

Eastlands District Centre

Description

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 Sportcity). 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.

The district centre itself 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. Eastlands benefits from excellent public transport infrastructure, including the adjacent Metrolink stop, and is generally well-maintained.

Vacancy rates in Eastlands are exceptionally low, and the centre enjoys representation from a range of national multiples including Decathlon.

Table 1 Eastlands District Centre Floorspace Composition

GOAD Category	Floorspace at 2023 (sq.m)	Floorspace at 2023 (%)	Floorspace UK Average at 2023 (%)
Comparison	3,607	18.8%	30.1%
Convenience	11,851	61.7%	15.5%
Financial	0	0.0%	6.6%
Leisure	3,031	15.8%	26.3%
Retail Service	397	2.1%	7.2%
Vacant	313	1.6%	13.8%
TOTAL	19,199	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 Eastlands District Centre Unit Composition

GOAD Category	Units at 2023	Units at 2023 (%)	Units UK Average at 2023 (%)
Comparison	2	11.8%	26.9%
Convenience	3	17.6%	9.3%
Financial	0	0.0%	8.7%
Leisure	9	52.9%	25.4%
Retail Service	2	11.8%	15.8%
Vacant	1	5.9%	13.8%
TOTAL	17	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

Eastlands is the second smallest of Manchester's district centres in terms of units, having just 17 commercial premises within its boundary. However, it is only sixth smallest in terms of floorspace, primarily due to the presence of the Asda superstore (11,677 sq.m) and other large footprint operators in the western part of the centre.

Eastlands' proportion of convenience floorspace is almost four times the national average. The Asda store accounts for almost all of this floorspace (98.5%), with the other food retailers being a small convenience store and bakery in the east of the centre. The proportion of units in convenience use is also higher than the national average, albeit to a much lesser extent and largely due to the small overall number of commercial premises. It is clear that Asda acts as an important anchor for the district centre, offering a comprehensive range of convenience goods which is complemented by the smaller independent 'high street style' operators.

Only two of the commercial units in Eastlands are used for non-food retailing, equating to less than half the UK average. Similarly, Eastlands' proportion of comparison floorspace is lower than the average. 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.

Although Eastland's proportion of leisure units is more than double the national average, the district centre actually contains a lower proportion of leisure floorspace than a typical UK centre. Five of the nine recorded leisure units 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 McDonalds) 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.

There are no banks, building societies, estate agents, solicitors or similar operators in Eastlands. However, the Asda superstore fulfils some of the day-to-day financial services needs of local residents, offering cash withdrawals, money transfers and a bureau du change.

The district centre's retail services offer is below the national average both in terms of the proportion of floorspace used by such operators and the number of units. The centre's two retail service traders comprise the Asda petrol station and a small independent barber. Eastlands therefore lacks some of the service uses provided by more typical district centres (such as hairdressers/beauty salons or a post office), reflecting its convenience retail and leisure focus. Notably, the Asda store incorporates an opticians and Timpson concession which help to fulfil some of the retail service needs of local residents.

Daytime/Evening Economy

During the day, the district centre fulfils the retail needs of local residents and visitors attracted by the nearby sporting events/facilities. Asda acts as the key anchor, supported by the leisure uses with daytime opening hours (primarily in the west of the centre). The east of the centre provides for some small-scale independent operators that open in the day, including the convenience store, bakery, barber and a small electronics shop.

The opening hours of the mainly national multiple operators in the west of the district centre also extend late into the evening, with the Asda being open 24 hours for most of the week and with McDonalds and Starbucks closing most days at 12am and 10.30pm respectively. To the east, there is concentration of independent takeaway operators that are open in the evenings, meaning that there is an active shopping frontage in this part of Eastlands until the early hours of the morning.

Vacancies

Eastlands district centre enjoys a very low vacancy rate equating to just 1.6% of floorspace and 5.9% of units, far below the national average of 13.8% for both floorspace and units.

Only one vacant unit was recorded in Eastlands district centre on the day of our site visit, this being the former Natwest at the corner of Ashton New Road and Bank Street. This is a long-term vacancy dating back to at least 2008. Its prominent location and relatively large size (compared to the other units in the east of the centre) of 313 sq.m mean that the vacancy has an unduly negative effect the quality of Eastlands' environment. It also contributes to the feeling of separation between the east and west of the district centre, as it is located between these two areas and increases the length of inactive frontage between them.

Opportunity Sites

While the wider East Manchester area is subject to significant ongoing regeneration (with the most recent strategic framework being published in 2019), there are few opportunity sites within the district centre itself.

The only vacancy is the former NatWest bank which, although it would clearly benefit from reoccupation or redevelopment, is not being actively marketed.

There is also an area of largely cleared land in the middle of the district centre to the north of the tram tracks. It appears that this land is currently being used for storage in association with the

National Cycling Centre, and it is not being actively marketed, but it has the potential to be used for 'infill' development to enhance the vitality and viability of the district centre.

Market Summary

With reference to CoStar data sourced in June 2023, the average annual market rent per sq.ft currently achieved in Eastlands is £8.66, with this figure representing a 6.9% increase on the £8.11 per sq.ft average achieved in the previous 12-month period. This is the lowest market rent achieved by any of Manchester's 17 district centres.

The average market sale price per sq.ft has increased slightly over the past 12-month period, up 1.8% to £131 per sq.ft. However, CoStar forecasts that market sale prices will fall in future, reaching circa £120 per sq.ft by 2027. Moreover, the current prices are the lowest achieved among the district centres.

In respect of yields, CoStar find that the current market yield is 7.4%, with this figure falling very slightly, by 0.1%, from the market yield of 7.5% observed in the previous 12-month period.

Increases in rents and decreases in yields are generally considered positive signs in respect of investor confidence in a given location. In this instance, Eastland's yields are around the average recorded for other centres in Manchester (7.3%). However, yields are forecast to rise to around 8.1% by 2027, a sign that investor confidence in the centre could be stronger.

No data is available relating to the probability of leasing vacant premises, which reflects the centre's low vacancy rate and the fact that it has been some time since property became available.

Pedestrian Flows

As might be expected, the Asda store and adjacent uses were the main focus of pedestrian activity in Eastlands on the day of our site visit. We observed very high footfall in this area and some linked trips between operators in this part of the centre.

The eastern part of the district centre was noticeably quieter, although still moderately busy. There appeared to be few linked trips between the two halves of the centre, especially for those visitors arriving by tram.

Accessibility

Eastlands is located approximately 3 km from Manchester City Centre along Ashton New Road, a major arterial route which links it to Ashton-under-Lyne. The Asda customer car park comprises 958 spaces, 179 of which are made available to football spectators on match days. Nonetheless, the district centre often experiences shortages of car parking during football games and other popular sports events.

The district centre has been able to take advantage of large-scale investments in public transport infrastructure associated with the wider regeneration of East Manchester. This infrastructure includes the Metrolink stop adjacent to the Asda store, the numerous bus stops connecting Eastlands to the City Centre and Tameside, and cycle routes along the length of Ashton New Road.

There is also a substantial walk-in catchment drawn from the residences in Clayton, Beswick and the Waterfront apartments in the north of the district centre.

The western part of the district centre offers much better manoeuvrability for pedestrians, than the eastern half. This is to be expected, given that the Asda and adjacent units are modern and purpose-built.

In contrast, the streets in the eastern part of the centre are more uneven, with street clutter in the form of shop signs and bollards that could prove challenging for people with mobility impairments. On the day of our site visit, this situation was exacerbated by cars parking on the pedestrian footpaths. In general, however, the topography of the centre is fairly flat, and dropped kerbs and tactile paving are provided.

Overall, therefore, Eastlands is considered to perform well with regard to accessibility by public transport, and moderately well in terms of accessibility for people with mobility issues.

Perception of Safety

Eastlands district centre is generally well-maintained, and its open, linear layout allows for a good degree of both natural and passive surveillance. As a consequence, the centre generally feels safe and secure. At the time of our visit, the reasonably high levels of footfall reduced the perceived threat of crime.

Due to the good mix of uses with daytime and evening opening hours, the street frontage remains active for the majority of the day. There is also plentiful street lighting that would help to increase the feeling of safety at night.

While the busy Ashton New Road is an important generator of activity and footfall that support the district centre, the car traffic that passes through Eastlands feels fast-moving at times, even with speeds limited to 30 mph and controlled pedestrian crossing points. This can lead to a perceived threat to safety from passing cars, especially on the south side of the road where the streets are narrower (although we recognise that this area is outside the boundary of the district centre as currently defined).

Environmental Quality

There is an unusual degree of separation between the two 'halves' of Eastlands, to the extent that it feels more like two discrete centres separated by a long stretch of pavement intersected by the Metrolink.

The western part of the district centre is characterised by modern, purpose-built national multiple retail and food/drink operators. This area is managed, so it is free from litter and the trees and other soft landscaping features are well-maintained.

The eastern part comprises the more traditional 'high street'. The street-scene here is mixed, but broadly comprises 20th century buildings with shopfronts on the ground floor and residential flats above. Some of the individual commercial premises are poorly-maintained, but in general the high street is clean, tidy and free from graffiti.

As previously noted, five of the ten high street units are takeaways. All of these operators were shuttered on the day of our visit, forming two clusters of two and three units each. This concentration of shutters that are down in the daytime, coupled with the prominent position and relatively large size of Eastlands' one vacant unit (the former NatWest bank) leads to a perception that the vacancy rate in the centre is high, when in fact it is far below the national average.

The two parts of the district centre can feel disjointed, given the fact that the Asda store lies approximately 300m from the nearest occupied high street unit, with no signage or active street frontages to create a sense of linkage. On the day of our fieldwork visit, we observed a number of visitors arriving to the centre by Metrolink and visiting the western part only. The centre as a whole would benefit from enhanced connectivity to encourage linked trips and allow the two halves to become mutually reinforcing.

The arterial road that bisects the district centre brings footfall and activity which help to sustain it, as well as reflecting its location at the fringe of the successful regional centre of Manchester. Nonetheless, the slight downside of the busy through traffic is that both parts of Eastlands can feel dominated by cars at busy times; the west because of the well-used and expansive surface level car park that serves the Asda terrace, and the east because of the high volume of cars on Ashton New Road.

Thus, our overall conclusion with regard to environmental quality is that there are opportunities for Eastlands to substantially improve its performance in this area. While the centre is generally well-maintained and designed appropriately for its function, it would benefit greatly from interventions to reduce the feeling of separation between east and west and to mitigate the impacts of car traffic at peak times.

Conclusions

The once derelict area of East Manchester has been transformed since the 2000s, with the successful regeneration driven by the development of the Etihad Stadium, Etihad Campus and other sport, leisure and recreation facilities that have acted as catalysts for new investment and infrastructure. Eastlands district centre lies at the heart of this area and draws much of its trade from visitors attracted by various sporting events.

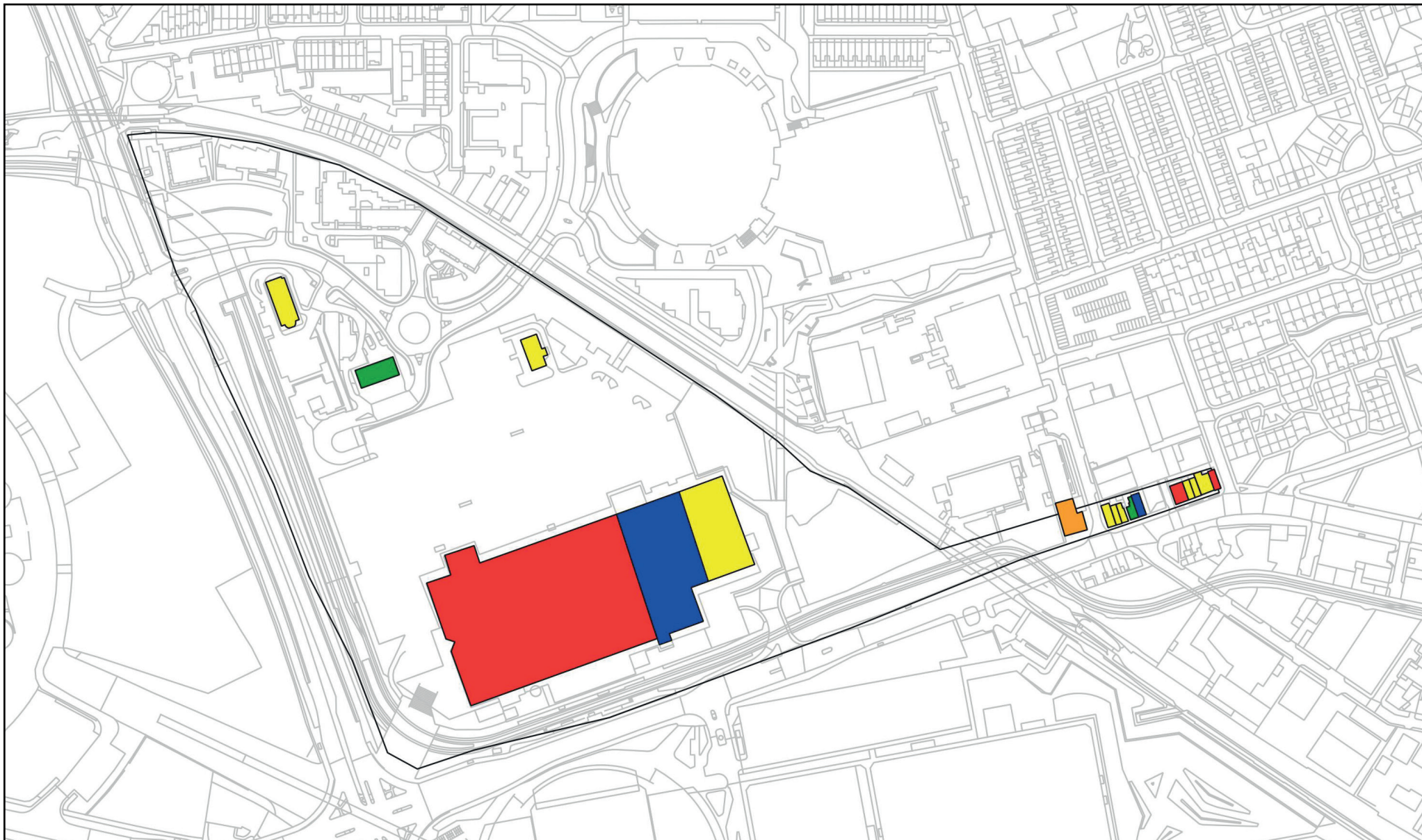
At the same time, the district centre's anchor Asda superstore serves an extensive catchment, taking advantage of local residents and Eastlands' excellent public transport links that connect it to the City Centre and Tameside.

The quanta of comparison and retail services floorspace are lower than would typically be expected from a district centre, but this is largely a reflection of Eastlands' modest size and proximity to Manchester City Centre, as well as the numerous important functions performed by the dominant Asda store. Despite the relative under provision in these sectors, the district centre enjoys high levels of footfall, an exceptionally low vacancy rate, and representation from a range of national multiples including Decathlon.

Where opportunities for improvement exist in Eastlands, these largely relate to its environmental quality. The district centre is somewhat disjointed, with the modern, purpose-built national multiples in the western part being separated from the more traditional high street in the east by a long stretch of pavement, Metrolink tracks, and the centre's only vacant unit. The eastern half is generally less well-maintained and contains clusters of takeaways which keep their shutters down during the day. The district centre as a whole would benefit from enhanced connectivity, including new signage and additional active street frontages, to encourage linked trips and allow the two halves to become mutually reinforcing.

Eastlands' location along the busy Ashton New Road brings significant 'upsides' in the form of footfall and activity which support the successful aspects of the district centre. The slight 'downside' of the busy through traffic are that the centre can feel car-dominated, particularly on busy match days and during events. Mitigation of the adverse impacts of cars could help to ensure pedestrians feel safe and further promote linked trips.

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.



Eastlands district centre

Manchester Retail and Leisure Study

Survey Date - February 2023

Key

Comparison	Leisure Service
Convenience	Retail Service
Financial & Business Services	Vacant