

# Hulme District Centre

## Description

The current form and layout of Hulme district centre are the result of extensive redevelopment undertaken in the early 2000s in an effort to regenerate the area. 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, many of which have residential flats at the upper storeys. The western part of the district centre also contains a permanent Indoor Market hall, and an Outdoor Market that operates six days per week. The latter is made up of 13 container-style units arranged around a pedestrianised square.

In the eastern part of the district centre, Hulme Retail Park provides for national multiple retail and fast food operators that trade from large 'retail park' style units. The most important retailer is the large Asda superstore, which anchors the centre and underpins its role as a convenience shopping destination.

Table 1 Hulme District Centre Floorspace Composition

GOAD Category	Floorspace at 2023 (sq.m)	Floorspace at 2023 (%)	Floorspace UK Average at 2023 (%)
Comparison	2,051	11.6%	30.1%
Convenience	7,485	42.4%	15.5%
Financial	369	2.1%	6.6%
Leisure	4,808	27.3%	26.3%
Retail Service	1,565	8.9%	7.2%
Vacant	1,362	7.7%	13.8%
<b>TOTAL</b>	<b>17,640</b>	<b>100.0%</b>	<b>100.0%</b>

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 Hulme District Centre Unit Composition

GOAD Category	Units at 2023	Units at 2023 (%)	Units UK Average at 2023 (%)
Comparison	3	7.9%	26.9%
Convenience	8	21.1%	9.3%
Financial	3	7.9%	8.7%
Leisure	10	26.3%	25.4%
Retail Service	11	28.9%	15.8%
Vacant	3	7.9%	13.8%
<b>TOTAL</b>	<b>38</b>	<b>100.0%</b>	<b>100.0%</b>

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

Hulme's proportions of convenience floorspace and units are well in excess of the corresponding national averages. Unsurprisingly, the Asda superstore accounts for the majority (85%) of the floorspace in the centre used for food retailing. Asda 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. All of these non-multiple operators are located on Hulme High Street, with two being within the purpose-built Hulme Indoor Market hall that was constructed in the early 2000s.

Conversely, Hulme has considerably less comparison retail provision than a typical centre in the UK. Just three of the district centre's 38 commercial premises are non-food shops. This equates to less than a third of the national average in terms of proportion of units. The share of floorspace used for comparison purposes in the centre is also far below average.

The vast majority of the identified comparison floorspace (91%) comprises the large format B&M store at Hulme Retail Park. The two remaining non-food shops are independent mobile phone and sports equipment stores located on Hulme High Street, both measuring less than 100 sq.m. The Outdoor Market also makes a limited contribution to diversity in the comparison sector, with two of its shipping container units selling clothing and electronics, but these stalls are modest in scale and were not trading on the day of our site visit.

The centre's 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 underprovision 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.

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, a modern Council-run facility incorporating swimming pools, a gym and health suite, squash courts, sports hall, studio, library and meeting/conference suite.

The other leisure units in the centre, save for a bookmakers operated by Paddy Power, are all dedicated to food and drink uses. The only national multiple operator recorded by Experian Goad is the McDonalds fast food outlet which occupies part of the Asda store. There is also a large KFC drive-thru on the car park of Hulme Retail Park which is outside the Goad boundary but which nonetheless

functions as part of the district centre. The remaining provision comprises two cafés and five takeaways, all located on Hulme High Street, together with some small Outdoor Market stalls that were closed on the day of our visit. Overall, we consider Hulme's daytime leisure offer to be one of its strengths, underpinned by the excellent range of facilities provided by the leisure centre. The evening economy is more limited, as outlined below.

Financial and business services take up a low proportion of floorspace in Hulme compared to the UK average, but this is mainly due to the small size of units on Hulme High Street compared to the large national multiples on the retail park. In terms of units used by financial and business service operators, the proportion in the district centre is roughly in line with the national average. Hulme has representation from an estate agent, money exchange business, and a solicitor. The absence of any bank or building society in the centre is notable, although the Asda does provide free ATMs.

Hulme's proportion of floorspace dedicated to retail services is moderately above the national average. In terms of units, however, the difference is more pronounced, with Hulme's share of commercial premises in retail service use being much higher than a typical UK centre. All of these units are on Hulme High Street and run by independent operators. The provision is slightly lacking in diversity, largely comprising barbers, hairdressers and beauty operators, together with a single phone/computer repair shop.

## Daytime/Evening Economy

Hulme's daytime economy is anchored by the Asda superstore, which draws trade from Hulme's reasonably large residential catchment and also from locations further afield such as Fallowfield, Whalley Range and the City Centre. The Asda is supported by a range of small-scale specialist independent retailers located along Hulme High Street and in its markets, and the strong daytime leisure offer provided by the Moss Side Leisure Centre & Hulme High Street Library building.

The operators on Hulme Retail Park are open late into the evening. Asda and McDonalds close at 12am most nights, while KFC and B&M are usually open until 10pm and 9pm respectively. Moss Side Leisure Centre also closes late during the week, being open until 10pm on weeknights and 5pm on weekends. As a consequence, there is a limited amount of activity in the eastern part of the centre in the evenings, although noticeably less than in the daytime.

In contrast, most of the operators on Hulme High Street and in the market hall close by 7pm at the latest. The exception is the five takeaway units, most of which operate late into the night. However, these do not draw significant numbers of people into the centre in the evening and, as a consequence, the western part of Hulme is noticeably quieter 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.

## Vacancies

Hulme's vacancy rates are significantly below the national average with respect to both floorspace and units. Just 7.7% of the district centre's commercial floorspace is vacant, whereas the proportion in a typical UK centre is 13.8%. Similarly, only 7.9% of commercial premises (3 units) in Hulme are empty, compared to 13.8% of units nationwide.

Over 82% of the unoccupied floorspace recorded is accounted for by the former B&M Bargains store within the indoor Market Hall (measuring 1,121 sq.m gross), 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 (August 2023) and represents a key opportunity site in Hulme. Owing to its large size and its potential to act as an anchor to draw footfall and trade to Hulme's markets, the fact that this unit remains empty means that it has an unduly negative impact on the appearance and function of the district centre.

The other two vacancies recorded in the district centre on the day of our site visit are small in scale (measuring 163 sq.m and 78 sq.m) and located on either side of Hulme High Street. These units are surrounded by retail services uses which are active during the day, which reduces their adverse impact on the remainder of the commercial frontages.

## Opportunity Sites

While Hulme has few vacancies (with only three empty units recorded on the day of our visit), it will be important to repurpose or reoccupy these. In particular, the former B&M store in the Indoor Market hall is being actively marketed and the district centre would benefit substantially from its re-use for purposes that contribute to Hulme's vitality and viability.

Aside from these vacancies, there are few opportunities for medium-to-large-scale expansion or redevelopment in Hulme, given its history as a purpose-built modern retail centre and the existence of residential flats above its high street units.

## Market Summary

With reference to CoStar data sourced in June 2023, the average annual market rent per sq.ft currently achieved in Hulme is £15.51, with this figure representing a 7.8% increase on the £14.39 per sq.ft average achieved in the previous 12-month period. These rents are towards the lower end of what is achieved across all 17 of Manchester's district centres, with the average being £17.06 per sq.ft.

Additionally, the average market sale price per sq.ft has increased slightly over the past 12-month period, up 2.4% to £178 per sq.ft. Costar currently predicts market rents to remain fairly steady, increasing gradually to just above £15.50 per sq.ft in the period up to 2027.

In respect of yields, CoStar find that the current market yield is 6.9%, with this figure being slightly down from the 7.0% market yield observed in the previous 12-month period. The market yield in Hulme is forecast to rise 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, Hulme's yields are the third lowest recorded among the 17 district centres in Manchester, suggesting a good level of investor confidence.

CoStar does not currently hold any data relating to the probability of leasing vacant premises in Hulme.

## Pedestrian Flows

We observed a reasonably high level of pedestrian activity throughout the district centre during our visit. Given the key role played by the Asda superstore in anchoring Hulme, it is not surprising that the greatest concentration of pedestrian activity was around this facility. In addition, we noticed strong pedestrian flows towards Moss Side Leisure Centre on Hulme High Street. It is therefore clear that these facilities play a key role in driving activity into Hulme, and also support a number of linked trips throughout the district centre.

There was a strong flow of pedestrians between Hulme Retail Park and the units along Hulme High Street, suggesting that, whilst these two areas are somewhat geographically detached, they function at least in part as a single, cohesive centre.

Moreover, the district centre's close proximity to Manchester Metropolitan University (particularly the Birley Fields campus), the University of Manchester and Loreto College, make it a key destination for the student population. During our visit, a number of young people were observed visiting restaurants, hot food takeaways and cafés in Hulme.

## Accessibility

Hulme is easily accessible by car, being located off Princess Road (A5103), one of Manchester's principal radial routes running from the City Centre in north to Junction 3 of the M56 motorway in the south.

Public transport accessibility is also good, with bus stops on both sides of Greenheys Lane West in the north of the centre linking it to Manchester City Centre and Chorlton. Further stops on Princess Road and Moss Lane East a short walk from Hulme connect it with Wythenshawe and the airport in

the south and Flixton in the west. Deansgate and Oxford Road railway stations both lie approximately 2 km from the district centre.

The district centre benefits from good cycle infrastructure and linkages with the City Centre and surrounding areas. There are dedicated cycle lanes along most of Princess Road and the main commercial frontages, and Sheffield stands for bicycle parking are provided throughout the centre.

Pedestrian footpaths connect Hulme to a substantial walk-in catchment.

With regard to accessibility around the district centre, we note that Hulme High Street was made into a one-way street in summer 2020 as part of the social distancing measures implemented in response to the Covid-19 pandemic. This change has reduced the volume of traffic passing through Hulme, allowing for safer pedestrian movements and increasing the ease of access for cyclists. The decrease in traffic volumes has also improved the general perception of the centre as car-dominated.

In the rest of the district centre, the general standard of accessibility for visitors on foot is high, particularly the pedestrianised areas around Hulme Market. The generally flat topography and lack of clutter mean that the centre presents few barriers for those with mobility impairments.

The one slight exception is the busy car park around the Asda superstore and other large-floorplate units at Hulme Retail Park, where the volume of traffic gives rise to potential pedestrian/vehicle conflict. Nonetheless, the car park does benefit from traffic slowing measures such as zebra crossings and speed bumps and, on the day of our field visit, most pedestrians appeared to traverse without difficulty.

## Perception of Safety

At the time of our visit, Hulme felt largely safe and secure. While footfall was concentrated around the Retail Park, we observed moderate amounts of pedestrian activity throughout the district centre, reducing any perceived threat of crime. However, the proportion of closed roller shutters throughout the daytime does adversely impact on vibrancy and surveillance in some parts of the district centre, particularly along Hulme High Street.

Hulme's mostly linear and legible layout ensures a high level of both natural and passive surveillance. The district centre provides attractive pedestrianised areas which ensure a good standard of safety for people travelling on foot. Nevertheless, the proximity of vehicles to pedestrians in some parts of the centre, notably the Asda car park, did detract slightly from the overall feeling of safety.

As explained above, the operators at Hulme Retail Park and the Leisure Centre are open until late into the evening and thus the eastern half of the centre experiences a modest level of activity after daylight hours, albeit that it is substantially quieter than in the day.

In contrast, there is a lack of activity in Hulme High Street after around 7pm, which deters footfall and thus increases the perceived and real threat of crime in the western part of the centre. While the high street is fairly well lit and overlooked by residential units at its upper floors, we noticed some graffiti across the district centre on the day of our visit, suggesting that it would benefit from additional measures such as visible CCTV cameras in order to deter anti-social behaviour and reassure evening visitors.

## Environmental Quality

Hulme is modern district centre and, as a consequence, does not suffer from the problems of deteriorating buildings or disjointed public realm that negatively impact some of the other centres in Manchester. Its shopfronts are mostly well-maintained, although the quality of some of the signage is poor and the number of closed roller shutters during daytime opening hours did detract somewhat from the overall appearance.

Connectivity between the two 'halves' of Hulme is good, with the legibility of the district centre enhanced by its compact, largely linear nature and through the provision of signage.

Hulme High Street, which forms the more traditional 'retail heart' of the centre benefits from seasonal planters, street trees and the pedestrianised marketplace, all of which help to create a generally pleasant shopping environment in the western part of Hulme.

Hulme Retail Park and the Leisure Centre, in the eastern part, are also modern and well-kept, although the large surface car park that serves the former means that vehicle movements are concentrated in the area. The high level of traffic in this location also leaves few opportunities for pedestrian-focussed enhancements, such as street furniture, to alleviate the sense that the east of the district centre is somewhat car-dominated.

Notwithstanding this slight concern, our overall conclusion is that, on the whole, Hulme district centre benefits from a reasonably high standard of environmental quality that helps to underpin its vitality and viability.

## Conclusions

With just 38 commercial units, Hulme is one of Manchester's smallest district centres, although its Asda superstore results in its proportion of food retail floorspace being significantly above the national average. Asda anchors the centre and underpins its primary role as a convenience destination, supplemented by a range of independent foodstores located on Hulme High Street and in its marketplace.

The largest leisure unit is the Moss Side Leisure Centre & Hulme High Street Library, which provides for a strong offer incorporating swimming pools, a gym and health suite, squash courts, sports hall, studio, library and meeting/conference suite.

As a consequence of the district centre's role as a food retail and service destination, it attracts consistent footfall throughout the day and vacancy rates are low in terms of both floorspace and numbers of units.

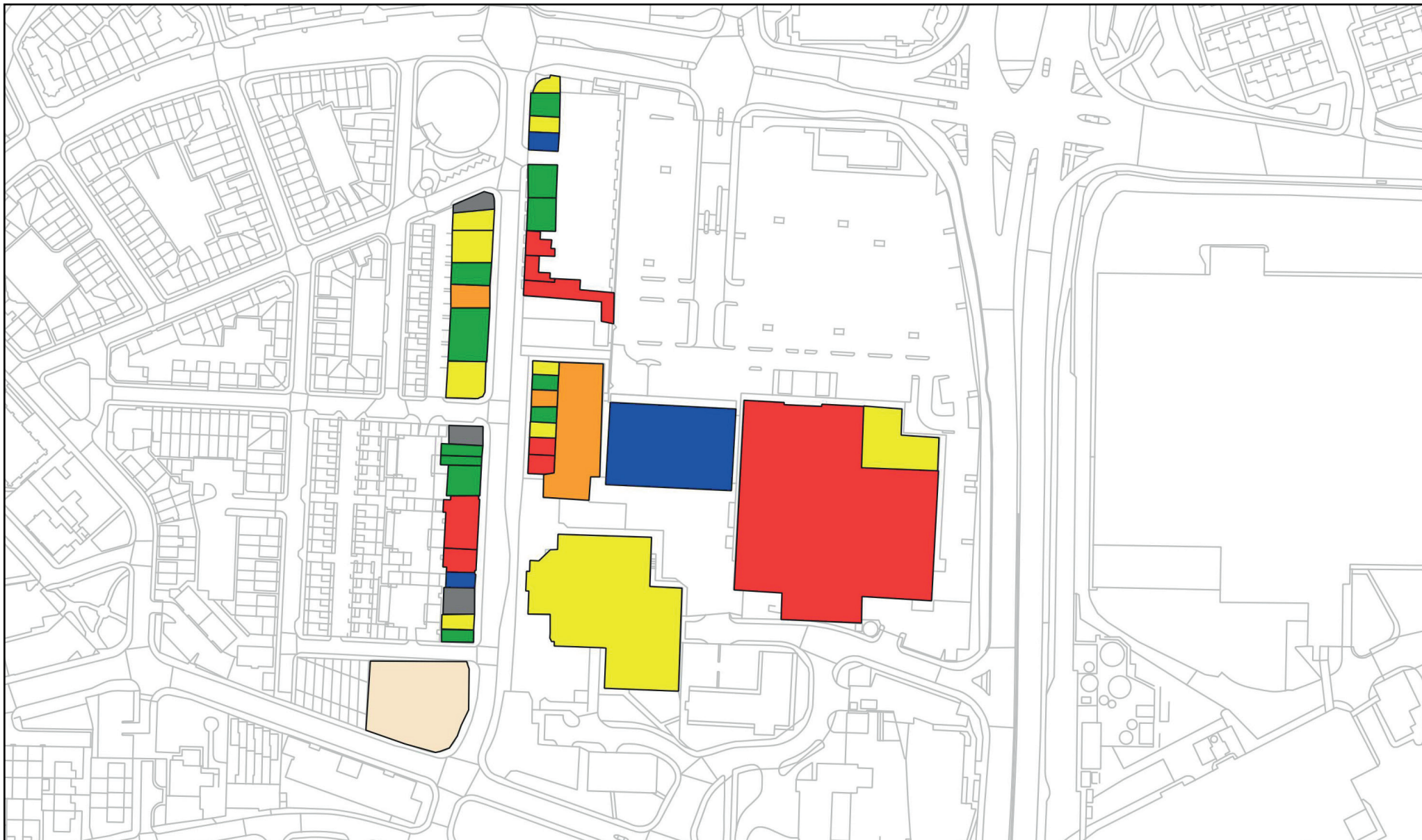
Conversely, comparison provision in Hulme is low compared to UK averages, with the non-food retail sector being limited to the B&M store, two small independent shops, and some Outdoor Market operators.

The district centre also lacks a substantial evening economy, and would benefit from the introduction of uses such as restaurants, particularly in Hulme High Street to help stimulate activity in the western part of the centre after daytime hours. The introduction of measures to deter crime and anti-social behaviour, such as visible CCTV cameras, would also help to increase perceptions of safety and encourage more people to visit Hulme in the evenings.

Due to its nature as a purpose-built, modern centre, Hulme's standards of environmental quality and accessibility for people with mobility issues are generally good. Notwithstanding, the busy car park at Hulme Retail Park attracts high volumes of vehicle movements, which cause some issues relating to noise and air pollution and may result in difficulties for visitors seeking to traverse this part of the centre on foot.

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





## Hulme district centre

### Manchester Retail and Leisure Study

Survey Date - February 2023

#### Key

 Comparison	 Leisure Service
 Convenience	 Retail Service
 Financial & Business Services	 Vacant