairly small in scale. As a consequence, Fallowfield lacks a number of non-food retail uses that would be expected to serve the daily needs of its local residents, including a chemist and any shops selling clothing or footwear, although the Sainsbury's store does sell a range of non-food products (including an Argos concession) that somewhat makes up for this gap in provision.

With regard to financial and business services, Experian/Goad records that Fallowfield is well in excess of UK averages in terms of both floorspace and units. However, the apparent overprovision is mainly due to the presence of two large building supplies operations on Ladybarn Road, to the rear of Sainsbury's. These storage/manufacturing/trade counter uses are not typical of a district centre, and we subsequently suggest that these sites might provide a suitable opportunity for redevelopment in the long-term.

Two thirds of the centre's financial and business services units are occupied by estate/letting agents, a consequence of the high numbers of students who seek residential accommodation in the area from their second academic year onwards. As with other sectors, there is a lack of diversity, with no representation from any banks, building societies, solicitors or other business services.

Similarly, Fallowfield has relatively few retail service businesses. Again, there is little variety in the offer, which comprises four barbers, a hairdresser and a tanning studio.

Daytime/Evening Economy

The anchor Sainsbury's store forms the focal point of the centre in the daytime, attracting footfall and trade from a wide catchment. The Sainsbury's store is supported by food and drink operators that open during the daytime, notably McDonalds and Subway.

Fallowfield also functions as an evening destination, focussed on eating and drinking establishments that predominantly serve the student market. Most of its bars and takeaways are open until the early hours of the morning, with the centre remaining busy until this time.

Vacancies

The vacancy rate in Fallowfield is well below the national average. Only 1.4% of the centre's floorspace is unoccupied, whereas the rate in a typical centre is 13.8%. There are only three vacancies, which translates to 4.2% units against a UK average of 13.8%.

All three of the identified vacant units are small in scale, ranging in size from 47 sq.m to 139 sq.m. Two of the three are next door to each other and located on the ground floor of a block of student accommodation known as Ladybarn House, on the corner of Moseley Road and Wilmslow Road.

While the location is fairly prominent, the units sit at the meeting point of four busy roads and are overlooked day and night by active street frontages. As a consequence of this and their small size, the negative impact on the feel and look of the centre is limited.

Opportunity Sites

As noted above, the vacancy rate in Fallowfield is low and its commercial units are mostly small in scale with limited scope for expansion. The district centre would benefit from development to accommodate comparison retailers, especially national multiples who tend to need larger floor areas. There are two potentially well-located opportunity sites in the form of the existing builders supply merchants on Ladybarn Road, but these are currently in active use and thus any redevelopment proposal could only feasibly come forward in the long term.

The only other potential large redevelopment site of which we are aware in Fallowfield is the Owens Park, Oak House and Woolton Hall site, which is currently used for student accommodation but which has capacity for approximately 950 additional bedrooms. In June 2023, the University of Manchester launched a consultation on its plans to redevelop the site for high-quality, modern student accommodation to meet growing demand. The purpose of the consultation was to seek feedback, prior to the submission of an outline application.

The forthcoming application proposal will be delivered in multiple phases and involve the demolition of the vacant Owens Park tower, which lies just outside the district centre's boundary and currently detracts from its environmental quality. The University's consultation website advises that an initial phase of enabling works will take place in summer 2023, resulting in the refurbishment of the existing Oak House accommodation and moving of the student reception area in time for the start of the academic year 2023/24.

The provision of additional and higher quality student accommodation will bring new footfall and trade to the district centre, helping to maintain its vitality and viability.

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.

Market Summary

With reference to CoStar data sourced in June 2023, the average annual market rent per sq.ft currently achieved in Fallowfield is £19.76. This is the fourth highest market rent achieved by Manchester's district centres, and represents a 4.6% increase on the £18.90 per sq.ft average achieved in the previous 12-month period. Notwithstanding this, Costar currently predicts market rents to remain fairly steady, increasing gradually to around £20.00 per sq.ft by 2027.

Additionally, the average market sale price per sq.ft has increased slightly over the past 12-month period, up 0.7% to £240 per sq.ft. This is the second highest market sale price achieved by a district centre in Manchester.

In respect of yields, CoStar find that the current market yield is 6.9%, with this figure falling very slightly from the market yield observed in the previous 12-month period of 7.0%. The market yield in Fallowfield is forecast to rise again, however, to circa 7.6% over the period to 2027.

Increases in rents and decreases in yields are generally considered positive signs in respect of investor confidence in a given location. In this instance, Fallowfield's yields are the third lowest recorded among the district centres in Manchester, suggesting a good level of investor confidence.

In respect of the probability of leasing vacant premises, 50% of premises can be anticipated to be leased after around 13.5 months on the market.

Pedestrian Flows

As might be expected, the Sainsbury's store in Fallowfield was the focus of most pedestrian activity on the day of our site visit. Nonetheless, Wilmslow Road was reasonably busy throughout, with numerous visitors arriving by bus and alighting near the Owens Park tower and Friendship Inn pub. The side streets, notably Ladybarn Road, were somewhat quieter, but overall the centre was well-used.

The location of Fallowfield along the busy Wilmslow and Wilbraham Roads brings significant 'upsides' in the form of the footfall and activity which support the successful aspects of the district centre. Nonetheless, a slight 'downside' of the high levels of through traffic was that pedestrian flows on the main shopping and leisure streets were at times inhibited due to difficulties in crossing the central roads on the day of our field visit. We observed that these difficulties were exacerbated by the guard rails present along certain parts of Wilmslow Road.

Accessibility

Fallowfield is located approximately 20 minutes' drive from the City Centre, and also has good road connections to the M60 orbital motorway.

There are regular and frequent bus services that run along Wilmslow Road and Wilbraham Road, linking the district centre to: Piccadilly Gardens, Ancoats, Higher Crumpsall, Middleton, Openshaw and Newton Heath to the north; East Didsbury, West Didsbury, Manchester Airport, Handforth Dean, Woodford and Stockport to the south; the Trafford Centre and Sale to the west; and Gorton and North Reddish to the east.

Dedicated cycle lanes are provided throughout the district centre, save for some of the quieter side streets, and there are numerous Sheffield stands dotted along Wilmslow Road.

However, while the busy traffic through the district centre brings important footfall and activity that help sustain it, associated congestion can sometimes create accessibility issues for those visiting the centre by cycle and on foot, especially at the junction of Wilmslow and Wilbraham Roads. On the day of our fieldwork visit, the situation was exacerbated by the illegal parking of cars in the footpaths and bike lanes on the south side of Wilbraham Road.

With regard to the accessibility of the centre for people with mobility issues, we observed that the pavements were mostly even, with tactile paving provided at the main pedestrian crossing points along Wilmslow Road. While there was some street clutter in the form of A-board signs, bins, and other impediments, the footpaths were generally wide enough to also accommodate wheelchairs, pushchairs, etc.

Perception of Safety

During the day, the good levels of footfall and natural surveillance makes Fallowfield feel generally safe and secure. As noted above, while the busy through traffic brings many upsides, the district centre can suffer at busy times from a build up of cars around key junctions, especially at Wilmslow Road/Wilbraham Road, which negatively impacts on perceptions of safety.

In the evenings, as with any busy late-night food and drink destination, Fallowfield can experience antisocial behaviour, noise and littering arising from a minority of users. The district centre does have street lighting and CCTV to promote safety at night, but would benefit from additional measures aimed at ensuring that all visitors behave in a way which is respectful to the local community.

Environmental Quality

Fallowfield contains some attractive individual buildings, such as the Grade II listed Church of the Holy Innocents and St James and the associated school (which is now occupied by the public house at 256 Wilmslow Road). There are also a number of mature trees, especially around Wilbraham Road, which add some welcome greenery.

In general, however, there is room for improvement to Fallowfield's public realm. A significant proportion of the centre's commercial stock comprises the ground floors of Victorian and Edwardian terraces with residential flats above, and these are often poorly maintained with little consistency in the signage. The large number of takeaways which solely open at night mean that there are numerous clusters of units which are shuttered during the day, and there is graffiti and litter present throughout the district centre.

In addition, as outlined above, while the advantage of the heavy car traffic throughout Fallowfield is that it contributes to the footfall and activity that help sustain the district centre, the disadvantage is that it detracts from the pedestrian environment and acts as a barrier for those seeking to cross roads, especially on the main retail and leisure thoroughfares.

Overall, Fallowfield as a whole would benefit from initiatives to encourage shopfront improvements and enhanced pedestrian connectivity.

Conclusions

Fallowfield district centre's strengths include its anchor Sainsbury's store and its bustling evening food and drink scene. As a consequence, the centre enjoys good levels of footfall day and night, and its vacancy rates are far below average.

On the other hand, the comparison and service offers are somewhat lacking in quantity and diversity, partly due to the small size of most of the commercial premises which makes them unsuitable for many national multiples. The relative underprovision inhibits Fallowfield's ability to meet the daily needs of local residents, although the Sainsbury's store does make up for some of the identified deficiencies.

Opportunities exist to improve the environmental quality of Fallowfield, including measures to enhance poorly maintained shopfronts and decrease the number of shutters which are kept down during the day. While it is important to recognise the role played by the central roads in supporting the successful aspects of the district centre, it would benefit from mitigation relating to the negative impacts of car traffic.

Fallowfield's success as an evening food and beverage destination is an important contributor to its vibrancy and identity. As with any busy late night leisure hub, however, antisocial behaviour from a minority of users can cause a negative impact on perceptions of safety. Streetlighting and CCTV throughout the district centre go some way towards reducing any perceived threat of crime arising from the takeaways and drinking establishments, but additional safety measures could benefit Fallowfield by ensuring that all visitors remain respectful of the local community.

Our main conclusion with regard to 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.



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Manchester Retail and Leisure Study

Survey Date - February 2023

Key

■ Comparison	■ Leisure Service
■ Convenience	■ Retail Service
■ Financial & Business Services	■ Vacant