

Chorlton District Centre

Description

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. 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.

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. 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 1 Chorlton District Centre Floorspace Composition

GOAD Category	Floorspace at 2023 (sq.m)	Floorspace at 2023 (%)	Floorspace UK Average at 2023 (%)
Comparison	5,321	15.6%	30.1%
Convenience	5,758	19.4%	15.5%
Financial	1,507	4.4%	6.6%
Leisure	11,679	34.2%	26.3%
Retail Service	5,002	14.7%	7.2%
Vacant	4,011	11.8%	13.8%
TOTAL	34,127	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 Chorlton District Centre Unit Composition

GOAD Category	Units at 2023	Units at 2023 (%)	Units UK Average at 2023 (%)
Comparison	40	15.8%	26.9%
Convenience	28	11.1%	9.3%
Financial	16	6.3%	8.7%
Leisure	96	37.9%	25.4%
Retail Service	42	16.6%	15.8%
Vacant	31	12.3%	13.8%
TOTAL	253	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

With 253 commercial operators, Chorlton is the largest of Manchester's district centres in terms of its number of units (and third largest with respect to floorspace). Most of the centre's commercial premises comprise the ground floors of converted Victorian/Edwardian terraces and are therefore small in scale with limited opportunities for expansion.

Leisure is the most prevalent commercial use within the centre, accounting for proportions of floorspace and units significantly above the UK averages. Indeed, Chorlton's independent leisure offer is one of its strengths, especially its array of independent restaurants, cafes, pubs and bars; hence the popularity of the district centre as a food and drink destination for residents of South Manchester and further afield. The district centre has 84 independent food and drink outlets. These operators are generally relatively high-quality and cater for a diverse range of cuisines. They are dispersed throughout Chorlton, mostly in small-format units measuring less than 200 sq.m, with stretches of frontages on both sides of Barlow Moor Road in the south of the centre being almost entirely in leisure use.

Conversely, national multiple representation in the leisure sector is fairly limited, with the only food and drink chain operators being KFC, McDonalds, Subway, Pizza Hut, Papa Johns, Dominoes and Wetherspoons (The Sedge Lynn pub). Since the closure of Chorlton Leisure Centre in 2015, there have been no large floorplate leisure uses in the centre (such as a swimming baths, bowling alley or cinema). This gap in provision is largely a reflection of the small size of much of Chorlton's commercial stock, together with the close proximity of comparable facilities like Hough End Leisure Centre.

Chorlton is slightly 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, which measures 1,860 sq.m, meaning that this unit alone makes up 32.3% of Chorlton's convenience floorspace. 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 high-quality, independent convenience operators, including bakeries, butchers, a cheese shop, delicatessens, a fishmonger, greengrocers, off-licenses, and a sweet shop. Unicorn Grocery in the north of the centre, which specialises in organic and fairtrade food, is owned and run by a workers' co-operative.

Given that the district centre chiefly performs a convenience and leisure/service role for local residents, its non-food shopping floorspace is more limited. Only 15.6% of the centre's floorspace is used for comparison retailing, which equates to just over half the national average of 30.1%. It should be noted, however, that this provision is supplemented by the range of non-food goods sold from the Morrisons store in the east of the centre.

Most of the comparison traders are located on Wilbraham Road, which runs west to east through the middle of the district centre, or within the Chorlton Cross Shopping Centre. The majority of non-food shops 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.

Chorlton performs well in terms of its offer of retail services, providing for all of the services that would be expected in a centre of this size, including numerous barbers/hairdressers, beauticians, opticians and a post office. The district centre also provides for a reasonable range of financial and business services (including banks, estate agents and solicitors), which are concentrated around the Barlow Moor Road/Wilbraham Road crossroads.

Daytime/Evening Economy

Chorlton's daytime economy is underpinned, to a large extent, by its retail and service offer. These businesses are generally open from 9am to 5pm, with several having operating hours that extend earlier or later than these times in order to accommodate the sizeable cohort of commuters who pass through the district centre before or after work. These activity hours are considered to be suitable to meet the daytime needs of the catchment.

Moreover, Chorlton benefits from a bustling evening economy, largely centred on its restaurants, bars and takeaways that open late into the night. The good evening performance is a key strength of Chorlton, particularly in comparison to Manchester's other district centres.

Vacancies

The vacancy rate in Chorlton is below the national average, both with respect to units and floorspace. The unit vacancy rate is 12.3%, which compares with a UK average of 13.8%, and the floorspace vacancy rate is 11.8%, which again is lower than the UK norm of 13.8%.

There are vacancies scattered throughout the district centre, but with modest concentrations within the Chorlton Cross Shopping Centre, on Manchester Road in the most northernly point of the district centre, and on the south side of Barlow Moor Road. While they do detract from the environment of the district centre, particularly within the Shopping Centre, these vacant units are mostly small in scale (measuring less than 200 sq.m) and thus the adverse impact on the street-scene is limited.

The largest vacant commercial premises is the Chorlton Picture House building on Manchester Road, which was previously occupied by Co-op Funeralcare and which measures 767 sq.m. Another prominent vacancy is the former Chorlton Leisure Centre, which sits at the northern gateway to the district centre (also on Manchester Road). However, the Shopping Centre, Picture House and leisure centre buildings are all due to be redeveloped for new housing, as outlined below.

Opportunity Sites

Due to the small size and format of much of Chorlton's commercial stock, there are limited opportunities to expand successful businesses, or to attract modern larger-scale operators, particularly national multiple retailers.

Most of the significant development opportunities currently identified in Chorlton are residential-led schemes. These opportunities include the proposed redevelopment of:

- Chorlton Cross Shopping Centre, for up to 190 homes and up to 2,000 sq.m of retail floorspace by the Greater Manchester Pension Fund, which appointed a development partner in March 2023;
- the former Chorlton Leisure Centre, to provide for 50 affordable apartments for over 55s, by Manchester City Council in partnership with MSV Housing Group, which received planning permission for the project in August 2023 (ref: 136791/FO/2023); and
- Chorlton Picture House, by Southway Housing Trust in association with the Chorlton Community Land Trust, with the detailed proposal still being drawn up but likely to comprise affordable housing and commercial uses including a potential food hall.

Market Summary

With reference to CoStar data sourced in June 2023, the average annual market rent per sq.ft currently achieved in Chorlton is £17.54, with this figure representing a 2.6% increase on the £17.09 per sq.ft average achieved in the previous 12-month period.

Additionally, the average market sale price per sq.ft has increased slightly over the past 12-month period, up 1.1% to £193 per sq.ft. Notwithstanding this, Costar currently predicts market rents to remain fairly steady, increasing gradually to just below £18.00 per sq.ft by 2027.

In respect of yields, CoStar find that the current market yield is 7.1%, with this figure remaining the same as the market yield observed in the previous 12-month period. The market yield in Chorlton is forecast to rise again, to circa 7.9% 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, Chorlton's yields are slightly below the average recorded for other centres in Manchester, suggesting a fairly 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 5.5 months on the market, with approximately 80% of premises being let within 12 months.

Pedestrian Flows

Footfall in Chorlton on the day of our site visit was reasonably high, especially given the cold and damp weather. Rather than being concentrated around the central crossroads and Shopping Centre, as might be expected given that this area forms the traditional retail heart of the district centre, pedestrian activity was dispersed throughout Chorlton.

The Morrisons store was observed to be busy, but there appeared to be few linked trips between the supermarket and wider district centre.

The disjointed nature of Chorlton's public realm adversely impacts on its legibility and walkability. Improved pedestrian connectivity between the different parts of the district centre could be achieved through increased footfall and ensuring that a greater proportion of ground floor frontages are active during daytime hours. 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.

Accessibility

Chorlton is easily accessible by public transport, benefitting from the Metrolink stop adjacent to the Morrisons store in the east of the centre, and from a number of frequently-served bus stops along its two key roads. These interchanges connect Chorlton with the City Centre, Trafford Centre and other parts of Greater Manchester.

Congestion and traffic can make it difficult for those travelling by car to the district centre, especially near the intersection of Wilbraham and Barlow Moor Roads. Chorlton offers reasonably good levels of car parking for visitors, with the 240-space Morrisons car park being free for customers for up to 2 hours. Limited street parking is also available on the two main shopping streets (for up to 2 hours) and on the side streets.

In addition, there is currently a 190-space pay-and-display car park to the west of Chorlton Cross Shopping Centre, called The Square, which allows for 24-hour use. We note, however, that this car park is proposed to be removed by the development of Chorlton Cross and replaced mainly by 'residents only' parking with around 20 visitor spaces.

Movements around the centre by bicycle and on foot are hampered by illegal parking of cars on the pavements in front of Chorlton's retail frontages, particularly on Wilbraham Road in the eastern part of the centre, and in its few cycle lanes. In addition, some of the pavements in the district centre are uneven and cluttered with A-board signs or other impediments, and there are few seating areas for those needing to stop and rest, leading to further issues with walkability.

Manchester City Council has committed £13.4m worth of investment, with funding coming from the Greater Manchester Mayor's Challenge Fund and the government's Cycle Cities Ambition Grant, to delivering a new Manchester to Chorlton Walking and Cycleway. The new 5km route will run along Barlow Moor Road, Manchester Road, Upper Chorlton Road and Chorlton Road, connecting Chorlton to Manchester City Centre by foot and cycle. The project is well advanced, with some of the new bicycle lanes under construction on the day of our site visit, and therefore we anticipate that some of the identified accessibility issues will soon be alleviated.

Perception of Safety

Chorlton generally feels safe and secure, with this perception being supported by the good levels of footfall and natural surveillance. Indeed, crime rates in Chorlton are among the lowest in Greater Manchester.

Traffic congestion and the volume of vehicular movements that pass through the two main shopping streets have a modest negative impact on the overall standard of pedestrian safety. Nonetheless, we recognise the benefits of the busy roadside location in terms of bringing activity and pass-by trade to Chorlton.

Environmental Quality

Chorlton contains a mix of architectural styles. On the positive side, the covered Victorian and Edwardian shopfronts along the western side of Wilbraham Road, high-quality heritage assets like the Grade II listed Sedge Lynn pub, and the mature trees lining the main shopping frontages all contribute to a lively and interesting streetscape. On the negative side, a number of buildings are poorly-maintained and of low architectural quality, with the former Leisure Centre in the north of the district centre being a prominent example. Chorlton Cross Shopping Centre is in similar need of redevelopment, with its appearance being tired, dated and unsuited to a modern shopping environment.

Chorlton's public realm feels disjointed. The centre is elongated in nature, especially along Manchester Road and Barlow Moor Road, and the main commercial frontage is frequently interrupted by stretches of residential development and businesses that are shuttered during the day. The fragmentation leads to a lack of activity in key areas, especially towards the south of the centres, and detracts from the overall perception of Chorlton's environment.

Conclusions

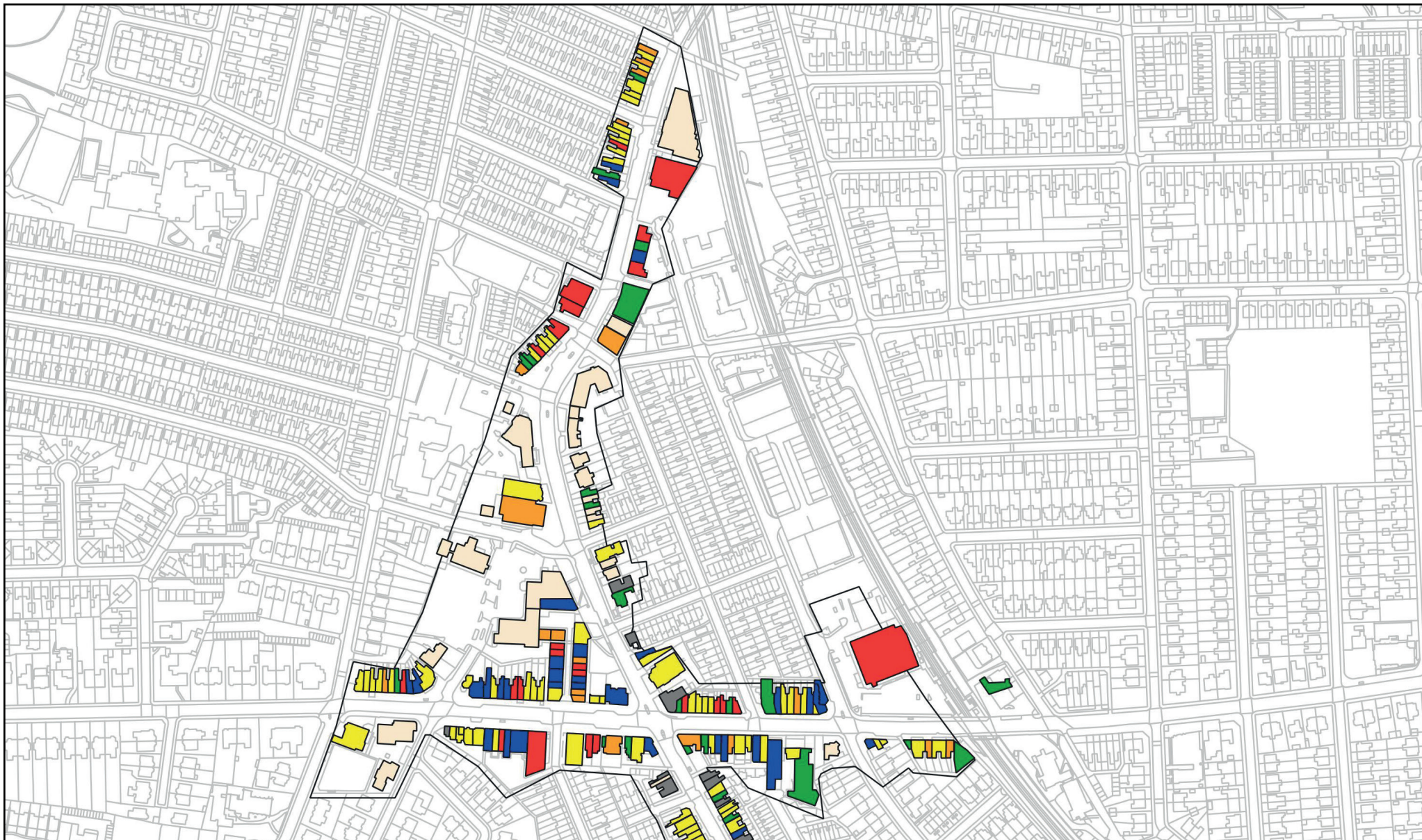
Chorlton is a large district centre whose accessibility by public transport, and distinct and varied food/drink offer, mean that it attracts a substantial number of visitors from across South Manchester. The centre chiefly performs a convenience and leisure/service role for local residents, being

anchored by a large Morrisons store supported by a range of largely independent restaurants, cafes, bars and pubs. Vacancy rates are below the national average, with some of the more prominent empty units due to be redeveloped for housing in the short to medium term.

Traffic congestion and cluttered/uneven pavements cause issues for those seeking to traverse the centre by car, bicycle and foot. The new Manchester to Chorlton Walking and Cycleway, which was being implemented on the day of our visit, should alleviate some of these accessibility issues.

Chorlton's public realm can feel disjointed, especially along Manchester Road/Barlow Moor Road, where long stretches of residential development and shuttered businesses lead to a feeling of fragmentation and areas of low activity. The centre would benefit from improved signage and other interventions to enhance the sense of connectivity and coherence.

Overall, however, we consider that Chorlton is performing reasonably well in meeting the day-to-day needs of its local residents. The district centre is moderately 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.



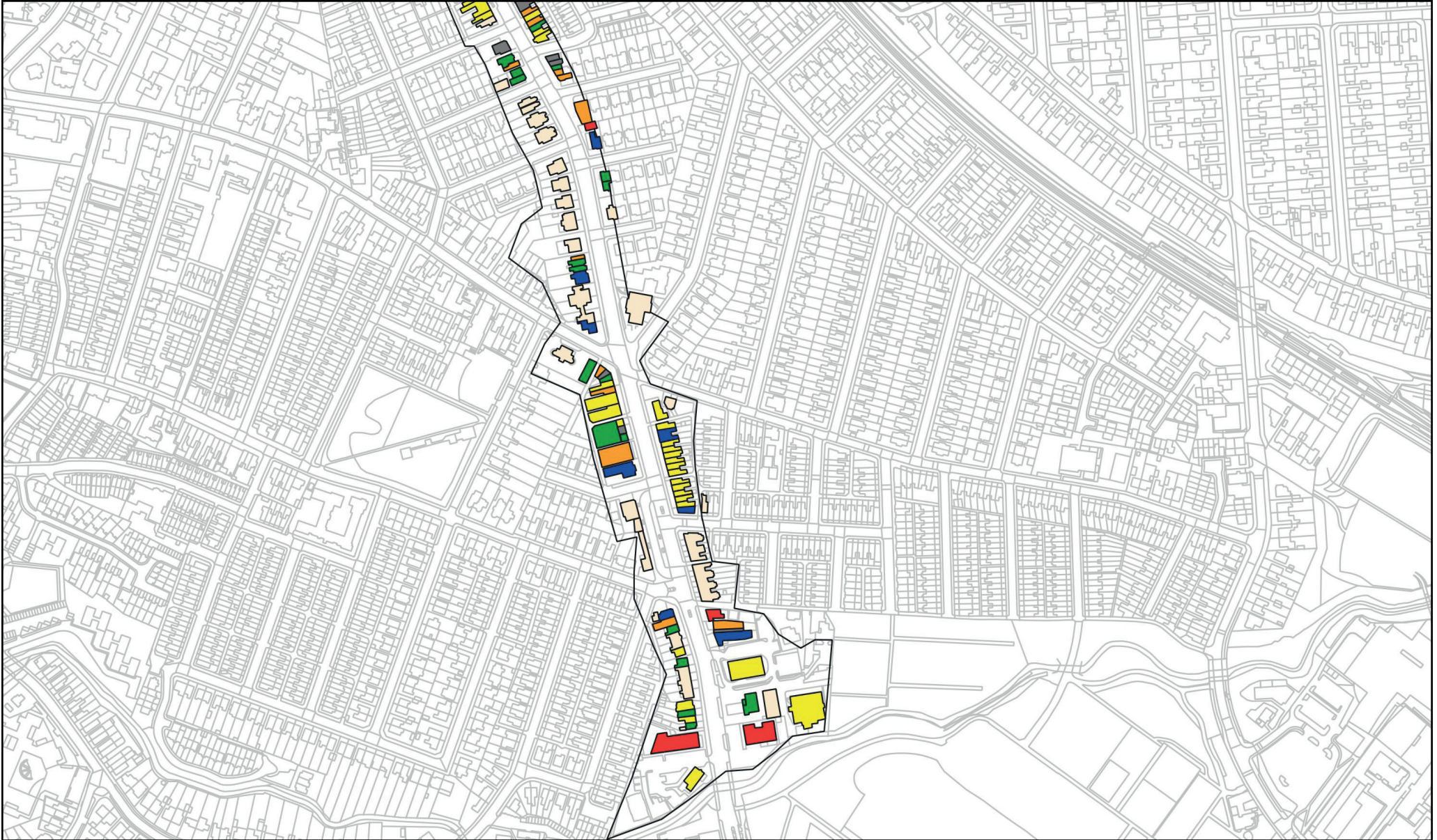
Chorlton district centre (north)

Manchester Retail and Leisure Study

Survey Date - February 2023

Key

Comparison	Leisure Service
Convenience	Retail Service
Financial & Business Services	Vacant



Chorlton district centre (south)

Manchester Retail and Leisure Study

Survey Date - February 2023

Key

Comparison	Leisure Service
Convenience	Retail Service
Financial & Business Services	Vacant