

# Cheetham Hill District Centre

## Description

Cheetham Hill lies around 2.4 km to the north of Manchester City Centre and partly adjoins the neighbouring local authority of Salford. Indeed, some commercial units on the western side of Bury Old Road, adjoining but outside the defined district centre, lie within the administrative area of Salford City Council.

As a result, Cheetham Hill district centre plays an important role in meeting the day-to-day needs of residents of both North Manchester and Salford. 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.

Due to its history as a melting pot for generations of Jewish, Irish, South East Asian, Arabic and Eastern European immigrants, who settled alongside the native population, a number of operators present reflect Cheetham Hill's ethnically diverse community. These include: convenience retailers like the Food Plus Polish shop and Worldwide Foods; comparison stores such as J. Junaid Jamshed (which sells Asian-inspired clothing) and the Huda Islamic Gift Shop; and several food and drink operators.

Cheetham Hill Shopping Centre, which is located on the east side of Bury Old Road, is anchored by a Tesco superstore that opened in 2010. The pedestrianised Shopping Centre provides for 26 modern retail units, with the large storefront windows and other design elements helping to create a more pleasant shopping environment in this part of the centre.

*Table 1 Cheetham Hill District Centre Floorspace Composition*

GOAD Category	Floorspace at 2023 (sq.m)	Floorspace at 2023 (%)	Floorspace UK Average at 2023 (%)
Comparison	4,036	15.1%	30.1%
Convenience	13,285	49.7%	15.5%
Financial	1,384	5.2%	6.6%
Leisure	4,807	18.0%	26.3%
Retail Service	1,626	6.1%	7.2%
Vacant	1,567	5.9%	13.8%
<b>TOTAL</b>	<b>26,705</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 Cheetham Hill District Centre Unit Composition*

GOAD Category	Units at 2023	Units at 2023 (%)	Units UK Average at 2023 (%)
Comparison	19	17.6%	26.9%
Convenience	14	13.0%	9.3%
Financial	13	12.0%	8.7%
Leisure	31	28.7%	25.4%

Retail Service	19	17.6%	15.8%
Vacant	12	11.1%	13.8%
<b>TOTAL</b>	<b>108</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

Cheetham Hill district centre benefits from its strong provision of food retailers. Convenience representation far exceeds the typical levels recorded by Experian Goad. The main reason for the abundance is the Tesco superstore, which on its own accounts for 58.3% of the recorded convenience floorspace. The centre also provides for a further three large format retail units (Worldwide Foods, Istanbul Supermarket, and Iceland). These larger premises are located on and around Crescent Road, close to Tesco and each other. Together with Tesco, the three large foodstores account for 89.1% of Cheetham Hill's convenience space, with the remaining ten of the centre's food shops all measuring less than 450 sq.m.

The district centre is also moderately above the national average in terms of its proportion of convenience units. Only three of Cheetham Hill's convenience stores (21.4%) are national multiples (defined as retailers that are part of a network of nine outlets or more across the UK), these being Tesco, Worldwide Foods and Premier. The other 78.6% are independent operators and the offer includes a bakery, minimarket, greengrocers and health foods store. While there are no standalone butchers, fishmongers or confectioners shops, Tesco, the other large foodstores and the nearby City Centre are able to service these retail needs.

Conversely, Cheetham Hill's proportion of comparison floorspace equates to around half the UK average. The relative underprovision is partly due to the small-scale nature of most of the units on Bury Old Road/Cheetham Hill Road; well over half (57.9%) of the centre's non-food retail units measure less than 200 sq.m. Nonetheless, the district centre also has a marked shortfall in its proportion of comparison units compared to the national average.

The existing comparison offer at Cheetham Hill is largely composed of independent operators, with the only national multiples being the British Heart Foundation and Scope charity shops. There is a concentration of non-food retailers within and around Cheetham Hill Shopping Centre, with additional small units scattered along the main shopping street. Cheetham Hill lacks some of the comparison retail uses that would typically be expected within a district centre of its size, in particular a chemist. However, the Tesco superstore contains a pharmacy. Indeed, it should be noted that the large foodstores in the district centre, especially Tesco, sell a broad range of comparison goods which helps to fulfil residents' day-to-day requirements.

Leisure uses are dispersed along Bury Old Road, particularly to the north of the district centre. The centre is well below the national average in terms of its proportion of leisure floorspace. There are no large footprint leisure facilities, such as a cinema or bingo hall, nor is there any gym or health/fitness club. Some of the district centre's buildings were originally public houses, but these have long since closed (with the premises now in other uses) and it no longer contains any pubs or nightclubs. This leisure offer reflects the relatively small size and format of much of Cheetham Hill's commercial stock and its role as a district centre. As expected, the nearby Manchester City Centre is more of a focus for major or large-scale leisure uses.

In contrast, Cheetham Hill's leisure provision is concentrated on smaller-scale food and drink uses. Thus, the centre is far above the national average in terms of its proportion of leisure units. These units almost entirely comprise cafés, restaurants, and takeaways. The majority of operators are independent, although there is representation from national multiples including Costa and Dixy Chicken. These food and drink uses form the basis of the centre's evening economy, adding vibrancy and footfall after daylight hours.

The provision of financial and business services and retail services in Cheetham Hill is broadly in line with the relevant national averages. The majority of services operators are independent, and the centre provides for a good range of uses including a NatWest bank; multiple estate agents, pawnbrokers and solicitors; numerous beauty/hair salons and barbershops; opticians; travel agents and drycleaners.

## Daytime/Evening Economy

Cheetham Hill's daytime economy is underpinned by its convenience offer, particularly the busy Tesco and Iceland supermarkets which draw expenditure from a substantial catchment made up of residents of North Manchester and Salford. Tesco opens to 12am from Monday to Saturday, and a number of the centre's other food retailers extend their opening hours into the evening. For example, the Kashmir Mart and Istanbul Supermarket are open daily until 9pm and 10pm respectively.

The main element of the district centre's evening economy, however, is its restaurant and takeaway offer. The centre has a good range of restaurants serving Turkish, Asian fusion, Chinese, Indian, Pakistani, Afghani and Persian cuisines, and two steakhouses. Takeaways are the leisure use with the most representation in Cheetham Hill and are scattered throughout the centre. As a result, there is a good level of activity until late into the night.

## Vacancies

At the time of our site visit, Cheetham Hill's floorspace vacancy rate was just 5.9%, less than half the UK average of 13.8%. The centre's unit vacancy rate of 11.1% was more in line with national trends, although still notably lower than the average of 13.8%.

All of the twelve recorded vacancies were small in scale, being less than 450 sq.m, with half of them measuring less than 100 sq.m. The largest vacant unit was the former Auto Care Centre vehicle repair shop on Seymour Road, which is located behind the main shopping street and therefore screened from view from the rest of the district centre. More prominent in the street-scene was the former takeaway at 438 Cheetham Hill Road, which is freestanding and surrounded by overgrown scrubland on both sides, but a sign on this unit on the day of our fieldwork visit indicated that it had been recently let.

The vacant premises were evenly distributed throughout the district centre. The negative effect that they had on the look and feel of the centre was exacerbated by the number of units that open solely in the evenings, primarily takeaways, leading to clusters of closed shutters on parts of Bury Old Road/Cheetham Hill Road during the daytime.

## Opportunity Sites

While it will be important to repurpose or reoccupy the identified vacant units, the limited scale of the majority of premises in Cheetham Hill's main shopping street means that there are few medium-to-large-scale redevelopment opportunities.

An exception is the Grade II listed former Crumpsall and Cheetham Hill Library, which is a large, dilapidated building in a prominent location next to the Kashmir Mart. The former library was sold at auction to a property company in 2015 at a cost of over £0.5m, but it appears that no progress has since been made in bringing it back into active use. The building therefore represents a key opportunity site in the core of the district centre.

More generally, 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 in and revitalisation of the centre.

## Market Summary

With reference to CoStar data sourced in June 2023, the average annual market rent per sq.ft currently achieved in Cheetham Hill is £16.64, with this figure representing a 4.7% increase on the £15.89 per sq.ft

average achieved in the previous 12-month period. Another positive sign is that the average market sale price per sq.ft has increased over the past 12-month period by 17.4% to £131 per sq.ft. CoStar currently predicts that this uptick will continue, albeit at a slower pace, with market rents reaching circa £17.50 per sq.ft by 2027.

In respect of yields, CoStar find that the current market yield is 7.6%, with this figure having decreased from the 9.0% market yield observed in the previous 12-month period. The market yield in Cheetham Hill is forecast to rise again, to circa 8.3% over the period to 2027, but is not anticipated to return to the previous high.

Increases in rents and decreases in yields are generally considered positive signs in respect of investor confidence in a given location. In this instance, Cheetham Hill's yields are higher than those recorded in other centres in the area (tying with Wythenshawe as the third highest of Manchester's seventeen district centres) and, despite the recent decrease, are forecast to rise in the short to medium-term. This is a sign that investor confidence in the centre could be stronger.

In respect of the probability of leasing vacant premises, 50% of premises can be anticipated to be leased after around nine months on the market, with approximately 80% of premises being let within fifteen months.

## Pedestrian Flows

At the time of our visit, Cheetham Hill district centre as a whole attracted a reasonably high level of footfall. Pedestrian activity was concentrated around the Cheetham Hill Shopping Centre at the northern end of the district centre, and particularly the Tesco superstore.

As noted in the introduction, the district centre is linear in nature, being centred around Bury Old Road/Cheetham Hill Road, a key arterial route connecting Manchester City Centre with the M60 motorway. The advantage of this location is that Cheetham Hill benefits from a substantial level of pass-by trade and activity from road users. However, as with many locations around major cities, the potential drawbacks of busy through traffic relate to a feeling of car dominance, noise and air pollution, and impediments to pedestrian movements throughout centres.

In Cheetham Hill, efforts have been made to separate foot and car traffic including tree planting, granite bollards and other street furniture. There are also a number of controlled crossing points. While these measures did somewhat reduce the impact of vehicular traffic on pedestrian flows across the centre, the road still formed something of a barrier and restricted visitor movements in certain places.

The pedestrianised Shopping Centre was an exception in this regard, being secluded from the road and helping to create a more pleasant shopping environment in that part of the district centre.

## Accessibility

Cheetham Hill district centre is considered to have a generally high standard of accessibility in respect of its catchment area, which is largely drawn from local residents of North Manchester and Salford.

Bury Old Road (A665) is one of the main arterial routes into Manchester City Centre from the north, being connected to the M60 motorway (Junction 19) and Bury New Road in Whitefield. To the south, Cheetham Hill Road is linked to the Manchester Ring Road and wider City Centre.

Most of the large format foodstores have their own customer car parks, with Worldwide Foods' 80 spaces being accessed off Crescent Road, Iceland's 83 spaces being accessed off Tyson Street, and Tesco's 400 spaces being accessed off Thomas Street. Beyond that, there is free 70-space car park operated by Salford City Council located on George Street North to the west of the district centre, and a limited number of free on-street spaces along Bury Old Road/Cheetham Hill Road which are available for up to one hour from 7am and 7pm Monday to Saturday and otherwise unrestricted.

Numerous bus routes along Bury Old Road/Cheetham Hill Road provide for the district centre, serving routes including: 52 Orbits (Trafford Centre to Failsworth), 59 (Piccadilly Gardens to Oldham Mumps), 94 (Higher Crumpsall to Bury), 135 (Piccadilly Gardens to Bury), 151 (Higher Crumpsall to Ashton-under-Lyne), 717 (Higher Blackley to Strangeways), 721 (Charlestown to Strangeways) and 733 (Cheetham Hill to Whalley Range). These services provide frequent access to the City Centre and a range of other destinations in Greater Manchester. The Crumpsall and Abraham Moss Metrolink Stations are also within walking distance.

Although there are plentiful Sheffield stands for bicycle parking provided to the north of the district centre, there are no dedicated cycle lanes and the heavy car traffic may deter some visitors from this mode of transport.

In terms of the manoeuvrability of the district centre, particularly for those with mobility impairments, the variation in the width of footpaths could prove challenging. As might be expected, footpaths are typically wider and higher in quality near the newer Shopping Centre in the northern part of Cheetham Hill.

As previously noted, although the busyness of the main shopping street (Bury Old Road/Cheetham Hill Road) brings many advantages for the district centre, the road can form something of a barrier to pedestrians seeking to cross from one side to the other. In addition, merchandise from some retailers is displayed on the streets in front, which can create clutter and cause difficulties for disabled or elderly visitors.

In general, however, the topography is fairly flat, bollards/boulders prevent any encroachment of cars into pedestrian space, and benches and seating are provided to allow users to stop and rest when needed. Accessibility for those with impairments is therefore considered to be reasonably good.

## Perception of Safety

During our site visit, the good level of footfall and the level of natural surveillance offered by the linear centre meant that the district centre felt generally safe. There is plentiful street lighting and (as previously discussed) a number of the Cheetham Hill's operators have opening hours that extend late into the evening, which would contribute to a feeling of safety at night.

However, as recorded above, a high number of units had their shutters down on the day of our site visit, either because they were vacant; used for businesses like takeaways that open in the evenings; or operated by small, independent businesses that close on certain days of the week. Clusters of units not in active use at ground floor level were observed throughout Cheetham Hill, although they were more frequent at the southern end. The overall effect was to reduce the perception of activity in some parts of the district centre.

## Environmental Quality

The streetscape of the district centre is interesting and there is a high level of variation in design, materials and heights. In general, however, the centre is characterised by 20th-century red brick buildings of two or three storeys, often with commercial uses on the ground floor and flats or offices above.

Unfortunately, many of the shopfronts and units are poorly maintained and dilapidated, particularly towards the southern end of the centre. As described above, deteriorating standalone buildings like the Grade II listed former library are especially conspicuous. Remedying this issue will likely require substantial investment.

In contrast, the newer Shopping Centre to the north of the district centre is somewhat better maintained, with a modern, uniform appearance.

Cheetham Hill benefits from activity and footfall as a result of the busy road through its centre. However, as with many locations around major cities, the traffic which sustains centres can detract from the quality of the environment due to the impacts of congestion and pollution, especially at busy times. Cheetham Hill experiences some of these negative impacts as a result of its location along the key arterial route of Bury Old Road/Cheetham Hill Road, although they are partially mitigated through measures such as tree planting and the provision of bollards and other street furniture to separate vehicles from pedestrians.

We observed a moderate amount of graffiti and litter in the centre on the day of our site visit, but this is generally curtailed by the long opening hours of many operators and the numerous bins placed along the main road.

## Conclusions

Cheetham Hill district centre serves an important convenience function for a localised catchment composed of residents of North Manchester and Salford.

Due to the small-scale nature of most of its units and its role as a district centre, Cheetham Hill's leisure offer is focussed on food and drink uses, rather than the large-scale leisure venues which are concentrated in the nearby City Centre. The centre's restaurants and takeaways form the basis of its evening economy, which brings activity to the centre until late into the night.

Cheetham Hill lacks some of the standalone comparison uses usually seen in a centre of this size (including a chemist), but the 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.

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 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.

The district centre is highly accessible and experiences a reasonably good level of footfall, particularly around the Tesco superstore and Cheetham Hill Shopping Centre at the northern end of the centre. However, the drawback of the trade and activity generated by the car traffic along Bury Old

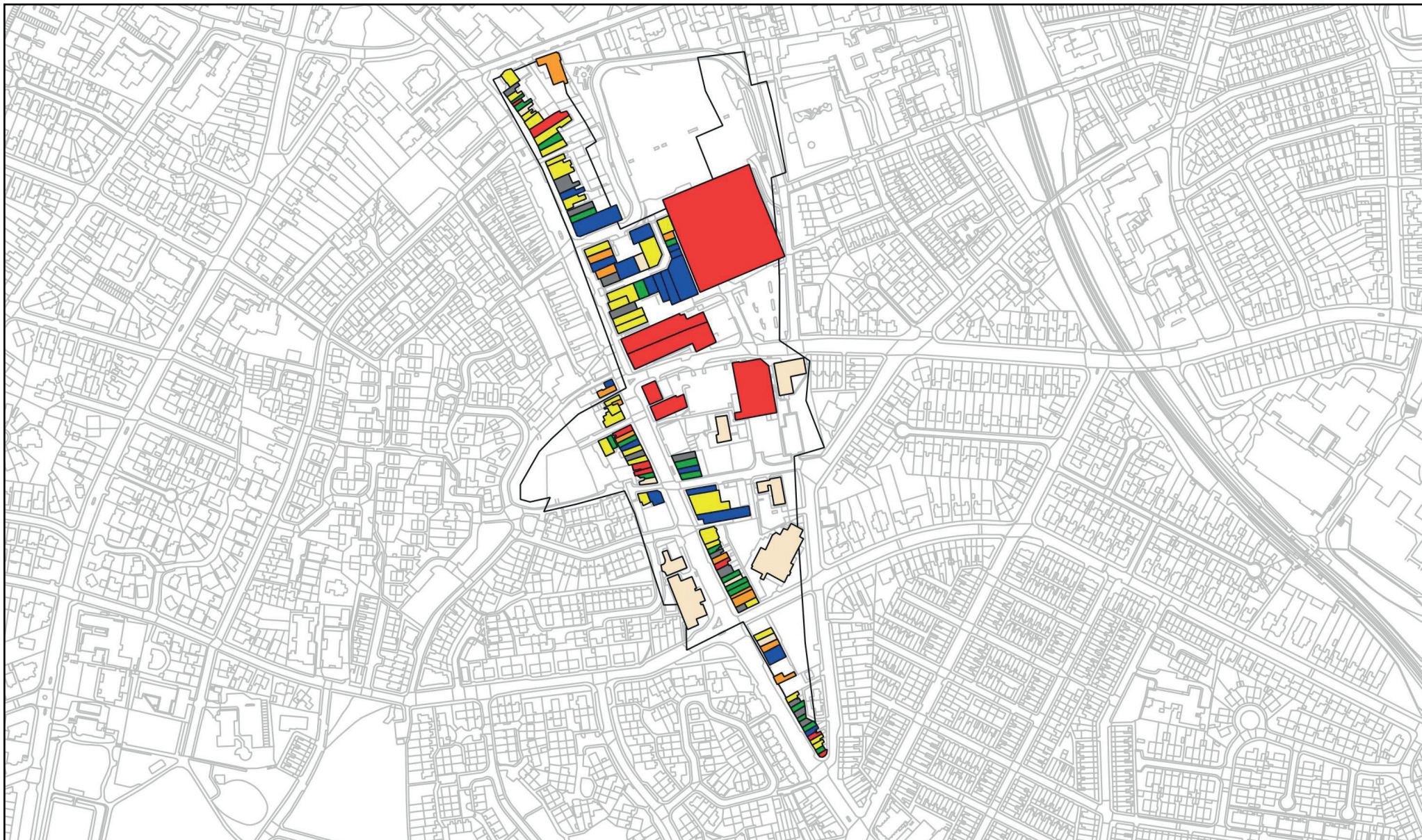


Road/Cheetham Hill Road is that it can be difficult to traverse certain parts of the centre at busy times and there are some negative impacts from noise and air pollution.

Market rents have recently increased in the district centre, while market yields have decreased. These are generally considered to be positive signs, although we note that yields are forecast to rise again over the next few years, suggesting that investor confidence could be stronger. Manchester City Council has announced its intention to produce a regeneration plan for Cheetham Hill in 2023, and we anticipate that this work will help to stimulate much-needed investment in the centre and allow stakeholders to capitalise on opportunity sites.

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.





## Cheetham Hill district centre

### Manchester Retail and Leisure Study

Survey Date - February 2023

#### Key

Comparison	Leisure Service
Convenience	Retail Service
Financial & Business Services	Vacant