MANCHESTER STRATEGIC RETAIL STUDY
STAGE 1 REPORT

MANCHESTER CITY COUNCIL

MANCHESTER

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APPENDICES

1. INTRODUCTION

INSTRUCTION

1.1 CB Richard Ellis (formerly CB Hillier Parker at the time of instruction) were instructed by Manchester City Council in order to undertake a wide ranging and detailed Study of retailing across the Manchester City area.

1.2 This was to focus particularly on the 16 district centres within the city area, the local centres in the city area and an overview of the relationship to the city centre. We have been asked to carry out detailed surveys of each of the centres to establish the actual facilities that they offer and their role and function with the retail hierarchy in the city.

1.3 This is a unique Study which has not been carried out before, in that it combines not only the retail function of centres but also examines the wider range of facilities that they have to offer and subsequently assesses their inclusiveness in providing both public, private and retail facilities to the public.

BACKGROUND DOCUMENTATION

1.4 This report is a summary of detailed data collation and analysis. As such we have prepared many background files that may need referencing as necessary when reading this Stage 1 report. These files cover the following:

- Method File (including the brief and our approach to data collation);
- Data from a comprehensive On-Street Shopper Survey;
- District Centres Summary File;
- Local Centres Summary File;
- Individual District Centre Files (16 separate files).

1.5 In addition, in conjunction with New East Manchester Ltd, we have also carried out research regarding the future retail provision for the Miles Platting area. This includes analysis of existing provision and its quality. Again, a separate file has been prepared for Miles Platting in terms of data collation.

APPROACH TO THE STUDY

1.6 In this report we have summarised our approach to this Study, which by its nature is wide ranging and encompasses a significant amount of data. In this respect we have prepared a matrix to position each of the district centres (being a specific focus of the Study) in terms of their role and function for retail and social purposes. This matrix appears at the front of this Summary Report.

1.7 We have undertaken a staged approach to the data collation and the initial analysis. This has firstly involved the commissioning of On-Street Surveys at each of the 16 district centres in order to gauge perceptions from shoppers about the centres and to obtain significant amounts of data.

1.8 We have also collated data from other sources where this is available. For example, certain centres have Goad Reports and Maps. Manchester City Council has data on the centres in terms of potential gross floor space and we have undertaken to list every single unit in each centre for onward analysis.

1.9 From all of the data collation we have brought together key summary pro formas for each of the district centres and a comparison chart for the local centres. This has enabled us to put together a succinct summary of the position of each of these centres from this data that has been collated. However, other information has also been put together to determine where there may be deficiencies in particular with regard to convenience shopping and comparison shopping (see below).

DEFICIENCIES IN RETAILING

1.10 We have utilised GIS Mapping Technique to consider whether or not there are areas of potential deficiency in terms of centre provision and food retailing. In addition we have used our National Survey on Shopping Patterns to determine the market penetration of various main store/centre locations and to analyse where there may be opportunities to improve provision accordingly.

1.11 We have therefore produced a Map File to help bring forward this analysis and this crosses over with the analysis of the data collated for each of the district centres accordingly.

1.12 We have also had to look wider afield from the specific district/local centre area to determine the potential for more food/non food retailing and this has been done accordingly.

1.13 With regard to the city centre we have provided a summary of how the city centre functions in retail terms as well as initial analysis of deficiencies in social/non retail provision. Again a separate city centre file has been prepared.

CONTENT OF THIS REPORT

1.14 From all of the above pieces of data collation and analysis we have attempted to bring forward initial conclusions on certain key matters. In the first instance we provide in Section 2 of this report a broad analysis of national trends on centres and retailing. The assessment of the function and role of the district centres across Manchester in relative terms and taking account of wider trends is provided in Section 3. We have also provided a summary with regard to the role and function of the local centres across the city.

1.15 Based on this analysis we have put forward our views on the hierarchy of centres that has evolved in the Manchester area taking account not only of their retail functions but also their non-retail /social functions. This is detailed in Section 4.

1.16 We have put forward our further views on the viability of centres, and specific issues affecting the future of centres in Section 5.

1.17 We follow this up with a summary of retail and non-retail facilities in the city centre, and its role overall, in Section 6. Section 7 of the report summarises our broad assessment of convenience retail provision in particular across the city area and indicates where there may be shortfalls in provision on a more qualitative based analysis. It is not the purpose this particular Study to undertake a detailed quantitative capacity assessment for food retailing in the city. We do however, see this as a stepping stone to further consideration of retail facilities in the future.

1.18 This is then followed by an analysis of the implications and issues arising out of this Stage 1 report in Section 8. This particularly focuses on the likely areas that require further analysis such as policy responses, hierarchy of centres and their definitions etc.

FURTHER WORK

1.19 This report is the first stage of a two-stage project as part of the work commissioned by Manchester City Council. The second stage is to prepare broad Action Plans for the 16 district centres and to look at broad policy responses in detail across the city area with regard to centres.

1.20 We will be considering the key issues facing each of the centres and the likely approach needed to address these issues. Some will be focussed only on environmental or management matters, other however will be much more centred on new development at varying scales.

2. OVERVIEW – NATIONAL TRENDS

2.1 Prior to considering the current situation with regard to district centres across the Manchester City area, we have provided some commentary on the trends that have been ongoing for the last few years regarding retailing shopping and their evolution.

2.2 National retail trends indicate a contraction in the number of shop units, a slow-down in the growth of non-food retail sales which has been very high until recently, and limited growth in the convenience food sector. More recently there has also been a slow down in the development of out of centre retail floorspace and a revival in town centres. However, this is not a uniform trend; there is a clear polarisation towards larger centres.

POLARISATION

2.3 This key trend of polarisation by comparison retailers towards larger centres is being reinforced by new development. According to CB Richard Ellis research, almost half the shopping centre floorspace in the pipeline is destined for the top 70 centres in the country, which will further enhance their market share. The concentration of activity in larger town and city centres has been at the expense of medium and smaller high streets and centres where development has not occurred, or it has been too small scale to increase significantly the range and quality of shopping. In particular Manchester City Centre has benefited significantly from the redevelopment of the retail core, placing the centre in the top 5 city centres in the country in retail terms.

NEW TECHNOLOGY

2.4 The advent of new technology such as internet or digital television home shopping is unlikely to have a universal effect. Certain sub-sectors are likely to be more affected than others; in particular the internet is attractive for retailing books, CDs, videos and high value electrical goods. Centres that offer a range of complementary, non-retail attractions and smaller centres, which offer a high level of convenient shopping facilities, are likely to be more resilient to these changes. Depending on their role and relative health, other smaller centres may be challenged by the growth of internet shopping, as one of a number of factors.

THE MULTIPLE RETAILERS

2.5 Significant changes are occurring in the traditional high street, as evidenced by closures, rationalisation and refurbishment. For example operators such as Arcadia whose high street fascias include Top Man, Burton, Dorothy Perkins, Evans, Top Shop, Miss Selfridges, Warehouse and Wallis are rationalising, reducing the number of outlets across the country. In recent years C&A has withdrawn entirely from the UK. Trading difficulties at Marks & Spencer led to a dramatic cutback in this retailer's development programme and a concentration on rebranding of products and focussing on the internal business. This has now shown a dramatic improvement in the firm's fortunes.

2.6 Whilst new retailers are also emerging, including the international fashion stores such as Mango and Zara, they are only seeking representation in large centres. Retailers such as The Gap, Next and H&M Hennes are all seeking increasingly larger stores to carry their full range of goods. Larger stores, often referred to in the retail industry as 'flagship stores' mean that retailers can maintain or increase their market share from a smaller number of stores in fewer centres.

DEPARTMENT STORES

2.7 Department stores have generally experienced a renaissance as the age profile of shoppers has changed to a younger audience. The top-end department stores such as Selfridges and Harvey Nichols are expanding into major regional cities. Mid-market chains such as Debenhams and the House of Fraser are undergoing progressive expansion and refurbishment whereas the smaller and independent chains and Co-operative stores are rationalising. Mergers/takeovers are also taking place such as Fenwicks' acquisition of Bentalls, and the ongoing takeover battle for Debenhams. This highlights the importance of continual evolution and investment, and even successful shopping centres will need to adapt to changing retailer needs and customer expectations.

THE DISCOUNT SECTOR

2.8 Many discount non-food retailers have recognised the benefits of serving smaller centres where the market size may not be as great as the larger centres, but space is considerably cheaper. These retailers often recognise the benefits of trading together (sometimes with discount foodstores) both in and out-of-centre. Retailers include Poundstretcher, WEW, Peacocks and Brunswick. These businesses often trade alongside multiple video hire businesses such as Choices.

RETAIL WAREHOUSES

2.9 Whilst there has been a slow down in out of centre floorspace development, where opportunities arise, there is continued pressure for large store formats. DIY retailers such as B&Q have expanded with their warehouse stores while others have merged, such as Focus Do-It-All. The increasing specialisation of retail formats even within one sector such as DIY is reflected in the proportion of non-retail trade sales varying significantly from Homebase which caters almost entirely for DIY enthusiasts while the proportion of trade sales is higher in both B&Q warehouse stores and Wickes.

2.10 New formats such as Woolworth's Big W have also emerged and others such Matalan have expanded aggressively. In large urban areas formats with a very selective representational requirement include IKEA and Decathlon who may draw trade from wide areas across local authority boundaries. In such circumstances, the sequential site assessment should cover the geographical area to which the need relates.

2.11 Another key feature of the wider retail warehouse market is that there are only a limited number of potential occupiers. This means that a balance needs to be struck between the provision of new floorspace and the implications of occupiers vacating outdated floorspace to move to new premises, which meet corporate requirements. Certain types of retailers, such as those selling electrical goods, now demand significantly larger units than 10 years ago.

2.12 Single unit, 'first generation' retail warehouses are generally not favoured by operators, which are seeking the benefits of joint attraction arising from retail warehouse parks. These are often located in industrial areas which may be less visible to passing trade. However, accessible industrial areas, which may lie adjacent to existing retail uses, are likely to continue to experience pressure for retail development. While retailers vacate outdated premises, it has proved important to determine the future of such space, including the potential to revert back to commercial uses or redevelopment for non-retail uses such as housing.

FOOD/GROCERY RETAILING

2.13 Food retailers are continuing to innovate and as part of the re-evaluation of high street shopping, new store formats are being conceived. However, the pressure for larger superstores and hypermarkets will continue, such as Tesco 'Extra' and Asda Wal-Mart, including pressure for the further expansion of out of centre foodstores, driven by consumer demand. This follows the significant expansion of Tesco and Sainsbury's floorspace by store extensions, especially over the last three years. The major next change however will be the result of the takeover bids for Safeway. This could lead to either the consolidation of the main food retail sector into 4 key players, or the rapid introduction of a new player. M&S have now begun to turn their attention to growing their food retail business especially in the city and suburban centres and could bid for some Safeway stores if the company is broken up. Conversely if Safeway is actively managed it may remain as a key retail operator. A decision on this is expected imminently.

2.14 Following the publication of the latest version of PPG6 in 1996, the major operators introduced small store formats including Tesco's 'Metro' and Sainsburys 'Central'. However, the development of these stores has generally been limited to larger metropolitan centres rather than district centres. This reflects that these stores serve a niche market in the convenience shopping sector, catering primarily for people working in the immediate area or visiting the centre for other purposes. As such, these formats tend to be less reliant on the resident population. However, in the Manchester area Tesco Metro has opened in Northenden and M&S Simply Food has opened in Didsbury.

2.15 The slow growth in expenditure on food and other convenience goods has meant that individual retailers have only been able to increase their market share at the expense of other chains or by merger. The only significant entrants in the last decade have been the continental discount retailers Lidl, Netto and Aldi. Their entry has been at the expense of Kwik Save. They can operate from a variety of locations including retail parks, as freestanding units outside of centres or within centres. However, they tend to have a common requirement for adjacent surface level parking. The relatively small size of units makes these retailers particularly suitable for district centres.

2.16 The grocery retailers have developed home shopping and electronic commerce initiatives. These vary according to the retailer and include sourcing from stores or dedicated depots, home delivery to customers who have previously visited the store, office deliveries, 'call and collect' and electronic home shopping. Tesco is the leading retailer in this initiative.

FOOD AND DRINK

2.17 In addition to retailing, there has been a dramatic increase in the number of ancillary food and drink uses in town centres. Coffee shops such as Starbucks, Costa Coffee, Coffee Republic and Caffe Nero have all expanded, as have chains of sandwich shops such as Pret a Manger. In shopping centres throughout the country, they are occupying an increasing proportion of floorspace as the benefits of these uses in encouraging longer shopping times is recognised.

2.18 Even in smaller centres where national multiple A3 businesses are unlikely to choose to be represented, A3 occupiers are accounting for an increasing proportion of floorspace. This can prove to be a valuable function where the supply of floorspace may reflect a historically more significant shopping function than is played at present. In centres where the supply of floorspace is restricted, pressure from A3 uses can lead to displacement of convenience and comparison retailers which often needs controlling.

PUBS/RESTAURANTS

2.19 A similar pattern of national chains is emerging in the pub/bar market. However, it has been found that the rollout of formats which are generally tested in the southeast do not always appeal in the regions. The expansion of formats such as 'All Bar One' and 'Pitcher and Piano' has been scaled down as a result of this characteristic.

FLOOR SPACE REQUIREMENTS

2.20 National multiple comparison retailers have very specific occupational requirements. These reflect their experience of operating effectively around the country and are generally only varied where the market is attractive and there is only a limited supply of suitable premises. The size of units required has tended to increase progressively, in part reflecting the trend of polarisation where a fewer number of larger stores can account for the same market share as a larger number of smaller stores. This trend is exaggerated in major cities where multiples often require large 'flagship' stores.

3. DISTRICT CENTRES – OVERVIEW

BROAD OVERVIEW

3.1 The Manchester City Council area has 16 District Centres and 23 Local Centres as defined in the Manchester Unitary Development Plan. We have mapped each of their locations in the main Plans File. However, the main plan is reproduced at Plan 1 in this report.

3.2 In broad terms each of the District centres lies along key routes out of the city centre and beyond. The exceptions to this are Chorlton and Sport City, which both lie on a key connecting routes around the city. Some of the Local Centres also lie along key routes, but many lie on secondary or local roads.

3.3 No empirical data has previously been available to make a detailed assessment of the status of each of these centres and their relative performance. Apart from the vitality and viability criteria outlined in PPG6. There is no national benchmark on how one can judge the quality of any given centre. Thus, prior to the production of this report, the only way of making informed judgements as to the current standing of the distinct centres in Manchester was to use a limited analysis such as this.

3.4 The detailed method of our approach to assessing each of the centres is included in a Method File. However, we have based all of our findings on detailed surveys undertaken specifically for this study as well as background documents made available to us.

3.5 We have attempted to provide a summary of the current role and function on each of the district centres. This is taken from the pro-forma sheets for each of the district centres, which are under separate files. The summary of their positions in terms of “retail provision” and “inclusiveness” is taken from a scoring process, which is included in Appendix 1.

Cheetham Hill

3.6 Key findings for Cheetham Hill are:

- The Tesco development will address the shortfall in convenience provision within the centre. Over one third of Cheetham Hill shoppers also visit alternative top-up centres for food shopping. However, the wider impact of this scheme over the medium to long term should be monitored closely.

- Safety and security is an area of concern, with particular worries including the presence of young people loitering, and evidence of anti-social behaviour. Street cleanliness and maintenance, and the range and quality of shops, are also identified as areas for improvement.
- The evening economy is poorly developed. The centre would benefit from the introduction of a wider range of higher quality private service and leisure facilities.

3.7 In overall terms, Cheetham Hill operates as a district centre. Pursuing the opportunities and improvements set out above is important in seeking to maintain and enhance this position. The weaknesses outlined above – including borderline commercial viability, poor representation of private services, and issues of crime – will serve to threaten its future vitality if measures are not taken, as shoppers already feel the centre has declined in recent years. The successful integration of Tesco into the centre is fundamental to its prospects, and should be monitored closely.

Chorlton

3.8 Key findings for Chorlton are:

- Chorlton is a significant main district centre. However, its boundaries, particularly to the south are very extensive and a more focused central area may need to be brought forwards. This should attract more people to it and keep them there for a more extended and enjoyable shopping trip.
- The Safeway store is not performing as strongly as one would expect for such a large centre and its location does not act as a strong anchor to the district centre. This must be reviewed and opportunities for a better main store location or in-situ improvements investigated.
- The evening economy may need encouragement and more encouragement and development, as its extent and quality is below average.

3.9 In overall terms, Chorlton is a large district centre, which is viable and vital but lacks a degree of focus in terms of its definition and integration of main food shopping.

Didsbury

3.10 Key findings for Didsbury are:

- There is an obvious lack of main food retailing in the centre. However the ability for a centre such as Didsbury to accommodate this is highly questionable given its compact nature.
- The lower amount of comparison outlets may need to be improved upon in order to maintain the diversity of Didsbury as a shopping location. This may need to be at the expense of not allowing the non-retail uses to expand much further.
- There are obvious parking problems associated with Didsbury. Again however, its compact nature means there is a limited opportunity to improve such facilities. In any event given that a good proportion of people arriving by public transport, a modal shift may continue to occur in any event.

3.11 Overall, Didsbury is a very strong retail centre but does not provide as broad a range of public service facilities as one would expect. It is a compact centre with additional opportunity to expand. It has a good quality environment already but evidently can always be improved upon particularly with regard to pedestrian friendliness on the street.

Fallowfield

3.12 Key findings fro Fallowfield are:

- There is a clear lack of strong public service provision in Fallowfield centre. This requirement needs to be addressed if possible.
- There are parking difficulties and concerns over traffic in the area. Consideration will need to be given to greater pedestrian safety around the centre and access throughout it.
- Although the evening economy is clearly highly developed there is a danger that this is not allowing for a wider choice of comparison retail outlets to come into the centre. Opportunities to provide quality units to attract multiple non-food retailers should be explored.

3.13 Overall, Fallowfield does perform as a district centre albeit it has a significantly lower number of units than average across the city area. It is strongly driven by the Sainsburys foodstore as a key anchor, and also by the evening economy. It is a strong centre but does suffer from a weakness of diversity and the environment and accessibility can be improved upon.

Gorton

3.14 Key findings for Gorton are:

- Gorton, as currently defined, is disjointed, comprising distinct elements both on and set back from Hyde Road, and around the junction of Wellington Street and Garratt Way. Concentrating the centre in a more coherent manner would help to create a clearer focus.
- The range of shops and services, and the quality of the market, are identified as areas for improvement. Safety and security is an area of some concern, with particular worries including the presence of young people loitering, and evidence of anti-social behaviour.
- The lack of a main food superstore needs addressing.
- The evening economy is poorly developed. The centre would benefit from the introduction of a wider range of higher quality private service and leisure facilities.

3.15 In overall terms, Gorton operates as a district centre but very poorly. Pursuing the opportunities and improvements set out above – particularly in terms of consolidating the centre to provide focus – is important in seeking to maintain and enhance this position. The weaknesses outlined above – including high vacancy rates, poor representation of private services, and a poor range of shops – will serve to threaten its future vitality if measures are not taken, as shoppers already feel the centre has declined markedly in recent years. Gorton benefits from the presence of a number of potential development sites, and the role of these should be examined closely.

Harpurhey

3.16 Key findings for Harpurhey area as follows:

- The planned redevelopment of Harpurhey, including a new market, more shops, and a new leisure centre will serve to sustain and enhance its status as a district centre. The wider impact of this scheme over the medium to long term should be monitored closely.
- Visitors to the centre would like to see a better range and greater number of shops. Safety and security is an area of some concern.
- The evening economy is poorly developed. The centre would benefit from the introduction of a wider range of higher quality private service and leisure facilities to complement the existing strength in public service provision.

3.17 In overall terms, Harpurhey operates as a district centre. The planned redevelopment is important in seeking to maintain and enhance this position, and address the perception amongst shoppers that the centre has deteriorated in recent years. This notwithstanding, the weaknesses outlined above are currently not a matter of great concern.

Hulme

3.18 Key findings for Hulme are:

- It is evident that Hulme could benefit from a further range of non-food shopping facilities to complement the facilities that are there. There is space available for a further unit.
- The ability for people to access the centre by public transport should potentially be considered for improvement.
- There are other non-retail facilities that may be suitable with shoppers particularly identifying the potential for crèche facilities in the centre.

3.19 Hulme is a new type of district centre following its development. It is heavily focussed on main food retailing and is proving to be a successful centre to the wider community as well as locally.

Levenshulme

3.20 Key findings for Levenshulme are as follows:

- The centre is very large compared to most district centres and very elongated. There are a number of vacant units running through the centre and it may be appropriate to consider whether the extent of the centre should be reappraised with perhaps two distinct focal points. There are a large number of very small premises which may require to be reconfigured for a larger units to attract further occupation.
- The potential for focal areas would also potentially increase the amount of dwell time for visitors to the centre which is lower than average.
- Consideration should also be given to increasing the range and quality of public services, which are below average at the current time.

3.21 Levenshulme operates as a district centre but is very large and lacks focus (similar to Chorlton in this respect). It functions well in many respects but also has a number of vacant outlets, which may need reconfiguring.

Longsight

3.22 Key findings for Longsight are:

- The centre is reliant on Asda for main food shopping. However, this does not connect well to the core of the centre and explains the perceived lack of parking available for the centre overall. The connectivity between this car park and the main centre needs to be explored further.
- Although there are significant areas of public sector provision the usage is lower than one would expect.
- There appears to be significant concerns over the overall quality of the environment around Longsight and this issue in particular could be considered further.
- It is understood that a site in the centre is to be developed for a discount food retailer. This will enhance the convenience retail provision for the centre overall and may assist in providing more improved car parking to the benefit of the centre overall.
- It is evident from observation that the market at Longsight is a successful and busy enterprise and is part of the retail attraction for Longsight.

3.23 Longsight clearly performs as a district centre and is highly attractive to visitors for non-food retailing. The centre is generally strong with a good range and mix of facilities. It is well served by public transport, however, the quality of the environment is poor and could be improved accordingly.

Newton Heath

3.24 Key findings fro Newton Heath are as follows:

- Newton Heath, as currently defined, is very disjointed, comprising distinct elements on both Oldham Road, and the main part of the centre on Old Church Street. Concentrating the centre on Old Church Street would help to create a clearer focus.
- The relationship with Oldham Road is reflected in traffic volume, congestion, and danger, and the lack of pedestrianisation, highlighted as areas of concern. Street cleanliness and maintenance, and landscaping and planting, are also identified as areas for improvement.
- The evening economy is poorly developed. The centre would benefit from the introduction of a wider range of higher quality private service and leisure facilities.

3.25 In overall terms, Newton Heath operates as a district centre. Pursuing the opportunities and improvements set out above – particularly in terms of consolidating the centre to provide focus – is important in seeking to maintain and enhance this position. The weaknesses outlined above – including fragile commercial viability, poor representation of private services, and traffic issues – will serve to threaten its future vitality if measures are not taken, as shoppers already feel the centre has declined in recent years. Newton Heath benefits from the presence of a number of potential development sites, and the role of these should be examined closely.

Northenden

3.26 Key findings for Northenden are:

- There is a low provision of public service facilities in the Northenden centre. This detracts from its overall inclusiveness. Additional public service facilities should therefore be considered.
- Overall spend is lower than expected and this could be improved by greater range and diversity of retail facilities. However, the surrounding area does not allow for large-scale improvements to be readily brought forward.
- There is evidence that there are problems with regard to access, car parking and public transport for the centre and this is a key area that should be addressed. Most parking is on small pockets of land, which is not easy to find. The narrowing of the main route leads to a perception of congestion as well.
- A further diversification of units for evening economy would also increase the vitality of the centre overall but the small size of the centre is likely to restrict the potential for such uses.

3.27 Northenden does operate as a district centre but with some limitations. There is no clear main food retail provision of a scale compared to other centres and is hampered by its access and traffic circulation.

Openshaw

3.28 Key findings for Openshaw are:

- Safety and security is an area of particular concern, with particular worries including the presence of young people loitering, and evidence of anti-social behaviour. Almost half of all respondents identified this as an area for improvement. Street cleanliness and maintenance was also identified as an area for improvement.

- The range and quality of shops in the centre is poor, and this is identified as a key concern and area for improvement amongst shoppers.

3.29 In overall terms, Openshaw operates as a district centre. However, compared with the other centres examined, its status as such is marginal. The weaknesses outlined above – including borderline commercial viability, a poor range and quality of shops, and issues of crime – will serve to threaten its vitality if measures are not taken, as shoppers already feel strongly that the centre has declined in recent years. At the detailed level, the centre lacks focus and definition. The post office is located outside the centre boundary, and it is served by a single bank. These factors suggest that important strategic decisions need to be made with regard to its future.

Rusholme

3.30 Key findings for Rusholme are:

- There is a clear lack of public service outlets for Rusholme. It may be the case that other facilities are located within the catchment area. However, the centre does not provide any focus for such facilities.
- The range and quality of comparison shopping is questionable and there is a low rate of customers visiting the centre for this purpose, as well as those using the convenience facilities
- The dominance of the evening economy may mean that additional retail units will be more difficult to attract into the area. Given its particular ethnic characteristics, comparison shopping of this nature may be the best fit.
- There are clear opportunities to consider the overall environment of Rusholme and particularly focusing on improving the quality of the streets and on the lack of a post office provision.

3.31 Rusholme can be considered as a district centre in terms of its size and diversity of offer. However, it is significantly biased towards the evening economy and there is no public service facility. It is difficult to see how the particular characteristics of the centre would dramatically change over time and its concentration on ethnic facilities is likely to continue.

Sport City

3.32 Key findings fro Sport City are:

- Shopper satisfaction with Sport City is high – over three quarters of survey respondents found nothing or very little to dislike about the centre. As a dominant food and non-food retail destination in this part of the city it appears to function well.
- This notwithstanding, its role as a district centre is distorted by a lack of choice, particularly in terms of the service offer. Services associated with a local centre – e.g. a hairdresser and post office – are absent, as are the *range* of facilities – e.g. catering and financial services – associated with a conventional district centre. The evening economy (with the exception of food shopping) is poorly developed. Some services are available in-store – e.g. pharmacy, optician, and Asda's own restaurant and takeaway counters. However, for a wider range of services (and indeed community facilities) local people need to look elsewhere.
- Relative to Manchester's other district centres, Sport City is currently dominated by car borne trade, and shoppers consider it to be an accessible centre. However, the scope to improve accessibility by foot and public transport should be examined.

3.33 In retail terms, Sport City operates as a district centre. Overall, in terms of social inclusion, it also performs relatively strongly from a retail point of view. However, this masks the fact that service provision, and the availability of wider community facilities is very poor. Pursuing opportunities to improve this position are important in ensuring that a broad range of day-to-day needs of local people can be met within their community. In this regard, Sport City's relationship with Beswick warrants further examination, in seeking to establish a more rounded provision in this part of Manchester. If this is not achieved, the model of a superstore operating as a district centre will not be fully realised.

Withington

3.34 Key findings for Withington are:

- The benefit of Withington is that it is highly accessible to a nearby population. However, it does not perform as well as a district centre as might be expected. There is no key anchor and this is reflected in its lack of attractiveness for main food shopping and non-food shopping. If there were an opportunity to provide a more focused main food facility, this would be of assistance to the centre.
- Safety and security of the centre for shoppers is a prime issue and requires significant improvements accordingly.

- Although there is more of an evening economy (34% visitation rate compared to an average of 31%) there may be an opportunity to expand such provision to assist with bringing vacant units into use. This would particularly the case for any units that are poorly configured. However, some are too small for quality non-food shopping operations.

3.35 Although Withington is a district centre, it is not performing well in retail terms compared to its overall size and diversity. It is more of a top-up type centre with low spend and low time spent in the centre for retail purposes. It is perceived as a less safe environment than other centres and these two elements in particular need to be addressed. The potential for broadening the evening economy to bring vacant units back into use may need to be brought forward.

Wythenshawe

3.36 Key findings for Wythenshawe are:

- It is evident that although Wythenshawe is a main district centre, it is somewhat lacking in terms of quality main food shopping and this is reflected by the lack of frequency of visits for such a purpose. Any opportunity for an improved main food shopping environment should be considered.
- There is a lack of diversity of outlets to cater for the evening economy and the centre is seen very much as a daytime only environment. A greater mix of use should therefore be considered.
- With changes to access to Wythenshawe with the new tram system, there may be opportunities to look at reconfiguring Wythenshawe centre to provide a more attractive environment for retailers, thus addressing concerns raised by shoppers over a lack of choice overall.
- The overall attraction of the centre should be improved in order to increase the dwell time of shoppers at the centre to provide a more varied environment. The opportunity to consider a more diverse and larger market should be further considered.

3.37 Overall, Wythenshawe is a mid range district centre with a heavy bias towards public service provision. It has the advantage of providing some well-configured retail outlets for national multiple comparison retailing but does not provide a high quality food retail offer for main food shopping. It is not as diverse as it could be in terms of a range and mix of uses and an extension to its attractiveness throughout the evening could be brought forward. There are further opportunities to improve the environment of the centre and this could be achieved through further reconfiguration of the centre overall.

LOCAL CENTRES – OVERVIEW

3.38 We have undertaken to survey each of the local centres across Manchester City Council area and have provided a summary sheet at Appendix 2.

3.39 The Local centres are in some instances performing well, but several are either acting as no more than small local parades or are in terminal decline. For example, Whalley Range has improved significantly as a local centre and is a strong location. On the other hand Claremont Road in Mosside is in a very poor state in terms of occupation and the environment.

3.40 We have compared each of the centres to the PPG6 definition of such centres to determine their standing in retail terms as well as considering their overall environment. This is commented on briefly in the Appendix.

3.41 We have not given a commentary in this report on each centre. Rather we propose to look at a broad action plan for consolidating and revising the local centres list as part of Stage 2 of this project.

4. RETAIL HIERARCHY

CURRENT POSITION IN UNITARY DEVELOPMENT PLAN

4.1 The Manchester City Plan acknowledges that there are 16 district centres across the city centre. Since the plan was adopted there have been two changes to this list of district centres, this being the deletion of Moss Side and its replacement by Hulme, and the creation of a new designated district centre at Sport City. In terms of retail hierarchy these are all grouped together as district centres overall with no distinction between them.

CENTRE HIERARCHY – RETAIL FUNCTION ONLY

4.2 We have provided a summary of our assessment of each of the district centres in order to grade them according to their function and role. This summary sheet is enclosed in Appendix 1. From this summary it is evident that the hierarchy of the centres in retail terms <u>only</u> is as follows:

1. Didsbury
2. Chorlton
3. Longsight
4. Sport City
5. Levenshulme
6. Northenden
7. Hulme
8. Wythenshawe
9. Fallowfield
10. Newton Heath
11. Harpurhey
12. Cheetham Hill
13. Rusholme
14. Gorton

15. Withington

16. Openshaw

4.3 This is based on a scoring process for the amount and type of facilities available on each centre and responses to the On-Street Shopper Survey.

4.4 Notable results are:

- Wythenshawe is not as high in the retail rankings given its number of facilities. The environment and quality of retail outlets and lack of strong market have helped to push it down.
- Sport City is much higher up the rankings than one may perceive, given that it is currently a single unit centre. However, the measurements on quality of environment, accessibility, safety and range of products (even though under one roof) has meant that it has scored very highly on the survey work we have carried out. Similarly Hulme has scored relatively well in retail terms for the same reasons as Sport City.
- Withington is placed much lower than one may expect, but barely attracts enough people for significant retail trips. It is evolving more with some evening economy and may ultimately benefit from this in the future.
- Harpurhey and Cheetham Hill do not currently score well in retail terms but may well change significantly once major redevelopment schemes have been completed.

CENTRE HIERARCHY – SERVICE/INCLUSION MEASURES

4.5 We have also considered each of the district centres in inclusion terms only and this also provides a certain type of hierarchy. This is again based on the centre audit and survey information. This is as follows:

1. Chorlton

2. Didsbury

3. Levenshulme

4. Sport City

5. Cheetham

6. Harpurhey

7. Withington

8. Newton Heath

9. Longsight
10. Wythenshawe
11. Gorton
12. Northenden
13. Rusholme
14. Hulme
15. Fallowfield
16. Openshaw

4.6 These rankings may appear to be different to expectation. However, we have been keen to ensure that "inclusiveness" is not only measured by non-retail facilities, but also how far reaching each centre is to its catchment in retail terms. This means that certain centres that score very well in this respect may outrank other centres which have a good range of non-retail facilities.

4.7 For example, Sport City scores higher than one may expect due to its wider retail role in the area and the attraction to all sectors of the community. Rusholme scores very poorly due to its bias on evening economy uses.

CENTRE RANKINGS – OVERALL HIERARCHY

4.8 On combining the above two rankings, we have been able to put together a list of how each centre performs overall in terms of retail and social functions. In this respect the ranking is as follows:

1. Chorlton
1. Didsbury
3. Levenshulme
4. Sport City
5. Longsight
6. Cheetham
6. Harpurhey
8. Northenden
8. Newton Heath
8. Wythenshawe
11. Withington
11. Hulme
13. Fallowfield

13. Gorton
15. Rusholme
16. Openshaw

4.9 On analysing this overall ranking, there are some important results that need further consideration.

- Sport City scores high in an overall ranking basis even though it is virtually a single unit centre. Its main weakness is a lack of public facilities but overall it scores very well in terms of its retail inclusiveness given its wide range of products even though they are under one roof. This suggests that new format district centres can achieve strong status in terms of public perception and use.
- There appears to be a very clear distinction as to the very top performing centres. The top 4 centres – Chorlton, Didsbury, Levenshulme, and Sport City – heavily outscore other centres and can be very much be viewed as the main large district centres for the city area.
- Fallowfield scores lower than one may expect but does not have a significant number of comparison retail units nor public service facilities.
- Evidently if one were to change some of the scoring basis then the rankings may slightly alter. For example if inclusiveness measures were only assessed on the amount of public service facilities then this would radically change the results. However, we believe that inclusiveness is not solely about such facilities. It is partly a judgement of how a centre performs in the round on all the measurements that we can provide.
- There is a significant variance in terms of retail facilities between centres where some are biased towards one sector of retailing such as convenience goods or to a large amount of comparison retailing.

INTER-RELATIONSHIPS BETWEEN CENTRES

4.10 It is evident from our survey work that there are certain relationships that have developed between certain centres. This is by no means a generic pattern but is worth commenting on.

4.11 There is a trend towards corridors of retail provision along the main routes out of Manchester City Centre. This leads to certain centres providing retailing and/or other services across a wider area and in place of other centres. These are highlighted below:

- Longsight/Levensulme – in this instance Longsight provides a main food retail and market function whereas Levenshulme has a number of discount outlets and a significant amount of comparison retailing;
- Withington/Fallowfield/Rusholme – in this corridor, Fallowfield is the key main food retail location with the Sainsbury superstore. Withington has a very limited retail function and Rusholme provides a significant amount of the evening economy.

INTER-RELATIONSHIPS WITH OTHER FACILITIES

4.12 In certain circumstances, certain centres are near to freestanding retail facilities that provide retail provision to that area. For example, there is a Tesco main food store at East Didsbury area which provides a main retailing focus for Didsbury overall. This is not however, part of the centre. The Tesco at Baguley may well attract more people from the Northenden area for main shopping as well. Further analysis on food retailing issues is provided in Section 7 of this report.

5. VIABILITY OF CENTRES – PERFORMANCE

5.1 When combining the role and function of each of the centres and the hierarchy produced for both retail and social inclusiveness, we can map out how each centre can be positioned for future policy responses.

5.2 Each centre clearly has certain weaknesses and strengths and the aim of policy responses and action plans is to move each of the centres towards improving both inclusiveness and retail facilities in the future.

5.3 In terms of trying to group centres into a relative health profile this is somewhat complex and difficult to achieve. Certainly however, there do appear to be three distinct levels of centres when considering their overall ranking as follows:

- Level 1 – Chorlton, Sport City, Levenshulme, Didsbury
- Level 2 – Cheetham Hill, Harpurhey, Longsight, Northenden, Wythenshawe, Newton Heath, Hulme
- Level 3 – Fallowfield, Withington, Gorton, Rusholme, Openshaw

5.4 In the broadest sense, these three levels can be considered respectively, as being good / stable; in need of some attention; and in need of urgent attention. However, this belies the nature of certain centres overall health and therefore cannot be simplified accordingly.

5.5 For example, there are specific concerns for many of the centres that do need further consideration and these are detailed below:

- Chorlton – under performance of main food shopping facilities;
- Sport City – lack of additional retail and public service facilities;
- Levenshulme – very long retail area with no defined centre;
- Didsbury – traffic congestion – narrow pedestrian routing;
- Hulme – lack of additional retail facilities;
- Cheetham – lack of main superstore (to be provided and monitoring of its success)
- Harpurhey – Monitoring of reconfiguration and its success
- Longsight – poor connection between main centre and car parking;
- Northenden – lack of public facilities and car parking;

- Newton Heath – poor environment; open areas, lack of definition
- Wythenshawe – poor environment – no evening economy – poor quality main food provision;
- Fallowfield – lack of comparison outlet;
- Withington – poor main food provision
- Gorton – poor environment – lack of focus and facility;
- Rusholme – high level of evening economy as opposed to retail function;
- Openshaw – poor environment, lack of quality retail facilities, lack of public facilities

5.6 Evidently if certain areas of centres were focused upon then this would change their ranking accordingly. For example, Cheetham Hill, with the provision of a new Tesco food superstore, and Harpurhey, with its reconfiguration of facilities, will improve their standing and may influence their positions in the retail hierarchy and overall centre hierarchy accordingly.

5.7 It is clear however, that there are particular centres that are of specific concern and in particular these include Gorton and Openshaw. In our view there are significant concerns over their ongoing role as district centres unless there is a radical change to their positioning in the retail hierarchy. If a significant investment can be achieved in either or both of these centres to enable them to continue as district centre level facilities then this will clearly need urgent consideration. However, an alternative may be a downgrading in their centre hierarchy, and in each case the options need to be reviewed fully in the Action Plans.

6. MANCHESTER CITY CENTRE

RETAILING

6.1 Manchester has a very large catchment population of 6.83m people of which 1.63m represent its core catchment (70% of regular non food customers). Both figures rank Manchester as second only to London's West End. However the regular shopping population or current market size of Manchester, at 731,000 people, ranks Manchester 4th behind both Glasgow and Birmingham. In fact the penetration into the catchment at 11% is the lowest of any of the Top 10 cities reviewed in this report. What it clearly demonstrates is that Manchester, perhaps alone, has the population potential to increase its catchment penetration and therefore its current market size.

6.2 Manchester is dominant within its catchment but has 16 centres as competition, which account for 42% of its catchment population. Of these centres only Bolton, Liverpool, Hanley, and Preston muster 4% and none of these are in Manchester's core catchment. Only the Trafford Centre at 3% is significant within the core catchment.

6.3 The market size of the Trafford Centre is 39% of the size of Manchester based on 2000 survey data. It is only the 7th largest retail attraction in the North West. However by maturity next year it is anticipated that it will have risen to 4th largest. The overlap area between the two catchments is a key battleground. The area is an important source of trade to both, accounting for 61% of Manchester's market and 70% of Trafford's. Manchester achieves a 32% penetration rate in this area compared with 14% for Trafford. At maturity assuming no change to Manchester, Trafford is expected to increase to 16%. It is however important to remember that the core customer profiles of Trafford and Manchester are very different and this is borne out by Selfridges experience since opening in the City Centre.

6.4 On comparing Manchester with the other major provincial regional cities (Birmingham, Glasgow, Leeds Newcastle and Nottingham as primary comparables plus Cardiff Liverpool and Edinburgh as secondary comparables) at a variety of levels, we have found that:-

- The catchment population of 6.83m compares with an average of 3.98m amongst the primary comparables– 72% higher.
- 16% of the core catchment are AB's; 40% ABC1's – both slightly above the primary average.

- In volume terms Manchester has 650,000 ABC1's nearly double the average of the primary comparables.
- The annual available spending power within the core catchment is £3.5bn of which £990m is spent on clothing and footwear. Primary averages are £1.8bn and £532m. respectively.
- Although ranked 2nd in catchment size, Manchester ranks below Glasgow in most retail and vitality rankings.
- After Birmingham, Manchester has more retail floorspace coming on stream in the next five years than the other cities.
- Similarly Manchester will be second to Birmingham in terms of department store floorspace in provincial cities
- As a city offering a range and variety of branded fashion retailers, Manchester ranks highly but not as high as could be expected given the size of the catchment.

6.5 The conclusion drawn is that Manchester is dominant, will remain so and when compared with its peers has significantly more people and greater spending power. The new floorspace coming on stream will absorb additional spending but there is still scope for widening Manchester's retail mix and attraction given the capacity that exists.

6.6 At a micro level Manchester City Centre has a compact retail core but the city centre is a large area divided into eleven districts all of which have experienced significant regeneration activity or are about to.

6.7 The Millennium Quarter has significant stand-alone attractions such as the Cathedral; the Urbis Centre and new retail/leisure schemes The Triangle and The Printworks. Both these schemes have had mixed levels of success at the startsand whilst their location (effectively on the northern edge of the retail and commercial core) will ensure success there is some work to be done to achieve the optimal mix and function for the city centre as a whole.

6.8 At the other end of Deansgate the Great Northern has failed and a major relaunch for a different concept is only a matter of time. Despite its location adjacent to the highly successful conference facilities and the nightlife of Castlefield, retailers were not convinced of the location and bars/restaurants generally prefer street presence to internal locations.

6.9 The Conference Quarter as a whole will thrive – hotel development has been intensive and the quality restaurant market has expanded.

6.10 Piccadilly Gateway has long term mixed use redevelopment opportunities but Piccadilly Gardens is important. The creation of an attractive public space formed by impressive new buildings will go some way to help the eastern end of Market Street and Debenhams in particular.

6.11 The Retail and Commercial core has undergone significant change since 1996 and it will remain in a state of evolution until the end of this decade. The area is now defined and limited to the north and east by the tram system. Expansion and consolidation is underway to the northwest and further opportunities exist to the west and south. However the developments that have and are taking place will have their effect on retailing patterns.

6.12 In our view Market Street will remain prime in terms of rental values and provided the Arndale redevelopment creates a successful circuit to link both ends of the street, will continue to provide the majority of mid market shopping offer. The second anchor at the north-eastern end is crucial. Debenhams face challenges from the effect of the tram on pedestrian flow, the change from Lewis's to Primark and the new concentration of retailing at the western end. There is scope for a further department store in Manchester – most major cities could accommodate four, although there may be a further store developed at the Trafford Centre at some point.

6.13 New Cathedral Street is a completely new pitch. Its great advantage is that it is new clean, modern space and links the traditional quality shopping area with the new quality area. It has let to a good mix of retailers who, but for the bomb, would have struggled to get decent space in King Street or St Ann's Square. Whilst there is limited access to significant car parking the area defined by Exchange Square, New Cathedral Street, Marks & Spencer and Selfridges will be 'shopping in Manchester' for some.

6.14 This possesses some challenges for King Street. There are retailers leaving for the new pitches and there are retailers putting their units on the market as trade suffers. The area has lost its buzz and rents are falling. How the area including St Ann's Square recovers and repositions itself in the next two to three years will be very important to the City. St Ann's Square has deteriorated but is sufficiently close to benefit from the new pitch created.

6.15 Kendals are likely to have problems with the new competition but can be part of the solution as can Deansgate. House of Fraser have sanctioned a major refurbishment there, and the customer profile is very loyal and King Street needs to remain an important part of that market. Deansgate is currently extremely congested and serving little retail function but it is the major thoroughfare linking the city together and is part and parcel of the Manchester scene. If in the medium/long term proposals to reduce/eliminate traffic could be achieved (as witnessed in Leeds with Briggate) this would go a very long way to securing better integration and successful expansion of the retail and commercial core.

6.16 Our review of retailing in the city has highlighted how the middle/mass market is well catered for and will be expanding; how branded fashion for the younger market has expanded and how the high end and branded fashionwear remains strong. Each quarter area has evolved to find its niche and therefore successfully integrate into an overall diverse product for the city.

SOCIAL PROVISION

6.17 The City centre does not have the variety of social provision that one might expect from a city of this size. However, historically the centre has not been a key location for residential areas. The main impact on residential development was first felt in the 1980s with public sector housing in the Northern Quarter. Since then, following a slow start to private sector housing, the population has risen dramatically in the last decade from less than 1,000 to over 13,000. This means that there is increased pressure on the (few) public facilities in the city core and its quarters.

6.18 Our findings show that there are some large-scale facilities (such as the main library and key Council offices) but very few other service facilities such as doctors, dentist, nursery and no schooling. However, given the profile of the population in the city core we believe it is unlikely that schooling is an issue, but there may be increased pressure on nursery provision and other facilities. There will be a further nursery at Mackintosh Mills that may help, but further facilities would be welcome around the city centre.

6.19 In locational terms it is important that new areas and those set for future transformation are able to provide a full range of facilities from retail to service uses to meet the demands of the local population. In this respect Spinningfields, the Northern Quarter, Southern Gateway, and Piccadilly Gateway can all offer opportunities not only to provide local facilities but also facilities to the benefit of the city centre overall.

6.20 In convenience retailing terms the city lacks a main food store within its core area. The largest facility is the M&S food hall, followed by the Tesco Metro on Market Street. These do not offer a full range of facilities for the core population and people have to travel out of the core to main store locations – notably Asda, Hulme and Sainsbury, Regent Centre. With the ever-increasing population we would expect a greater pressure for a large main store, or possibly a number of new small food stores, to come forwards. However, it will still need to attract a wider catchment to be sustainable in business terms and will therefore probably need to locate toward the edge of the city core area.

6.21 Overall the city centre is highly accessible to the majority of the catchment population, and in all forms of transport. This is set to increase with the future tram extensions to other parts of Greater Manchester which all link into the city core. It is therefore highly accessible to a very large population and hence generally a very inclusive city centre.

7. FURTHER CONVENIENCE PROVISION

7.1 As part of the overall Study, we have further assessed the potential for additional convenience retail provision throughout the Manchester area. This is based on all of the findings from the detailed assessment of each of the district and local centres as well as considering the range and distribution of retailing across the city's area overall.

7.2 We have considered how each of the centres performs, particularly in main retail terms with regard to their trade penetration and their geographic location. We have also had to consider how other main food retailing locations interact with the District Centres located beyond the Manchester City boundary or in free-standing locations.

7.3 This assessment is <u>not</u> a numerical based Retail Capacity Assessment to determine the amount of extra convenience floor space that should be provided. This is something that will need to be considered in more detail as appropriate either through specific studies or on a case-by-case basis.

7.4 We therefore have provided commentary on those areas which we believe require further consideration accordingly as follows::

INNER NORTH CITY/OLDHAM ROAD CORRIDOR

7.5 At present, there are no main convenience food outlets of any size that serve the north/north eastern part of the city centre and the Oldham Road corridor area. The nearest food store to the city centre lies to the south west and south (Sainsburys at the Regent Centre in Salford city area and the Asda at Hulme). The nearest main store on the east side of the city is the Sport City complex.

7.6 There are limitations to the Oldham Road corridor as further out there is a main food store being redeveloped by Morrisons at Failsworth. Similarly the northern half of the city is provided for by main retailing at Harpurhey and with the new development of a Tesco store at Cheetham Hill. Therefore the location of any additional facility will have to be carefully considered balancing the requirement for a strong commercial presence on main road frontage and the status of any new facility either being freestanding or connected to a district centre.

GORTON CORRIDOR

7.7 Gorton District Centre performs very poorly as a main food shopping location. Shoppers in the area tend to either go eastwards to the Ashton under Lyne area, westwards to

Sport City or to the Asda at Longsight. The ability for such provision to be met in-centre or along this corridor will need further investigation.

OPENSHAW

7.8 The sheer qualitative problems facing Openshaw may need to be addressed by a fundamental change to its retail offer in the centre. This will again need careful consideration, particularly given the close proximity of the Sport City complex and other centres such as Droylsden and Gorton. Main food retailing may act as a catalyst for positive change but will need to be carefully balanced against potential wider impacts.

WYTHENSHAWE/NORTHENDEN CORRIDOR

7.9 Wythenshawe centre has a very poor quality retail offer for main food retailing. Similarly, Northenden only functions more as a top up facility with smaller supermarket provision.

7.10 In particular, people do go to the Tesco at Bagley from the Northenden area as from the Wythenshawe area.

RUSHOLME AREA

7.11 The nearest main food retailing to Rusholme lies north-west at Asda Hulme, or south at Fallowfield or to the north east at Longsight. There is a high density of population between the Princess Road corridor and the Rusholme – Fallowfield – Withington corridor that may therefore be underserved by main food retailing.

CITY CENTRE

7.12 We have provided further details on the city centre retail profile and facility in the preceding section. However, the key factor is that there is no main food convenience provision of a large- scale nature. The current facilities provide only a limited range of goods and with the rising city centre population there is a need to travel out of the city centre for bulk food buying. This does however have to be balanced with demand for frequent small-scale shopping in the city centre given the higher propensity for non-family occupancy.

7.13 As part of the more detailed Stage 2 work, we shall be considering each of the above areas in more detail with a view to making recommendations as to how and where the above deficiencies can be remedied.

8. IMPLICATIONS/ISSUES

8.1 From all of the data collation and analysis that we have undertaken there is requirement to consider various matters in detail through the next stage of our work.

8.2 We have prepared a separate Scoping paper for Stage 2 for discussion with the client and provided a summary here of the key factors which will need to be considered:

1. **Hierarchy** – it is evident that there is a form of hierarchy of centres across the Manchester City area and that this requires further analysis to provide a broad policy approach. The combination of retail and social function is an important factor to consider and the relative scale of centres in their future role will require consideration;

2. **Definition of Centres** – certain centres are at the fringes of being recognised as district centres and greater consideration will be needed as to their future role. The differences between centres may mean that a tiered approach to centres could come forwards. With regard to local centres, some may need to be declassified and a view taken on replacement or abandonment;

3. **Centre Boundaries** – many centre boundaries are random in terms of their definition and these will need to be reviewed accordingly;

4. **Restriction on types of uses within centres** – consideration will be required as to the promotion of retail uses as well as non-retail uses and how this balance can be achieved appropriately in centres. This may be a broad policy consideration or specific centres may need considering accordingly.

5. **Retail Development Role in Regeneration** – some of the areas of potential deficiency also align themselves with major regeneration areas and consideration will be needed as to how a policy could enable regeneration through retailing where appropriate;

6. **Retail Corridor** – there is a clear opportunity to consider policies through a retail corridor approach where centres inter-relate with each other where facilities can benefit by wider area;

7. **Centre Action Plans** – this will form the basis of Stage 2 of the report but these Action Plans will need to consider a variety of key matters and as follows:

   - Building on success of centres where appropriate;
   - Managing decline of centres where appropriate;

- Filling in gaps in the network of centres (see retail deficiencies etc);
- Management of centres;
- Action programme for centres;
- Environmental improvements;
- Maintenance etc.
- Ownerships and key constraints to development
- Potential new development sites
- Funding opportunities

8.3 It will be evident that there will be broad policy responses required for the city area overall regarding centres and their roles as well as specific responses for each centre. As noted in the Matrix of where centres currently lie, each area requires a more targeted policy response and this will be achieved through the preparation of the Action Plans.