Manchester City Centre

Description

Manchester city centre is the primary destination for shopping and leisure provision in the Greater Manchester area. The centre therefore provides a comprehensive offer, geared at meeting the needs of those within the authority area, but also throughout the North West and the Country as a whole.

The retail offer in the city centre is underpinned by a strong range of key national multiple operators, which are generally located in and around the Arndale Centre and Market Street. These locations provide a sizeable quantum of high quality, modern retail and wider commercial floorspace, and are accompanied by a range of restaurants, bars and cafés. Elsewhere in the city centre, independent and more specialist operators are situated in and around Exchange Street and King Street in particular, and provide a unique retail and shopping experience.

In respect of the food and drink offer in the city centre, the greatest clusters of restaurants, bars and cafés are located within key areas such as Exchange Square, the Northern Quarter, Deansgate and Oxford Road. These operators play a key role in supporting the function of the city centre, and in driving footfall and activity into it, particularly helping to support the evening economy.

Manchester is subject to significant planned investment, which includes the transformation of the Great Northern Warehouse at Deansgate into high quality office spaces and apartments, the repurposing of the former Debenhams and House of Fraser units and the redevelopment and improvement to Piccadilly Gardens. These developments have the potential to further enhance the city's image making it more attractive to businesses, investors and tourists.

The city centre comprises a number of distinct areas, these include:

- Northern Quarter and Ancoats - This area is known for its independent shops, bars, and restaurants and galleries. It is also home to street art and quirky architecture. The Ancoats area was once an industrial hub but has been transformed into a trendy neighbourhood with a vibrant food and drink scene. It's also home to several creative and tech companies.
- Spinningfields - This area is the commercial office heart of Manchester and home to many large companies, including law firms and financial institutions. It also has many high-end restaurants and bars.
- Castlefield - This area is known for its historic architecture, canals, and Roman ruins. It is a popular spot for walks and outdoor activities, a range of leisure operators, along with outdoor events in the summer.

- The Arndale Shopping Centre and Market Street Area - The Arndale Centre is a large shopping mall located in the heart of Manchester, with over 200 stores and restaurants. Market Street is a pedestrianised shopping street that runs through the city centre and is lined with shops, cafes, and street performers. The Arndale and Market Street area is known for its vibrant atmosphere and diverse range of shops, from high-end designer boutiques to budget-friendly retailers. Visitors can find everything from clothing and accessories to electronics and homewares, making it a popular destination for shoppers of all ages and budgets. There are also several cultural attractions in the area, including the Manchester Art Gallery and the Royal Exchange Theatre.
- St Ann’s Street, Kings Street and surrounding area - features a variety of retail and commercial establishments and high-end fashion stores and luxury brands.
- Chinatown - This area is home to many Chinese restaurants, supermarkets, and shops. It also has an archway entrance and ornamental gates.
- Gay Village - This area is known for its vibrant LGBTQ+ community and nightlife. It has many bars and clubs that cater to the LGBTQ+ community.
- Piccadilly Gardens – Piccadilly Gardens is a popular meeting point and a hub for public transport in the city, with a tram stop, bus station, and train station all located nearby. The Gardens themselves are a green space surrounded by various buildings, including; hotels, restaurants, shops, and cultural attractions, the Manchester Art Gallery, the Royal Exchange Theatre, and the Arndale Centre shopping mall.
- Oxford Road Corridor - This area is home to several university buildings and cultural institutions, including Manchester Museum and Whitworth Art Gallery. It also has many independent shops and restaurants.
- Deansgate - This area is known for its luxury shopping, high-end restaurants, and historic architecture. It's also home to the Beetham Tower, which is one of the tallest buildings in the UK outside of London.
- St. Peter's Square - This area is home to several important cultural institutions, including the Manchester Central Library and the Manchester Town Hall. It's also a major transportation hub with tram and bus connections.

Table 1 City Centre Floorspace Composition

GOAD Category	Floorspace at 2023 (sq.m)	Floorspace at 2023 (%)	Floorspace UK Average at 2023 (%)
Comparison	134,270	22.0%	30.1%
Convenience	36,650	6.0%	15.5%
Financial	18,920	3.1%	6.6%
Leisure	320,870	52.6%	26.3%
Retail Service	6,310	1.0%	7.2%
Vacant	92,770	15.2%	13.8%
TOTAL	**609,790**	**100.0%**	**100.0%**

Source: Composition of the city 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 City Centre Unit Composition

GOAD Category	Units at 2023	Units at 2023 (%)	Units UK Average at 2023 (%)
Comparison	510	25.3%	26.9%
Convenience	144	7.1%	9.3%
Financial	79	3.9%	8.7%
Leisure	907	44.9%	25.4%
Retail Service	42	2.1%	15.8%
Vacant	337	16.7%	13.8%
TOTAL	**2019**	**100.0%**	**100.0%**

Source: City 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

Manchester city centre is anchored by a strong range of comparison and leisure service operators in particular, with these accounting for 25.3% and 44.9% of the total stock of commercial units respectively.

The comparison retail offer in the city centre is lower than the current national average, with comparison operators accounting for approximately 134,270 sq.m of floorspace. This figure equates to 22.0% of the total floorspace in the city centre, compared to the national average floorspace figure for comparison goods of 34.0%. There are 510 comparison goods operators in the city centre, a figure which represents 25.3% of all units in the city centre, falling just below the national average of 26.9%.

In respect of the operators, the city centre is well represented by a range of national comparison goods multiples, which are generally located around Market Street, The Arndale and Kings Street. These areas provide a significant quantum of modern retail floorspace, which includes some larger floorplates.

The Arndale is anchored by operators including Next, Selfridges, M&S and New Look, and a number of other major national multiples, including H&M and Primark are located elsewhere within the city centre. The fashion-based retailers are largely concentrated either in the Arndale or on major routes within the vicinity of the centre. However, it should be noted that the range of key operators has reduced in the city centre in recent years through the closure of Debenhams on the corner of Market Street.

At the time of our visit, the range of non-fashion comparison retailers in the city centre are considered to be robust and diverse. Specialist retailers such as WH Smith and Waterstones are well-represented in the city centre, alongside major mixed goods retailers such as TK Maxx and Boots. This demonstrates that there is a broad diversity of retailers in the city centre, including high-end specialist retailers and value retailers, as well as a diverse range of independent operators. Accordingly, it is considered that the city centre retains a strong diversity of comparison goods operators and units, despite some changes and turnover in the market in recent years.

At the time of our visit, we recorded 144 convenience goods operators in the city centre. These operators equate to 36,650 sq.m of floorspace, or 6.0% of the total retail floorspace. Whilst this figure is somewhat below the current UK national average, it is not considered unusual in respect of city centre floorspace composition, and is indicative of the strength of the competing edge and out-of-centre convenience retail offer.

The convenience retail units offer a range of shops including bakers, grocers and frozen foods. Aldi, Lidl, Sainsbury's Local and Tesco Express convenience stores have presence in the centre, as well as several smaller convenience stores and newsagents, health food stores, delicatessens and tobacconists. The convenience offer in the Chinese Quarter is particularly strong, with a particularly strong Asian food supply. These retailers are located throughout the area.

Overall, it is considered that the comparison and convenience retail offering is strong and diverse. Notwithstanding these figures being somewhat below the national averages, particularly in terms of the proportion of floorspace, residents do have good access to larger food stores within proximity of the city centre, and access to a range of smaller national multiple and independent convenience operators within the city centre itself.

Services (retail, leisure and financial and business) comprise a total of 50.9% of units, and 56.8% of all floorspace in the city centre.

There are 907 individual leisure service units within the city centre, accounting for approximately 320,870 sq.m of floorspace or 52.6% of total retail floorspace. This figure is significantly higher than the national average of leisure service floorspace of 26.0%.

The leisure service offering within the city centre is diverse and reflects Manchester's role as a major national and regional centre. It includes a range of restaurants and food outlets, including national operators such as Wagamama, Cote, Zizzi, Nando's and Pizza Express, a number of public houses, bars, nightclubs and cafés. Furthermore the city centre includes a number of theatres and cinemas such as Vue Cinema, Palace Theatre, O2 Ritz and Royal Exchange Theatre. There are also a series of museums and art galleries including MOSI, People's History Museum, Manchester Art Gallery and so on.

The area surrounding the Arndale, particularly in the Printworks is made up of a number of popular bars, cafes and restaurants, such as Wetherspoons, Yates, Wagamama and Nando's. Directly to the south of the Piccadilly station, there are numerous cafes, bars and restaurants run by national multiples.

Principal leisure destinations are also found around Exchange Square, including the Printworks which at the time of our survey was progressing through a refurbishment and enhancement scheme to deliver an improved leisure offer for the city centre. Furthermore, Exchange Square is surrounded by the Corn Exchange which provides a range of restaurants and bars, along with competitive commercial destinations such as Sixes Cricket, the Football Museum and a range of other food and drink facilities such as Oysters Bar. The area is further anchored by the AO Arena accessed through Victoria Station, providing an important facility for touring gigs and other attractions.

In addition to the above, key leisure areas are also focused around Ancoats and the Northern Quarter, which provide a range of principally independent bar, café and restaurant operators and supports the evening economy in particular. The area is dispersed by residential, office and other retail uses and is an integral part of the offer of the city centre. Furthermore, the opening of Factory International at Aviva Studios in June 2023 (official opening is set for October 2023), which supports the arts and popular culture sector, helps to further support the offer within the north-western part of the city centre alongside the River Irwell.

The number of retail service operators is considered appropriate to the serve the needs of Manchester city centre. There are a total of 42 individual retail service units within the centre, accounting for approximately 6,310 sq.m of floorspace, or 1.0% of total floorspace in the centre. This figure is below the national average figure of retail service floorspace but is reflective of a centre of this scale, which focuses more on its retail and leisure offer. There are number of hairdressers and beauty salons, alongside travel agents such as TUI, and other services such as Specsavers. Retail service operators are found throughout the city centre and serve the catchment well.

Financial and business services account for approximately 18,920 sq.m of floorspace or 3.9% of total floorspace in the centre. The provision of financial and business uses falls below the national averages in terms of both the proportion of floorspace and units. However, the offer is considered to serve the requirements of the residents through the provision of banks, estate agents and other business services. A number of banks are located at St Anne’s Square.

Daytime/Evening Economy Manchester city centre has a strong comparison goods and leisure service offer, focused around both a strong daytime and evening economic offer. This is augmented by a strong office market, which underpins activity particularly during daytime hours. As such, the city centre remains open throughout the day and evening, encouraging activity throughout.

The daytime economic offer in the City is robust, and is primarily focused around the key comparison operators, especially around the Arndale and Printworks, but also on key secondary retail streets throughout the rest of the city centre. This offer is supported by a strong food and drink offer, which (during daytime hours) is primarily focused on cafés and restaurants. These operators act to drive and support footfall during the day. Accordingly, the centre is considered to have a strong and diverse daytime economy offer.

Creating a safe, vibrant and well-balanced evening and night-time offer is a challenge that can dramatically improve the overall health of a town centre and boost the economy. The evening economy offer is robust, and is primarily focused around the city centre's strong leisure service market.

The range of leisure and food and drink operators has grown considerably nationwide in recent years, and is now an integral part of the offer of Manchester city centre. The resurgence of town centre leisure operators, which has resulted in new cinemas being developed close to the shopping core and 'competitive socialising' concepts, which include bowling, crazy golf, table tennis, axe-throwing and other seemingly niche pursuits, has been particularly notable. The leisure service sector accounts for the greatest proportion of floorspace in the city centre, and is diverse including both restaurants and food outlets, as well as bars, cafes and restaurants and theatres and cinemas.

Other operators, including nightclubs, remain prevalent in the city centre, and form a key integral part of the City's evening economic offer. Such operators, as well as theatres and cinemas, are considered likely to draw from a relatively large catchment area and to draw a fairly substantial proportion of footfall into Manchester.

The importance of visits to pubs, bars and cafés to the city centre is clear insofar as the city centre is the most visited destination in the study area, and secures 23.4% of all restaurant visits from across the whole Study Area and 28.7% of all pubs, bars and nightclub visits.

The hotel offer within the city centre further supports both the daytime and evening economies, and it is key that the offer also covers the spectrum of the market, from the budget end through to the very high end. Hotel stays in the city centre encourages additional spending and increases the available expenditure ready to support businesses throughout the city centre, and further afield.

Vacancies

At the time of our visit there were 337 vacant units noted throughout Manchester city centre. These units account for approximately 92,2770 sq.m of floorspace. This figure amounts to 15.2% of total retail floorspace within the centre.

This figure is higher than the current national average figure for vacant floorspace, at 13.8%. In terms of the proportion of units, the 16.7% of units identified as being vacant in the city centre is higher than the national average of 13.8%.

The higher than average figures for vacant units and floorspace represents some cause for concern but is considered to be broadly comparable to other large city centres across the country. The vacant units vary in terms of location and size, and the total includes some of the larger units in the centre.

In this regard, the largest vacant unit identified in the centre at the time of the Nexus survey is the former Debenhams unit on the corner of Market Street and High Street, which extends to approximately 32.820 sq.m. Recent announcements made by the CD9 Properties Ltd confirm that plans are underway to repurpose the unit. Indeed, a planning application (ref: 127882/LO/2020) was approved on 26 January 2021, and provides for the conversion of the former Debenhams Store to retail and leisure space at ground floor / basement levels, and, the introduction of high quality Grade A workspace to the upper floors, including a four storey roof-top extension for office use. Subsequent discharge of condition applications have been made, indicating that the scheme will be coming forward.

Although there were a few vacancies noted within the Arndale Centre, these were less pronounced than those throughout the rest of the centre. The success of the shopping centre and its attractiveness for national multiples has clearly had an impact on the remaining primary frontages in the city, with some operators having relocated from more peripheral areas to the modern facilities. There have also been a series of new operators occupying units within the Arndale, indicating a positive sign of churn.

Other vacancies are spread across the city centre, although there are a lesser proportion within these shopping centres, and higher proportions around the Ancoats area.

It was encouraging to note that at the time of our visit a number of units were noted as being under alteration or are in the process of being refurbished. These units were located throughout the city centre and indicates positive improvements in the centre.

The vacancy rates do present some cause for concern, particularly in areas of the city centre where vacant units are concentrated. Therefore ongoing monitoring should occur to the vacancy rates.

Opportunity Sites

The City Centre Strategic Plan, adopted in 2016, has been instrumental in guiding the city's transformation, setting out a comprehensive vision for the city's future and identifying key interventions and actions to achieve it. The strategy recognizes the importance of a diverse retail and leisure offer, as well as the need to create a high-quality public realm that enhances the city's attractiveness and liveability.

The city has already seen significant progress in implementing the strategy, with major projects such as the redevelopment of St. Peter's Square, the expansion of Manchester Arndale, and the creation of new cultural spaces such as the Manchester International Festival site and Aviva Studios (Factory) arts venue. These projects have helped to create a modern and dynamic city centre, with world-class amenities that cater to a wide range of interests and tastes.

Other important schemes such as Kampus, which has emerged following the consolidation of Manchester Metropolitan University faculties, and has seen the creation of a new neighbourhood comprising a mix of residential, leisure and retail uses, have had significant positive impacts on key areas of the city centre.

Looking ahead, the City Centre Strategy continues to guide Manchester's growth, with plans to further diversify the retail and leisure offer and create new public spaces that enhance the city's character and appeal. Major projects currently underway include the redevelopment of the Northern Quarter and the creation of new green spaces such as the Mayfield Park project.

Elsewhere, the Strategy emphasises the need to diversify the offer to create a rounded destination with leisure, family entertainment, food and beverage and enhanced retail markets alongside improvements in the public realm. Key interventions in specific areas include:

- Mayfield - A mixed-use development that will include residential, commercial, cultural, and leisure facilities, as well as new public spaces and improved transport links. The development will also aim to create new job opportunities and stimulate economic growth in the area. Escape to Freight Island and Mayfield Park have both had significant positive effects on this part of the city centre and there are substantial opportunities to further enhance the area through the future plans.

- First Street - The First Street Development project is designed to create a dynamic new neighbourhood, with a mix of office, retail, residential, and leisure spaces. The development already features a number of key buildings, including One First Street, Two Four and Seven, and the INNSIDE Hotel. These buildings provide modern, flexible workspace for a range of businesses, as well as high-quality residential accommodation and a range of retail and leisure facilities. Future phases of the scheme will bring forward additional office and residential developments, alongside further commercial provision and will again increase footfall and activity in the area.

- NOMA - Situated to the north of Manchester city centre, between the areas of Victoria and Angel Meadows, and bounded by Corporation Street to the south, Rochdale Road to the north, and the Manchester inner ring road to the east. The NOMA development includes a range of buildings and public spaces, many of which are being redeveloped or refurbished as part of the regeneration project. It includes a range of new developments, such as the One Angel Square building, which is home to Co-op's new headquarters, and the nearby 125 Deansgate building, which is being developed as a new office space.

- St John’s - The redevelopment of the former Granada Studios into a new retail and leisure destination that will complement the existing city centre retail offer. The retail opportunities at the Granada Studios site are expected to include a mix of high-quality shops, restaurants, cafes, and bars, as well as cultural and leisure facilities such as cinemas, galleries, and performance spaces. Also, the redevelopment of the former Bauer Millett car showroom site includes plans for ground floor retail units that will provide a range of shopping and dining options for residents and visitors.

- Piccadilly – An area focused on both retail and leisure uses, surrounded by important office uses, there is an importance of supporting the night-time economy, but also ensuring that the area is safe. Recent plans to regenerate Piccadilly Gardens will significantly enhance the area, and help to reduce the poor perception of safety and high crime rates in this part of the City. The area is a busy part of the city centre and its potential to increase dwell times and attract visitors will further support the vitality and viability of the City moving forward.

- In addition, the city centre is set to benefit from the following planned and ongoing schemes:

- ID Manchester – This project is a joint venture between the University of Manchester and Bruntwood SciTech, working in close collaboration with the City Council, which seeks to create a world-class innovation district on the university’s former North Campus in Central Manchester. The completed development will create over 10,000 new jobs – with the core specialisms being centred around advanced materials, health innovation, digital technology and biotech – and deliver education, apprenticeship and training opportunities. It will also encompass over 1,500 new homes; retail, leisure, office and innovation spaces; a new civic square and nature-led public spaces; and bring historical buildings back to life. Public consultation on a draft Strategic Regeneration Framework (SRF) for the area was held between July and September 2023, and future consultations are expected relating to the specific buildings and spaces that comprise ID Manchester when applications for planning permission are submitted.

- St. Mary's Parsonage – The St. Mary’s Parsonage SRF, adopted by the City Council in August 2020, relates to an area in the city centre bounded by Blackfriars Street, Bridge Street, Deansgate and the River Irwell. The SRF was prepared through collaboration between the Council and the owners of various landholdings within the area seeking to progress specific development proposals. The overall aim of the SRF is to regenerate the St. Mary’s Parsonage area in a coordinated way, establishing a commercially-led mixed-use neighbourhood that is a clearly definable and cohesive part of the city centre. The regeneration zone has benefitted from a number of important approvals since the adoption of the SRF, including:

    - the construction of a new 14-storey office building and refurbishment of existing buildings to provide workspace and commercial space for Property Alliance Group (under LPA refs: 135028/FO/2022 and 135029/LO/2022);
    - the demolition of the existing Alberton House and the redevelopment of the site by Bruntwood for a 19-storey office building incorporating ancillary amenity and food & drink space and a wellness centre (ref: 134287/FO/2022);
    - Investec’s redevelopment of the Kendal Milne and Fraser buildings for a mix of uses including offices, retail, leisure and public space (under LPA refs: 129251/FO/2021 and 129252/LO/2021); and
    - Oval Real Estate’s scheme involving the demolition of Albert Bridge House and the creation of a new 45-storey residential tower (367 homes) and a 19-storey office block, both with ancillary ground floor retail and commercial space, and 1.2 acres of outdoor amenity space (the Council’s Planning and Highways Committee confirmed at its meeting at 1st June 2023 that it is minded to approve the plans, under ref: 135834/FO/2022, subject the signing of a Section 106 Agreement).

- Enterprise City – An integral element of the plans for the St John’s regeneration area described above is the creation of a new cluster of tech-focused workspaces known as Enterprise City. The first of the project’s two phases is already underway, aided by a £17.5m grant from the Government’s Levelling Up fund, and involves the delivery of new workspace through the construction and refurbishment of ABC, Manchester Goods Yard, Globe and Simpson and the Granada HQ buildings. In addition, the Bonded Warehouse has already opened as an enterprise hub for SME businesses, including a Tech Hub. Phase two will see the creation of new tech clusters and a bespoke campus. Overall, Enterprise City has the potential to accommodate some 17,000 jobs in businesses from new start-ups to corporates.

- Strangeways – Manchester City and Salford Councils are working jointly to transform the largely industrial Strangeways and Cambridge areas at the edge of the city centre in order to deliver significant employment opportunities, alongside a range of other uses including new homes and commercial space – supporting existing businesses to grow and prosper, while providing space for new business to invest in the area. The Councils expect to appoint a team by Autumn 2023 to draw up an SRF to guide investment in the regeneration zone over the next two decades. Manchester City Council has commenced discussions with the Ministry of Justice relating to the possible relocation of the existing HMP Manchester, which would free up a large parcel of land off Great Ducie Street to be redeveloped as a new commercial district. Notwithstanding, the SRF is to be drawn up on the basis that the prison remains in situ, with a view to updating the proposals in response to any future decision made by the Ministry.

Other prime opportunity sites include the plans to redevelop and repurpose the Great Northern Warehouse, which will bring forward significant new office and residential floorspace, and the redevelopment of the former Central Retail Park (located just outside of the Goad plan) guided by the March 2023 SRF for a new office district.

The number of regeneration opportunity sites across the City and the positive signs of both public and private sector investment, means that there are substantial positive indicators for the future of the city centre.

Market Summary

With reference to CoStar data sourced in September 2023, the average annual market rent per sq.ft currently achieved in Manchester city centre is £25.46, with this figure representing a 6.3% increase on the £23.94 per sq.ft average achieved in the previous 12-month period.

The average market sale price per sq.ft has remained static over the past 12-month period, at £203 per sq.ft. However, CoStar forecasts that market sale prices will rise in future, reaching just under £220 per sq.ft by 2028.

In respect of yields, CoStar find that the current market yield is 7.0%, with this figure also not changing in the previous 12-month period. The market yield in the city centre is forecast to fluctuate slightly between 7.0% and 7.2% over the next five years, but remaining under 7.1% at 2028.

Increases in rents and decreases in yields are generally considered positive signs in respect of investor confidence in a given location. Manchester’s performance in these areas has been and is forecast to be consistently strong, a sign that investor confidence in the city centre is high.

In respect of the probability of leasing vacant premises, 50% of premises can be anticipated to be leased after around 7.6 months on the market, with approximately 80% of premises being let within 18 months.

Pedestrian Flows

A considerable amount of pedestrian activity was observed throughout all areas of the city centre at different parts of the day and evening. During the day, activity was generally strongest towards the Arndale and Market Street, Piccadilly Gardens, Piccadilly Station and Spinningfields.

In General pedestrian activity becomes lighter towards the South-west of Market Street, around St. John's Quarter and Castlefield. This is due to the transition from a concentration of retail and leisure centres to more high rise offices and apartment complexes most of which are under construction.

The pedestrianised nature of the main retail areas in the city centre provide a pedestrian friendly environment, which accommodates relatively easy, straightforward pedestrian movement.

There are a lower proportion of trips made to the Gay Village and Canal Street in particular during the day (in the week), although there are a range of restaurants and bars located by the canal, which are particularly attractive in the summer months. At the time of our visit, there was not much activity observed in China Town.

As different areas of the city centre perform relatively different functions - for example, Spinningfields is predominantly made up of commercial office premises, whilst Market Street, Deansgate and the Northern Quarter are largely made up of retail and leisure retail operators - there are a number of trips made in the centre that aren't linked to visiting other areas of the centre.

However, by virtue of the permeability and central location of major destinations such as the Arndale Centre and Piccadilly Gardens, a number of joint trips are, and easily can, be made in the centre of Manchester. This is particularly the case for office workers who frequent retail and leisure facilities during their lunch hours and after work hours.

The high number of pedestrianised areas around the centre and predominantly high quality public realm, both mean that there is a high level of vibrancy throughout the centre throughout the day.

As noted above and further detailed below, the volume of passing traffic through areas of the city centre and particularly peripheral areas does reduce the overall ease of pedestrian movement and the connectivity between areas of the city centre. However, it is considered that pedestrian accessibility is generally of a high standard by virtue of a number of controlled pedestrian crossing points located along busier roads and large pedestrianised areas within the major shopping areas in the centre. Furthermore, the authority and stakeholders are implementing a range of improvements to help permeability and reduce traffic in the city centre, particularly through improvements to pedestrian and cycle links through the Northern Quarter down to Victoria, within Ancoats and along Deansgate. This will enhance the east of pedestrian accessibility and create safer environments within the centre.

Accessibility

Manchester city centre is considered to have a high standard of accessibility by public transport and for pedestrians, cyclists and motor vehicles.

There are large pedestrianised areas located throughout the city centre, namely along Market Street, St Peter's Square, Canal Street and King Street. These areas, as well as pedestrian shopping environments such as Market Street, Exchange Square and other shopping centres in the city centre provide a safe pedestrian environment, which is considered to be highly accessible. Sizeable pedestrian footpaths, such as those along Deansgate and Mosely Street also provide safe pedestrian environments. As set out above, the Council and other stakeholders are also introducing new schemes within the centre to further enhance pedestrian accessibility, through the improvement to pedestrian paths and the reduction in vehicular movement.

Manchester is well integrated into the national train network, with Piccadilly, Oxford Road, Deansgate and Victoria stations being situated in the city centre. From these stations, frequent services are provided to a range of destinations throughout the City, the wider Region and nationally. The city centre is therefore considered to be highly accessible by train, having been developed so that key facilities are well-integrated to these stations.

In respect of accessibility by private vehicle, whilst the centre is somewhat challenging to drive into by car (largely by design, in order to improve accessibility for pedestrians and public transport, and to discourage individuals to drive into the city centre), the centre is considered accessible. There are a significant number of car parks located throughout the city centre, many around Shudehill and the Arndale, along with other multi-storey and level car parks across the remainder of the City.

The centre is also served by the Metrolink tram network, with a number of stops provided throughout the centre. The tram network links the city centre with the wider Greater Manchester suburbs, along with the Airport, the Trafford Centre and key leisure and sporting facilities such as the football stadia, the Old Trafford Cricket Ground and the new Co-op Arena (when opened). Tram services run throughout the day and evening at regular intervals.

Turning to the bus network, the city centre is very well linked via a range of bus services from across the wider authority area and further afield. Piccadilly Gardens provides an important interchange for bus services, and is usefully situated adjacent to the tram stop, providing opportunities for onward travel, including through to the railways stations in the city centre.

Shudehill Interchange provides a formal interchange for coaches travelling from across the country, and local bus services stop at a variety of bus stops throughout the city centre, including at stops outside the Arndale, Piccadilly Station, Victoria Station. Buses run regularly throughout the day and evening, both during the week and at weekends.

Within the in street survey, a total of 84.5% of respondents stated that they'd travelled to the city centre by modes other than private vehicle, again demonstrating the ease of access by public transport and the general encouragement to do so through the high quality public transport network and ease of access by the local walk-in catchment.

In general, Manchester city centre is accessible to pedestrians, with significant provision of pedestrianised areas throughout the centre. Public transport is also readily available, providing connections at various points in the city centre to destinations throughout Manchester and beyond.

Perception of Safety

Due to the relative size of Manchester city centre, the perception of crime varies somewhat throughout the centre. Notwithstanding this, the centre was generally perceived as being safe and secure at the time of our visit but there are areas which feel less safe, principally due to few active ground floor uses, narrower streets and less activity overall.

The main retail areas in the city centre, such as those at Market Street, along Spinningfields, Deansgate, St Peter's Square, and other principal streets, are considered to have few opportunities in which a crime could be committed. By virtue of the relatively high levels of footfall and activity in this location as well as the proportion of active ground floor uses, the streets provide a high standard of both natural and passive surveillance. This assists with deterring crime. These areas also have a high provision of street lighting and visible CCTV, which act to ensure security and safety is achieved at all times.

In more peripheral areas, the perception of safety deteriorates the further away from the main pedestrian routes you move. This is the result of a reduction in the level of pedestrian activity, and thus the levels of natural and passive surveillance.

Ongoing concerns around the safety within Piccadilly Gardens and surrounding areas remain, and concerted efforts to improve the area from both a physical and aesthetic side but also a safety perspective are ongoing.

These areas would therefore benefit from an increase in footfall as a means to improve the standard of security and individual safety in these areas – removing vacant units and introducing more ground floor uses in these areas would be beneficial. There may be opportunities for some 'meanwhile' uses to encourage footfall. This would also have a beneficial 'knock-on' effect to the environmental quality.

Environmental Quality   The public realm in the city centre is generally of a high standard, and has benefited from considerable investment (in parts) in recent years. Notwithstanding this, there are parts of the city centre where the environmental quality is of a somewhat poorer standard.

Pedestrianised areas, such as Market Street, provide an attractive retail destination while the Printworks provides an attractive leisure destination. The Printworks has benefited from considerable investment in recent years which has positively impacted upon the appearance, character and general environment of the centre.

In February 2023, renovation work commenced in the Printworks and one of the significant features of this renovation is the installation of Europe's most extensive indoor digital ceiling. Additionally, a renewed 20-year commitment has been made to continue the Printworks' ongoing partnership with Vue, which operates 23 screens at the Printworks.

The St John's garden, located to the south-west of the city centre is an open public park, which provides attractive greenspace within the centre.

Mayfield Park is also a significant asset, representing the first public park in the city centre to open in over 100 years. The Mayfield parkland extends to 6.5 acres (2.6 hectares) and encompasses 142 trees, 120,000 shrubs and plants, and a children's' play zone with six slides. Construction of the park involved uncovering part of the River Medlock which had flown underground for half a century, unlocking over 5,000 sq.m of new riverside habitat which now supports local wildlife and biodiversity. The Mayfield Park scheme has transformed a previously derelict part of the city centre and, as outlined above under the heading 'Opportunity Sites', will complement the forthcoming residential, commercial, retail and leisure development from which the area is set to benefit.

Located in the city centre area, St Ann's Square is a large open public space with water fountains, street furniture and other public realm interventions that make the area an attractive destination. The prominent early eighteenth century Baroque-style, St Ann's Church is located to the north of the square, with most of the retail, comparison and leisure units located to the south, east and west of the square.

The environmental quality in other parts of the city centre, such as Kings Street, is considered to be of a good standard. Kings Street is a part of the major retail parade that leads towards the Arndale shopping centre. The street is pedestrianised and includes a number of public realm features, such as street trees and benches.

Spinningfields features several independent and boutique restaurants that offer a unique dining experience, such as Australasia, and The Alchemist, which is known for its creative cocktails and lively atmosphere. The development also features a range of upscale bars and pubs and includes a number of spacious and well-maintained outdoor areas. The area around Hardman Square, for example, is largely pedestrianised, and features a range of seating areas, sculptures, and water features.

Most areas of the city centre appear well-maintained, with little litter or graffiti. There are some areas which are of a poorer quality, with lower quality operators and units.

Conclusions

Manchester city centre is a key national and regional centre, and is capable of drawing customers and visitors from an extensive catchment area. This role is further supported by the quantum of office space located throughout the city centre, which draws in further footfall.

The comparison and convenience retail offering is strong and diverse. Although the floorspace occupied by comparison and convenience operators is somewhat lower than the current national averages, in respect of convenience floorspace divergence can be readily explained by the strength of competing retail offerings throughout the wider city and for comparison floorspace this can be attributed to changes in the centre's offer and composition in recent years. The city centre offering includes a broad range of retailers, from national multiples to specialist and independent and regional operators.

Manchester city centre performs exceptionally well in terms of its leisure offer, benefitting from a large number and diverse range of operators which reflect its role as a major national and regional centre. Food and drink play a key role in attracting footfall and activity to the city centre and driving its evening economy. The greatest clusters of restaurants, bars and cafés are located within key areas such as Exchange Square, the Northern Quarter, Deansgate and Oxford Road.

The city centre also provides for an excellent variety of large-floorplate leisure uses including theatres, cinemas, museums, art galleries, and other entertainment facilities. The existing AO area is an important facility for touring gigs and other attractions which draws visitors from across the North West. The new Aviva Studios (Factory) venue will lend further support to the arts and popular culture sector, encouraging the development of new complementary uses in the north-western part of the city centre alongside the River Irwell.

However, the vacancy rate within the centre is currently above the national average in terms of both proportion of units and floorspace and represents some slight cause for concern. Vacant units in the city centre include the former Debenhams unit on the corner of Market Street. This is a significant, and high profile unit, and reflects the significant headwinds faced by the comparison goods sector in recent years. Although there were a few vacancies noted within the Arndale, these were less pronounced than those throughout the rest of the centre. Therefore ongoing monitoring should occur to the vacancy rates in the areas noted above.

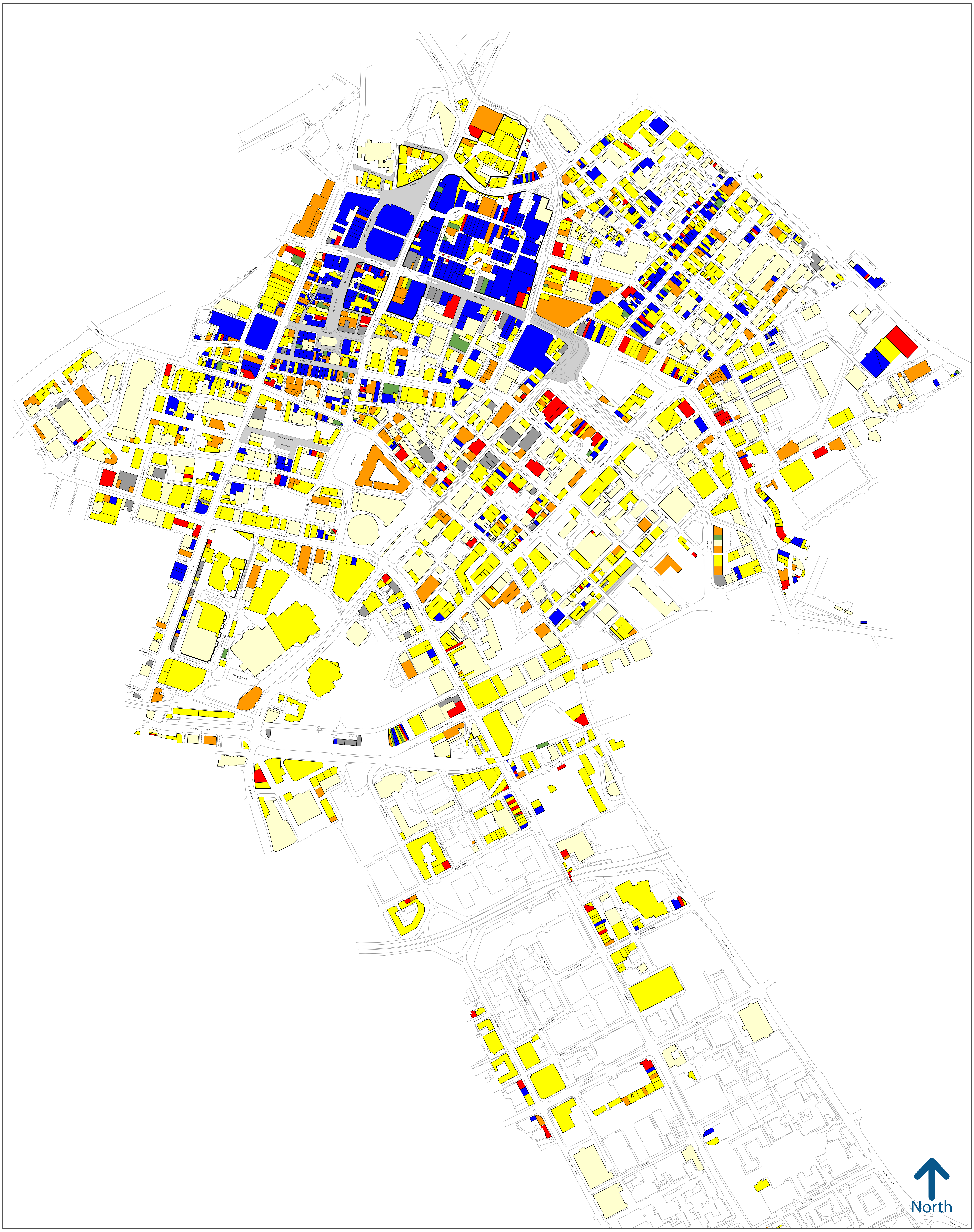
In general, Manchester city centre is accessible to pedestrians, with significant provision of pedestrianised areas throughout the centre. Public transport is also readily available, providing connections at various points in the city centre to areas throughout Manchester and beyond.

The city centre has been subject to considerable investment in recent years, and the effect of this has been to improve the overall appearance of Manchester city centre into a largely attractive centre whose diverse cultural offer is considered likely to drive footfall throughout the day and into the evening.

Although there are some areas of the city centre which suffer from lower footfall and a lower environmental quality and perception of safety, overall, the centre is considered to be attractive, well maintained and safe.

Overall, we consider the centre to be vital and viable, and with future investment and extant proposals being delivered, these will further support its health into the future.

Manchester Central



Experian Goad Plan Created: 17/08/2023
Created By: Nexus Planning Ltd