Centres Study

Manchester City Council

STAGE 2 REPORT

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Contents

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1. INTRODUCTION

INSTRUCTION

1.1 CB Richard Ellis (formerly CB Hillier Parker) was instructed by Manchester City Council to undertake a wide ranging and detailed strategic study of local and district centre retail and service provision across the Manchester City area. The study's key focus is the 16 district centres within the city, but it also considers the local centres, as well as providing an overview of the relationship with the city centre function.

1.2 This is a unique study. Studies of this kind commonly focus on the retail function of centres, and this important role is of course dealt with in some detail here. However, this study places an equal emphasis on the wider range of facilities and services that make an important contribution to the overall role and function of centres, to provide an assessment of "social inclusion" issues affecting local and district centres.

1.3 The original study brief envisaged its completion in two Stages and our approach has been consistent with this. Accordingly, our Stage 1 report (submitted previously) involved an extensive data collection exercise, including for example a street survey of shoppers in each of the 16 district centres, and a unit by unit analysis of all Manchester's district and local centres. This information was used to analyse the role and function of each of the centres, re-examine the retail hierarchy in Manchester (and indeed examine the appropriateness of a "retail" hierarchy), evaluate the quality, viability and diversity of centres, review in broad terms the opportunities for further convenience retail provision, and identify a range of centres to be studied in more detail in Stage 2.

1.4 This exercise generated a multitude of data outputs. The synthesis of this huge volume of information enabled us to present in our Stage 1 report a succinct summary of the status of each of Manchester's centres, and the issues facing them moving forward. The purpose of this Stage 2 report is to take this benchmarking and evaluation forward and identify a strategic response to secure the long term vitality and viability of centres on a city wide basis, in order to inform the Council's UDP review.

OBJECTIVES

1.5 The key objectives identified by the brief and required to be met in Stage 2 included:

1. To develop a strategy to deliver centres contributing to achieving sustainable communities in light of changing retail patterns.

2. To investigate the feasibility of maintaining areas with distinctive characteristics that are important for their long term sustainability, whilst preserving their commercial viability.

3. To identify the social inclusion value of centres in terms of their social infrastructure, and also how they promote social inclusion through accessibility and mobility.

4. To establish a framework that will help monitor the performance and prospects of centres.

5. To recommend a policy approach in relation to centres that are either borderline or no longer viable.

1.6 As the study has evolved, objectives 3 and 4 have effectively been addressed in the Stage 1 report. Our approach to meeting each of the remaining objectives in this Stage 2 report is discussed below.

APPROACH TO THE STUDY

1.7 In responding to the brief it was envisaged that a selection of centres would be made to use as case studies in generating an overarching strategy and policy response. However, during the course of the study it became apparent from discussions with Council Officers that it would be beneficial to examine in some detail <u>each</u> of the 16 district centres. Accordingly, at the heart of this Stage 2 report a detailed action plan is provided for each of these centres.

1.8 This builds on the detailed understanding of the role and function of each centre, and the challenges they face, established during the Stage 1 work. Solutions to the issues faced by each centre are set out in the action plans, through examining development, environmental, and management factors. Moreover, in producing the action plans we have also had regard to the need to review UDP designated centre boundaries, identifying key land assembly issues, and establish the principal agencies to be involved in their future development. For each centre, an "immediate priority" is suggested highlighting where we consider attention should be focused in the first instance.

1.9 Clearly, in setting out these action plans it is important that they are not seen to exist in a vacuum, but rather to reflect and be consistent with policy trends and changes in the wider economy. For this reason, our approach to Stage 2 of the study has covered three further important aspects.

1.10 Firstly, we have reviewed relevant literature and other research material on accessibility to and role of district and local centres, neighbourhood shopping and service facilities. This has included examination of a wide range of documents, from National Planning Policy Guidance to the work of the Social Exclusion Unit, as well as Ministerial speeches, emerging government policy (in the form of White Papers), and academic work.

1.11 Secondly, we have undertaken a detailed review of the key trends in retailing and service provision of relevance to the local and district centres in Manchester. In our Stage 1 report, we set out trends operating at the national level; this overview is repeated in our Stage 2 report for ease of reference but is also built upon to include more localised trends. Drawing on a wide range of data sources, we have identified 12 main trends ranging from 'polarisation' by retailers toward larger schemes/centres, to rationalisation of the Post Office network, and the growing role of Asian and Ethnic retailing.

1.12 Thirdly, we have identified new broad policy approaches for district and local centres in Manchester. This builds upon the existing UDP Polices, and identifies a further eight topics to be addressed as new policy evolves. These are discussed in detail in this Stage 2 report, and range from the need to redefine centre boundaries across the city, to development, environmental and management policy responses, and the particular issues raised by hot food takeaways and other A3 uses.

1.13 Taken as a whole, these three elements provide the context for, and underpin, our action plan analysis. Importantly, at each stage, through data collection and analysis, the preparation of action plans, consideration of the literature and trends in retailing and service provision, and formulation of a new policy approach, we have been guided by the overarching aim of ensuring that the resultant strategy is consistent with delivering centres that contribute to achieving sustainable communities. As the study has progressed the extent to which this has been addressed has been kept under constant review, and the outcome is explored, tested and made explicit in section 6 of this report.

Report Structure

1.14 Following this introduction, in section 2 we set out our review of the evolution of policy and research methodologies relating to accessibility and the role of neighbourhood shopping and services. In section 3, we outline key economic trends, including the national trends presented in the Stage 1 report, and additional trends operating at a more local level.

1.15 In section 4 we present our discussion of suggested new policy approaches for district and local centres in Manchester, before moving on in section 5 to setting out the detailed action plans for each of the 16 district centres. Section 6 discusses the conceptual framework underpinning our work, relates it to the concept of “sustainable communities”, and provides an evaluative framework within which the status of centres can be assessed.

1.16 In section 7 we summarise the key themes emerging from this Stage 2 report, and set out key conclusions and recommendations. This section outlines each of the eight main broad policy approaches (from section 4), sets out the key issues emerging from the 16 action plans (presented in section 5), and provides a brief overview of the most relevant issues arising from our analysis of the local centres. It also summarises the relationship between the study and the concept of “sustainable communities”.

1.17 We complete section 7 by dealing with three further issues. Firstly, we identify the key agencies likely to be involved in the implementation of the action plans over the short to medium and long term. Secondly we encapsulate the key issues and themes emerging from the study into a series of 10 objectives, representing the key principles to be followed whilst putting in place a city wide strategy for the district and local centres. Finally, we identify a number of further recommendations focusing on areas where we consider additional more detailed analysis to support this study is warranted.

2. EVOLUTION OF POLICY AND RESEARCH METHODOLOGIES

2.1 In this Section, we have reviewed relevant literature and research on access to food shopping and the role of local centres. We have sought to identify standards of accessibility that have been adopted in other urban areas, in order to provide the context both for this study and for any other more detailed assessment of the district and local centres which the Council may subsequently adopt in Manchester.

EVOLUTION OF POLICY ON LOCAL SHOPPING PROVISION

PPG6: Town Centres and Retail Developments (June 1996)

2.2 The publication of PPG6 in June 1996 reaffirmed the Government's commitment to town centres. The objectives of PPG6 include the need 'to sustain and enhance the vitality and viability of town centres.' A key driving force behind PPG6 was the need to slow the decentralisation of retailing to out of centre locations in order to ensure a more equitable spatial distribution for all members of the community. Other objectives of PPG6 are 'to focus development in locations from which all customers are able to benefit and maximise the opportunity to use means of transport other than the car 'and 'to ensure availability of a wide range of shops, employment, services and facilities to which people have easy access by a choice of means of transport.'

2.3 At the outset, PPG6 indicates that town and district centres should be the preferred location for developments that attract many trips, and local planning authorities are to adopt policies to:

- Locate major generators of travel in existing centres, where access by a choice of means of transport, not only car, is easy and convenient;
- Enable town, district and local centres to meet the needs of residents of their area;
- Safeguard and strengthen existing local centres, in both urban and rural areas, which offer a range of everyday, community, shopping and employment opportunities;

- Maintain and improve choice for people to walk, cycle or catch public transport; and
- Ensure an appropriate supply of attractive, convenient and safe parking for shopping and leisure trips.

2.4 PPG6 provides little guidance on the role and function of local centres. In considering planning for retail developments at paragraphs 3.18 and 3.19, it suggests actions that local authorities should take in relation to district and local centres. Local authorities are to encourage, through planning policies and actions, a wide range of facilities in district and local centres, consistent with the scale and function of the centre, to meet people's day-to-day needs, so reducing the need to travel. They are also to encourage appropriately sized, local supermarkets and seek to retain post offices and pharmacies in existing district and local centres and discourage their inclusion in out of centre retail developments by imposing appropriate conditions.

2.5 In the glossary of terms in Annex A, PPG6 defines different types of centre as follows:

- Local Centre: Small grouping usually comprising a newsagents, a general grocery store, a sub post office and occasionally a pharmacy, a hairdresser and other small shops of a local nature.
- District Shopping Centres: Grouped shops, separate from the town centre, usually containing at least one food supermarket or superstore, and non-retail services such as banks, building societies and restaurants.
- Town Centre: City, town and traditional suburban centres, which provide a range of facilities and services and which fulfil a function as a focus for both the community and for public transport. It excludes small parades of shops of purely local significance.

2.6 Overall therefore, PPG6 provides little guidance on how to measure the needs of local areas and access to local facilities. The Social Exclusion Unit commented that PPG6 adopts a reactive planning approach, as it controls out of centre development instead of adopting a more proactive approach, which would actively promote local retail centres (Social Exclusion Unit, 1999, p 36). This reactive approach was viewed by the Social Exclusion Unit as accelerating the decline of local shops. They stated:

"*superstores have widened the range of goods and services they provide, progressively including more local services, such as chemists and post offices, thereby reducing the number of such outlets in local centres. As a result local centres have become fragile and are contracting"* (Social Exclusion Unit,1999, p36).

2.7 However, whilst this comment is valid, it is also the case that by some widening of the range of goods and, to a limited extent, services they provide, and consolidating them in a single unit with an attractive shopping environment operated by a leading national retailer representing a cast-iron covenant, superstores can play an important role in anchoring district centre performance. The commercial reality is that in many cases the alternative is the fragmentation of goods and services into units operating at the margins of viability.

2.8 It is also important to ensure that the role played by superstores is complementary to, rather than at the expense or instead of, the expected wider function of district centres. A superstore or supermarket of an appropriate scale, offering a carefully considered range of goods and services, and fully embedded and integrated into a district centre, can anchor the broader range of shops and services that enable it to meet all the day to day needs of the local population. Stores that over dominate district centres to the extent that other shops and services become marginalised are often extremely popular, but this represents a less sustainable and socially inclusive model. In this scenario, the store does not perform an anchor role as such.

2.9 Chemists and post offices represent a case for special consideration, and their inclusion in a district centre superstore at the expense of, rather than alongside, provision in nearby local centres is not to be encouraged. Trends in chemist and post office provision are discussed below in section 3. However, an important element of emerging policy in terms of pharmacy provision is consideration (and presumably maintenance) of consumer choice, and the extension of services at district centre superstores may be assessed in this context. Post offices within local centres, subject to the continuing wider trend of rationalisation as part of the "urban reinvention" programme may prove to be more at risk.

White Paper: Saving Lives – Our Healthier Nation (July 1999)

2.10 The Government's recognition that a more proactive approach was needed to rejuvenate local centres emerged in the White Paper, 'Saving Lives: Our Healthier Nation'. Its aim was to provide a comprehensive Government wide public health strategy, improving health and reducing the health gap i.e. health inequalities.

2.11 The White Paper identified that poverty, low wages, occupational stress, unemployment, poor housing, environmental pollution, poor education, crime and disorder, lack of recreational facilities and limited access to transport and shops all impacted on people's health. It also acknowledged that previous Government health campaigns tended to widen the health gap, because the "*better off took more notice and changed their behaviour faster than others did*". (DOH, 1999a Chapter 4).

Reducing Health Inequalities: An Action Report (July, 1999)

2.12 In addition to the White Paper, the Government produced the report 'Reducing Health Inequalities: An Action Report'. This addressed the social, economic and environmental action to be taken across Government and through partnerships between the various local and regional organisations in England, to reduce health inequalities (DOH, 1999b, p3).

2.13 In addressing the conclusion that 'limited access to transport and shops' had an impact on health, the report stated that "*the Government wants everyone to be able to make healthy eating choices'* and also acknowledged that "*some deprived neighbourhoods are characterised by lack of easy access to shops that sell goods, including food, at reasonable prices"* (DOH, 1999b, p29). The report referred to the emerging work which was being conducted by the Social Exclusion Unit's Policy Action Team as the action to be taken to address this issue.

2.14 These two factors – the physical provision of shops (particularly those selling fresh produce), and access to those shops – are central to our analysis of Manchester's centres. So, for example, our assessment takes into account the quantum of retail provision, the availability of supermarkets (discount and full price) and superstores, the availability of fresh produce and, importantly, accessibility to this offer on foot, by car, and by public transport.

Social Exclusion Unit Policy Action Team Report 13 (1999)

2.15 As a consequence of the realisation that the gap between the successful decentralised shopping centres and the less successful smaller localised centres was widening and thus affecting the deprivation levels of neighbourhoods, the Government established the Social Exclusion Unit (SEU) in 1999.

2.16 The subsequent SEU's Policy Action Team (PAT) Report 13, 'Improving Shopping Access for People Living in Deprived Neighbourhoods' was the first Government document to actively address the issue. It was a discussion document, which justified the need to improve the neighbourhoods in which people live in order to provide a beneficial impact on the physical and mental health of those who live there. This work was seen as expanding and complementing the work which had already been undertaken for the Government's White Paper 'Our Healthier Nation'.

2.17 The goal of the PAT 13 Report was to:

"support the provision of accessible retail opportunities, which respond to locally identified needs in an integrated way; provide a range of quality goods at affordable prices; and offer facilities which are vibrant, viable and sustainable." (Social Exclusion Unit, 1999, p3)

2.18 Again, therefore, the two themes of availability and accessibility are prominent in the Social Exclusion Unit's thinking, and additional themes of vitality and viability, and sustainability, are introduced in line with central Government guidance, for example as expressed in PPG6 (discussed above). In order to achieve this goal, the report identified five key elements, which were needed. These include:

a) a local retail strategy;

b) proactive planning;

c) crime reduction and the fear of crime;

d) improving business support for small retailers;

e) easing business burdens on small retailers.

2.19 Each of these was discussed in detail. The most relevant to this Study are a local retail strategy and proactive planning, although the study also deals with issues of crime. In considering a local retail strategy the SEU was concerned that there is no established practice of developing a retail strategy when local regeneration strategies or plans are constructed; consequently there is no single person, organisation or body responsible for pulling together the views and needs of local stakeholders (including retailers) so that retail needs can be planned and implemented successfully at the local level. The PAT 13 report sets out as Action 1, the recommendation of developing models for neighbourhood management to explore the potential of local retail forums in developing local retail strategies.

2.20 We agree with the tone of this finding, that there is a need for a single body to coordinate an approach at the local level to ensure that the needs of all stakeholders can be met, and to provide an integrated and successful response. This is particularly important in major urban areas such as Manchester with a large number of local and district centres affected by complex and multi-faceted issues. Our suggested policy response to this, the creation of a District Centre Regeneration Company to echo the success of the City Centre Management Company, is set out below (section 4).

2.21 In relation to proactive planning, the SEU recommended that the principles for any future planning strategies, should:

- be proactive, rather than reactive;
- strengthen local centres within urban areas rather than weaken them;
- work with communities within their existing structures, however informal, to develop locally generated solutions;
- take account of social needs and recognise the value of community meeting places; and
- capitalise on the local authority's role as an enabler.

2.22 The SEU considered that following these principles should "foster and underpin the provision of local shops and services and limit the growth of out-of-centre retail developments in locations that are relatively inaccessible without a car" (Social Exclusion Unit, 1999, p6). The report stated that planning could play a much more positive and proactive role to strengthen local shopping centres in a number of ways. These included (interaction with approach taken in Manchester centres study outlined briefly in italics, where relevant):

- Assessing the coverage of local centres, identifying deficiencies in access to shops and services (understanding accessibility is a key element of the study, in absolute terms (e.g. measuring the number of people with easy walking access to a centre), and relative terms (e.g. measuring people's views on accessibility issues);
- Working closely with the local communities to identify their needs, deficiencies in provision and what types of provision need to be added to local centres (extensive consultation by way of a street survey to understand the needs of local people was at the heart of the study);
- Agreeing with the local community a vision for the development of the local centre;
- Adopting and actively pursuing policies to:
  - encourage private investment in the centre (development needs and opportunities are summarised in section 4 and set out in detail in section 5, and policy measures by which they may be realised also proposed in section 4);
  - influence the location of Council and other public services (the SEU recommends the concentration of services in accessible locations (i.e. local and district centres) – centres that are weak in this regard are identified in the Stage 1 report profiles, highlighted further in section 5 below, and this is explicitly taken into account in our consideration of hierarchy) ;
  - improve the centre through an action plan, using planning, regeneration and highway powers (action plans for each centre are set out in section 5);
  - encourage economic development, including the support for small businesses;
- Actively seeking potential providers of key services that are missing to fill in key gaps in provision. (Social Exclusion Unit 1999, p37)

2.23 To address proactive planning, Action 2 therefore recommended that as part of the Urban White Paper, the Government set out a more proactive approach to planning for community needs at local level, including retailing, which should then be followed up by a DETR Planning Policy Guidance Note.

2.24 Under this Action point, the SEU also identified a number of principles which should provide the basis of the proactive planning approach in the Urban White Paper and subsequent PPG6. These are outlined below:

- Improvements in local shopping access should be identified as a core issue for regeneration funding;
- A more proactive approach should be taken to help articulate the community's vision for achieving improved access to shopping;
- Planners should be encouraged to work at a neighbourhood level to identify and market commercially viable retail sites;
- Where appropriate a range of services which meet everyday needs should be grouped together to build up local centres e.g. a health centre and pharmacy, and an outlet which provides access to cash;
- Local authorities should discourage the provision of new stores over 1,000 sq m floorspace outside major centres in their development plans;
- Local authorities should be more flexible in permitting "mixed use" of premises to facilitate existing non-shop facilities to provide shopping, and shops to provide other services;
- Local authorities should actively promote flats over shops and change of use of shops where appropriate to make existing local centres more viable.

2.25 The New Policy Institute commented in its briefing paper on 'Food Access' that the SEU's PAT Report was "*a useful first step in recognising the Government's role in tackling access to shops*" but *"there was no clear framework through which Government (central and local) could tackle the issues"* (New Policy Institute, 2000). Despite this, the report did identify the need for a considerable amount of further research in this field.

New Policy Institute Briefing Paper: Food Access (May 2000)

2.26 The New Policy Institute produced a Briefing Paper regarding the issue of Food Access. It stated '*Food access issues need to be part of regeneration and social inclusion initiatives'* (New Policy Institute, 2000,p1). The briefing paper continued to highlight that the choice of food available to those on low income critically depends upon how much money households have to allocate to food, how much it costs and also what food is readily available in local shops. As discussed above, our evaluative framework takes into account the quantum of retail provision, the availability of supermarkets (discount and full price) and superstores, the availability of fresh produce and, accessibility to this offer.

2.27 The New Policy Institute highlighted that there was no nationally agreed definition of what constitutes food access, and stated that "*without an agreed definition, regulation and enforcement to ensure access at national or local levels is not a practical proposition"* (New Policy Institute, 2000,p5). They consider that such a definition needs to cover both economic access and physical access, whereby physical access refers to the range and quality of food available in shops that people can actually reach, whether by foot, public transport, or if they have access to one by car. This Study focuses on physical access issues rather than economic access, although the latter is taken into account through examination of the availability of discount supermarkets.

2.28 In addition, methods to move forward are also set out. The New Policy Institute suggest:

- The Government explores the potential for a 'New Deal to Food' to promote cross departmental strategies and guidance for promoting food access as part of the bigger policy framework for tackling inequalities.
- The UK Food Standards Agency, in collaboration with the devolved territories and national Food Standards Agencies, should increase the resources available for defining the evidence base for action and monitoring base for policies. The FSA should coordinate activities at national levels.
- Problem definition at local, regional and national levels, and potential policy options, should involve local communities in a 'bottom up' planning process, as well as the major and smaller retailers, and ethnic minority retailing community. (New Policy Institute, 2000, p1)

National Strategy For Neighbourhood Renewal: PAT Audit (January 2001)

2.29 The National Strategy for Neighbourhood Renewal: Policy Action Team Audit Report was the Social Exclusion Unit's follow-up document to the PAT Report 13 and was produced in January 2001. Patricia Hewitt MP, Minister for Small Business and e-Commerce, in her 'foreword' re-enforced that there was a need to improve access to shopping opportunities in order to meet people's basic needs by stating, "*in many cases, people are living nowhere near the everyday services on which they depend – including shops. One aspect of the National Strategy is about bringing shops back to deprived areas, which, without them, cease to be sustainable communities*" (Social Exclusion Unit, 2001). The concept of "sustainable communities", underpinned by social inclusion, represents an overarching theme linking many strands of our analysis. The meaning of this concept, and its application to Manchester, is discussed in more detail in section 6.

2.30 In addition to redefining the problems facing local neighbourhoods, the Audit Report set out the 'progress to date' of the Actions identified in the PAT 13 Report.

2.31 In considering Action 2, which recommended the Government set out a more proactive approach to planning for community needs at a local level via the Urban White Paper and a Planning Policy Guidance Note, the Audit report distinguished between the requirement for the Government to set out a more proactive approach in the Urban White Paper and the principles of a proactive planning approach. The 'progress to date' for each, therefore was examined separately.

2.32 The report indicated that the Urban White Paper 'Our Town and Cities: The Future - Delivering an Urban Renaissance' (2000), set out the Government's broad approach to securing an urban renaissance including the need to help local communities express their views on how their area should be developed. This was the 'progress to date' on proactive planning. However, the Urban White Paper only sets out the Government's aspirations for future planning policy guidance and not actual guidance.

2.33 In terms of the ‘progress to date’ for defining a set of principles necessary for a proactive planning approach, the report states that the “*Local Government Association (LGA) had identified the need to carry out a study into a range of actions necessary to improve neighbourhood shopping provision and make it more viable”* (Social Exclusion Unit, 2001). However, having consulted with the LGA, no actual study was ever undertaken.

2.34 Real progress on these issues has therefore been rather limited. National policy has identified a clear range of issues, but has not yet provided guidance on how these issues might be addressed in practice.

PPG13: Transport (March 2001)

2.35 In March 2001, PPG13 was published. This was a considerable step forward in ensuring that a more proactive approach was taken to increase accessibility to local shops and services. PPG13 states:

“A *key planning objective is to ensure that jobs, shopping, leisure facilities and services are accessible by public transport, walking and cycling. This is important for all, but especially for those who do not have regular use of a car, and to promote social inclusion*” (PPG13, 2001).

2.36 The PPG also requires local authorities to locate day-to-day facilities, which need to be near their clients in local and rural service centres, and adopt measures to ensure safe and easy access, particularly by walking and cycling. Primary schools, health centres, convenience shops, branch libraries, local offices of the local authority and other local service providers, are all given as examples (PPG13, 2001).

Food Poverty Eradication Bill (December 2001)

2.32 The Food Poverty Eradication Bill was introduced to Parliament in 2001, on behalf of the Food Justice Campaign. Whilst the Bill did not progress any further, it did highlight to the Government the problems of food poverty and its causes. It stated:

"Food deserts or shopping deserts, where residents cannot reach shops selling affordable, healthy food, are becoming a problem. They are caused by large-scale supermarkets and out-of-town or town-edge shopping developments killing off local shops. They discriminate against low-income shoppers who use the local or city centre shops more accessible by foot or public transport". (Food Justice Campaign Rationale).

2.33 Whilst there is some truth in this statement, it is only a partial representation of the reality on the ground. Food deserts have indeed, in some places, become a problem. Elsewhere, as discussed above, supermarkets and superstores within district centres can play a positive role in anchoring the centre as a whole, and ensuring that people are provided with affordable, quality food in accessible locations. The planned *and ongoing* improvements to Harpurhey and Cheetham Hill appear to be examples of how this can be achieved. Sport City and Hulme are also examples of where this has been achieved – the reality of the previous provision in these neighbourhoods (Beswick and Moss Side, respectively) was one of failing centres with no realistic prospect of revival in that form. However, in the case of Sport City and, to a lesser extent, Hulme, rather than anchoring the centres the superstores have become the centres, and in both these locations it is important to consider ways in which a more rounded offer can be provided. Both are successful and popular, but it is vital in transferring the lessons learnt at these centres to other locations that the importance of establishing a fully rounded offer supported – rather than dominated – by stores of an appropriate scale is recognised. Finally, it should be noted that in city centres, "metro" style formats operated by retailers including Tesco, Sainsbury and Somerfield have helped to secure access to basic food provision for those who shop there.

Ministerial Speech at BURA/BRC Conference on Retail & Regeneration (May 2002)

2.33 The Ministerial Speech (given by Michael Bach) in May 2002, addressed the importance of regeneration through retail initiatives, which was highlighted in Action 2 (ii) of the National Strategy Audit report. In identifying the problem, he consolidated many of the views of previous commentators and "*advocated positive planning*" and the need for a *"new culture and new style in planning"* (Bach, 2002). The speech also stated "*I believe that retail development can help make communities across the country more sustainable, prosperous and successful, but developers and retailers need a clear steer to make this happen*". (Bach, 2002).

2.34 In setting out the framework to achieve this, the speech recognised the need to strengthen the local dimension of PPG6 and the implications for regeneration and neighbourhood renewal. Five key issues were outlined, as follows:

- We need the right shops in the right places to meet day-to-day shopping needs in the heart of the community;
- Regeneration does not necessarily mean building big or building low;
- Retail development must meet the needs of local people in deprived communities;
- Retail development must add value to communities;
- We need to improve the quality and management of the public realm.

2.35 The Government outlined the need to identify areas of poor accessibility to retail facilities and address this through the regeneration of local centres. In seeking to ensure easy access to shops for everyone, especially the least mobile, the aim is to ensure that in urban areas everybody has a local shop within an easy walking distance. The Speech indicated that:

"*We need to find ways of filling the gaps so people are able to get everyday needs as close to home as possible. This is 'the pint of milk test' and passing 'the pint of milk test' will involve regenerating existing retail centres – especially at district and local level – not vacant out of centre sites*". (Bach, 2002)

2.36 It was emphasised that strategic choices and priorities need to be made, as to which centres should be given priority for retail-led regeneration and to give a clear lead on where growth must be focused. This is a particularly important issue for Manchester at the present time.

2.37 In considering the role of retail-led regeneration, the Government voices concern about 'building big boxes in deprived areas for the better off to drive to'. In some places hypermarkets are seen as Trojan horses which can create jobs, but spell the death of local shopping for miles around. The Government stresses that development must recognise the local context and meet the needs of local people. In many cases this will mean a fine grain of local stores and local centres serving people's needs and one size fits all is not an appropriate solution.

2.38 In securing retail development to meet the needs of local people in deprived communities, the Government considers that new ways of working are required. Instead of seeing deprived areas in a negative sense in terms of low income, poor skills and high crime, the attributes that these areas can offer should be recognised such as good employment availability. The Government suggests that retailers need to work much more closely with local agencies, adapting their employment practices and store content to reflect the needs of the local community.

2.39 For retail development to add value to local communities, the emphasis is placed on mixed use schemes which add affordable housing and contribute to regenerating communities through job creation and training programmes.

2.40 Whilst the revised PPG6 or Good Practice Guidance may seek to ensure that local authorities undertake 'the pint of milk' test, currently there is a lack of Government guidance on the methodology to enable this type of analysis to be undertaken. The current focus is also much more on access to food shopping rather than access to other local services and facilities. We set out below our review of the research to date.

METHODOLOGIES FOR ASSESSING ACCESS TO LOCAL FOOD SHOPPING

2.41 Research into ‘food deserts’ where a ‘food desert’ has been defined as *“an area with relatively poor access to adequate food provision”* (Wrigley 2000, Clarke et al, 2002, p2041) has been undertaken largely by local health authorities in order to make attempts to improve food access, as a result of the deficiency in nation-wide initiatives and methodologies (Guy, 2002). In addition to identifying the problems related to poor access to shopping facilities, food desert studies have taken the next step and set out methods for identifying the areas of retail deficiency. Much of the work undertaken to date in this field has been by Cliff Guy and Graham Clarke of Cardiff and Leeds Universities.

Deriving Indicators of Access to Food Retail Provision in British Cities

2.42 In their journal article Deriving Indicators of Access to Food Retail Provision in British Cities, Clarke et al, detail three approaches to quantify provision levels in areas of poor access to food retailing. The three methodologies are termed as the ‘Simple approach’, the ‘GIS based approach’ and the ‘Model-based approach’.

2.43 The simple approach and GIS based approach have clearly defined methodologies in the text, which can easily be used and adapted for further research work. However the model-based approach seems more ambiguous, and harder to apply to other research work.

2.44 The simple approach maps the retail grocery floorspace provision per household for each individual postal sector. Whilst this provides a “*first indication of the spatial variations in location of access to the retail facilities*” (Clarke et al, 2002, p2044), it does not take into account the interaction that occurs between residence zones and locations.

2.45 The GIS based approach is explained as a four-step procedure. First, all food shops in the chosen area are mapped, distinguishing between multiple retail stores and independent stores. Second, the walk-in catchment area of each multiple store (500 m boundary) is defined, this gives the first indication of possible areas of poor access. Third, these areas are then assessed in terms of their level of deprivation “*in the belief that areas with poor accessibility to shops are of policy concern only if their inhabitants are likely to suffer low car ownership and other indices of deprivation*” (Clarke et al, 2002, p2045). Fourth, these deprived areas are assessed in terms of the independent retail offer available within easy access.

2.46 Food desert areas are therefore identified as those areas with a sparse array of multiple and independent stores. One main drawback to this approach is that "*this method assumes that consumers only use their nearest shop, which may not be realistic*" (Clarke et al, 2002, p2045). The model-based approach uses a formula to identify areas which have low accessibility levels to adequate shopping provision. The approach is based on two performance indicators 'aggregate level of provision' and 'level of provision per household'. The approach was first introduced by Clarke and Wilson (1994) and they have used it to examine access to food shopping in both Leeds and Cardiff.

2.47 The model aims to quantify accessibility to grocery retailing provision, according to where residents shop. It is therefore based on movements of shoppers, rather than the geographical distribution of grocery shopping options available to residents. The following example is given;

'If the provision for an area is low, but population is also low, then the area is perhaps not to be classified as a 'food desert'. However if an area has relatively low provision and population is high then this will be a problem area. Also, because of the nature of this performance indicator, it is possible that an area with high provision and high population will be poorly served because the indicator is a measure of the share of a facility that a residential area has' (Clarke et al, 2002, p2048).

2.48 Whilst this approach seems to be the most sophisticated, in terms of technique, taking into account variables such as attractiveness of a retailing destination, consumer expenditure and travel costs, the methodology of the approach could potentially need a large quantity of statistical data, which could be time consuming and potentially difficult to obtain. Guy (2002), compares the GIS and the Model-based approaches, and implies that they show a substantial amount of agreement in their analysis of the geographical areas identified and states "*in addition, the GIS model is able to pinpoint some smaller areas*" (Guy, 2002).

2.49 Research to date has focused on identifying access to local food shopping. As far as we are aware it has not been applied to other activities such as non-food or comparison goods shopping and financial or other services. We consider that the focus on food shopping arises as a result of the necessity for food shopping and its role as an essential activity. Other types of shopping and services whilst important are not necessarily essential. To widen this methodology to other activities would also compound problems with access to data. Unlike for food stores there are no national databases for comparison stores or service businesses.

2.50 Thus, although we have sought to take account of such facilities in our review of the way forward for Manchester's district and local centres, we have had to recognise the difficulties in devising an appropriate methodology for this study. In practice, we have therefore had regard to work done elsewhere in the UK (such as the studies described in the following paragraphs) but have devised a separate method for Manchester which is based on the particular policy and other needs of the district and local centres in the city.

IMPLEMENTATION OF RESEARCH ON ACCESS TO LOCAL FOOD SHOPPING

Cardiff

2.51 Cardiff City Council are in the process of preparing a Unitary Development Plan, which is to be published for consultation in September 2003. The Council have undertaken a study which used a criteria based ranking system to assess the existing district and local centres within the city council boundary. The criteria included factors such as accessibility by public transport, number and type of shops and services and population within a 5 minute walk radius of the centre. The work undertaken by Guy and Clarke on 'food deserts' has in effect been replicated by Cardiff City Council in their own study. The Council are to include a policy in the UDP which will encourage a variety of uses, comprising shopping, leisure and community facilities in those centre's which were identified by their own analysis of provision within Cardiff.

Sandwell

2.52 Sandwell Heath Authority conducted a study into measuring access to healthy foods in a deprived area of Sandwell. In contrast to the study conducted by Graham Clarke and Cliff Guy, the authority firstly identified Tipton Wednesbury as the 'deprived area' and then conducted a full census of every street in that area. This involved mapping the location of shops, assessing the type and quality of goods sold and gaining the views of the shop keepers. The study enabled the authority to identify streets and estates within Sandwell where there were few shops selling fresh fruit and vegetables, produce was very expensive and also areas where inexpensive good quality food was sold. Therefore these were identified as the areas where the majority of the population would have to travel to shops.

2.53 Five implications were identified as a result of the study:

- Poor health, deprivation and unhealthy eating patterns in Sandwell are strongly interlinked;
- Eating patterns in Sandwell may be determined by socio-economic and geographical factors rather than real choice;
- Tackling food access through the use of volunteer labour is not the solution;

- Good public transport can reduce but not remove the problem of food access;
- There are economic, social and environmental reasons to develop a highly localised food economy that is more sensitive to the needs of Sandwell's people.

2.54 This study concentrates on the access to healthy food goods within a defined area. It has been used to form the basis of sustainable food policies in accordance with Local Agenda 21 initiatives. However we understand that it has not been used to influence planning policy within the emerging Unitary Development Plan as the review was considered by the Council to have reached a stage where it was inappropriate to include the findings of the study. The Council are likely to consider the study in the next review of the UDP.

Birmingham

2.55 The Regional Office commissioned Birmingham University's Department of Public Health and Epidemology to map fresh fruit and vegetable retailers in the West Midlands using the local authority's routine food premises register. Zones within an 800 m radius and 5, 10 and 15 minute walk distance of fresh fruit and vegetable retailers were created and zone populations estimated. Using a Geographical Information System (G.I.S), the use of these data were validated. The walking distance model found that 79% of the population of Birmingham City Council's population lived within a 15 minute walking distance of a fruit and vegetable retailer.

2.56 At the same time, the author became involved in work conducted on behalf of Birmingham Health Authority which involved a detailed collection of data on the cost, quantity and range of foods including fruit and vegetables in the six wards of Small Heath, Aston, Nechells, Washwood Heath, Sheldon and Hodgehill.

2.57 These data were used to:

- Map fruit and vegetable retailers and estimate populations living within a 5, 10 and 15 minute walk of a retailer by selecting unit postcodes within the appropriate zones;
- Assess the routine food premises registration data by comparing premises registered with those identified in the survey; and

- Create a composite ‘access to food’ indicator based on range, cost and quality of fruit and vegetables for retailers in the Small Heath and Hodge Hill constituencies. (Saunders. P.J 2002, p9)

2.58 The Birmingham Health Authority study recommended that further work should be undertaken to:

- Extend the mapping of access to food premises;
- Refine the index to reduce the level and detail of data required while retaining robustness;
- Extend the index mapping by obtaining detailed information from retailers in Birmingham and Wolverhampton on cost, quality and range;
- Update participating local authority food premises registers; and
- Explore the feasibility of adding the collection of data on foods to routine hygiene inspections of premises conducted by local authorities.

2.59 Birmingham University obtained funding to develop the next phase in this food mapping project from the Birmingham and Wolverhampton Heath Authorities. We understand however that work is still currently being undertaken. We have also recently been undertaking a district and local centres retail study for Birmingham City Council, which acknowledges the work described in the preceding paragraphs and has some similarities to our work for the City of Manchester.

ACCESSIBILITY STANDARDS

2.60 It is also important to analyse accessibility standards by different modes of transport. In terms of walking standards, PPG6 recognises that people are unlikely to walk more than 200-300 metres carrying shopping, whether walking to the primary retail area, to a town centre car park or to public transport. The Department of Transport, Transport Statistics National Survey 1999/2001, identifies an average walking trip as 0.6 miles, with a maximum standard of 5 miles.

2.61 Other work which we have completed elsewhere suggests that the primary 'walk in' catchment of many local centres is generally about 500m, suggesting that this represents a reasonable measure of accessibility to local shopping facilities for those travelling on foot, (typically for 'top up' purchases).

2.62 In terms of local bus standards, the Department of Transport, Transport Statistics National Survey 1999/2001, found that the average trip people took by local public bus was 4.6 miles in distance, and times ranged from an average of 30 minutes for local buses outside London, to 38 minutes for London buses (although these trips were shorter in distance on average).

2.63 The Transport Statistics Fact Sheet 6 – Travel to Shops in GB, provides details on shopping distances. The average distance people travel for shopping purposes was 4.2 miles and the average distance for other personal business trips, i.e. banks, doctor's or library was 4.6 miles. The average distance travelled by people without a car for food provisions was 2.2 miles and the average distance to non-food was 3.4 miles.

2.64 We would normally expect, in a dense urban network with well developed public transport such as Manchester, that a higher level of accessibility to food provision is achievable and is to be expected. Generally the higher the income the greater the distance travelled for shopping purposes. The average length of a shopping trip steadily increases in relation to income. It has been found that those on the lowest income band travel an average of 3.1 miles and those in the highest income band travel an average of 5.0 miles (Transport Statistics fact sheet 6– travel to shops in GB). This may be relevant to the identification of 'gaps' in retail provision, especially in more affluent areas of Manchester.

SUMMARY

2.65 To date there has been little Government recognition of the importance of local centres in meeting the needs of shoppers. Whilst PPG6 recognises a role for local centres, its main effect is in limiting out of centre development. It provides little guidance on proactive planning for the future of these centres. Although concerns over lack of adequate access to food shopping facilities have been taken forward by the Social Exclusion Unit and the

Food Justice Campaign, to date little progress has been made on how to improve access to shopping opportunities and the actions necessary.

2.66 The PAT 13 Report by the Social Exclusion Unit is the most comprehensive attempt to address issues of access to shopping and other services, and the interaction between this report and the approach taken in this study is detailed above. A key element was the need for more positive and pro-active planning to strengthen local shopping centres by:

- Assessing the coverage of local centres, identifying deficiencies in access to shops and services;
- Working closely with the local communities to identify their needs, deficiencies in provision and what types of provision need to be added to local centres;
- Agreeing with the local community a vision for the development of the local centre;
- Adopting and actively pursuing policies to:
  - encourage private investment in the centre;
  - influence the location of Council and other public services;
  - improve the centre through an action plan, using planning, regeneration and highway powers;
  - encourage economic development, including the support for small businesses;
- Actively seeking potential providers of key services that are missing to fill in key gaps in provision.

However, there has been no guidance on how to convert this into detailed planning policy, although this may of course be addressed in the forthcoming PPS6. Manchester City Council may therefore wish to review how best to take on board these issues at an early date, once PPS6 has been published.

2.67 It is only more recently that the Government has started to recognise the role for retail-led regeneration in local centres and the fact that such a strategy will necessitate prioritisation of the future of certain centres over others in cities like Manchester. To date, there has been little progress on how to improve access to shopping opportunities and the actions necessary. The work of the City Council, and this analysis, are therefore potentially at the forefront of the government's plans to promote a renaissance in local shopping.

2.68 There are no nationally recognised standards for measuring access to shopping provision, in order to inform regeneration strategies. The research by Cliff Guy of Cardiff University and Graham Clarke of Leeds University has developed a number of methods for measuring access to food shopping provision. This work considers a range of factors including the geographical distribution of stores and their catchment areas, the demographics and socio-economic profile of catchment areas and the ease of movement of shoppers to different shops. This work provides a basis for devising a methodology for identifying areas of relative deficiency in Manchester, although it should be remembered that the focus of this study is district and local centres, not food shopping per se.

2.69 Taking all of the research discussed above into account, our analysis deals with the issue of accessibility and the identification of gaps in provision in a number of ways. The "pint of milk" test is important, and we have looked at a 500m buffer around local and district centres in this regard. Equally, we have looked at a 5 minute drive time around the centres. This represents a convenient driving distance, and broadly equates to a 10 minute bus journey – considered acceptable in the context of an urban area like Manchester.

2.70 It is also important that an overly mechanistic approach looking solely at defined zones is avoided, and that other factors are taken into account. We have sought to achieve this in two ways. Firstly, we have obtained the views of shoppers on a number of aspects of accessibility – perception of accessibility is often more important than accessibility in absolute terms. Secondly, we have applied our knowledge of and experience in the Manchester market to inform our assessment in this regard.

2.71 Finally, in evaluating areas of deficiency, it should be emphasised that there should be no automatic prescription of a 'need' in planning terms for any specific scale or form of development. However, the criteria outlined in this section provide a consistent basis for identifying potential gaps, within which a more detailed assessment of local provision may be warranted in due course. Thus, a series of policy approaches for local centres in areas such as Manchester will need to evolve. We anticipate that Manchester City Council will be keen to take forward new policy initiatives for its district and local centres – especially the more 'vulnerable' ones, or those in 'areas of change'. This contextual analysis, together with the advice and analysis which follow in Sections 3 and 4, combined with the new guidance which is published in PPS6, will enable that step to be taken.

3. NATIONAL ECONOMIC TRENDS

3.1 In this Section, we outline the key trends in retailing and service provision of relevance to the district and local centres in Manchester. This expands on the material contained in our Stage 1 Report. In Stage 1, we set out key trends at the national level. This overview is repeated here, and built upon to include more localised trends at the sub-sector level of particular relevance to neighbourhood retailing, looking for example at pharmacies, post offices, and the Co-operative movement.

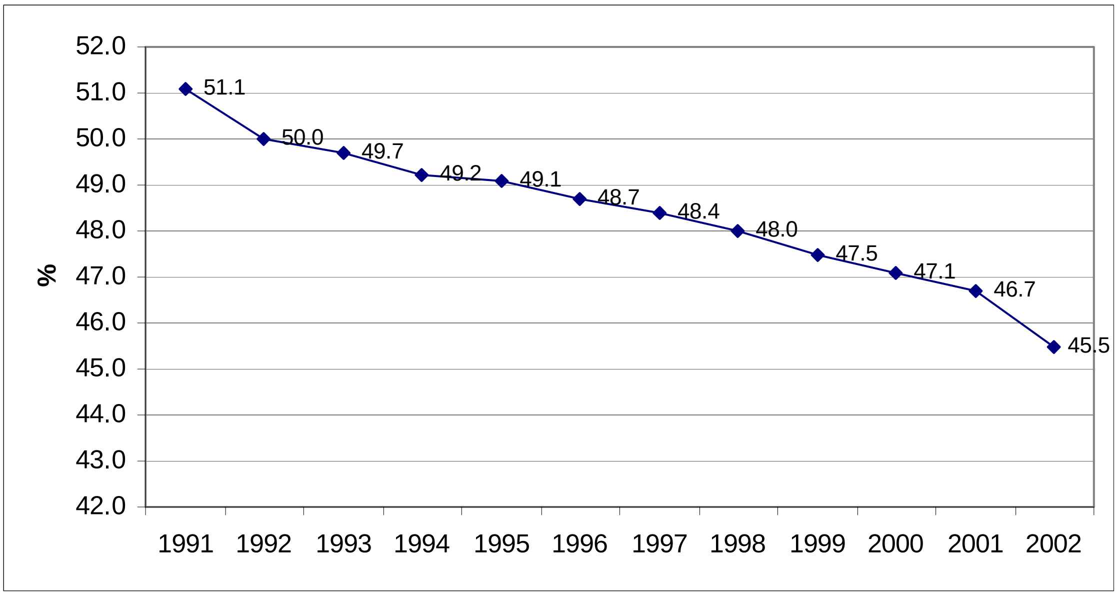
3.2 It is presented in this format to provide a clearer context for our advice on broad policy directions to be followed in district and local centres (Section 4 of this Stage 2 report), as well as the action plans in subsequent sections of this report. This review is drawn from a range of published data sources, including research by Verdict Analysis and the New Economics Foundation, and CB Richard Ellis' in-house research team.

RETAIL SALES

3.3 Retail sales increased by 6.2% between 2000 and 2001. This was the highest sales growth for several years and was largely as a result of increased available expenditure where people re-mortgaged to take advantage of low interest rates. Retail sales growth slowed to 4.2% in 2002 as interest rates stabilised - and in subsequent years growth of no more than 4% is predicted. With the slow down in the growth of retail sales, Verdict Analysis predict different fortunes for retailers in different sectors in the future. DIY, electrical, music, video and software sectors will be faster growing, whereas food and grocery, clothing and footwear and floor coverings all face intense competition with low price inflation (price deflation in some cases) and low volume growth.

3.4 Although high street sales grew by 43% between 1991-2001, this is below the growth rate for all UK sales (56%) as total sales were driven by much stronger growth in out of town sales (150% between 1991 and 2001). Verdict Analysis indicate that the slower rate of high street growth reflects its relative decline in significance over the last decade. The high street now accounts for 45.5% of retail sales compared with 50% in 1992 (Figure 3.1). Figure 3.2 indicates that out of town locations and e-commerce have eaten into high street sales. Future growth of out of town sales is likely to be more limited given the current planning restrictions on out of centre development and the focus instead on town centre development. This may provide an opportunity for some local centres, but only if they are able to offer suitable development/investment opportunities.

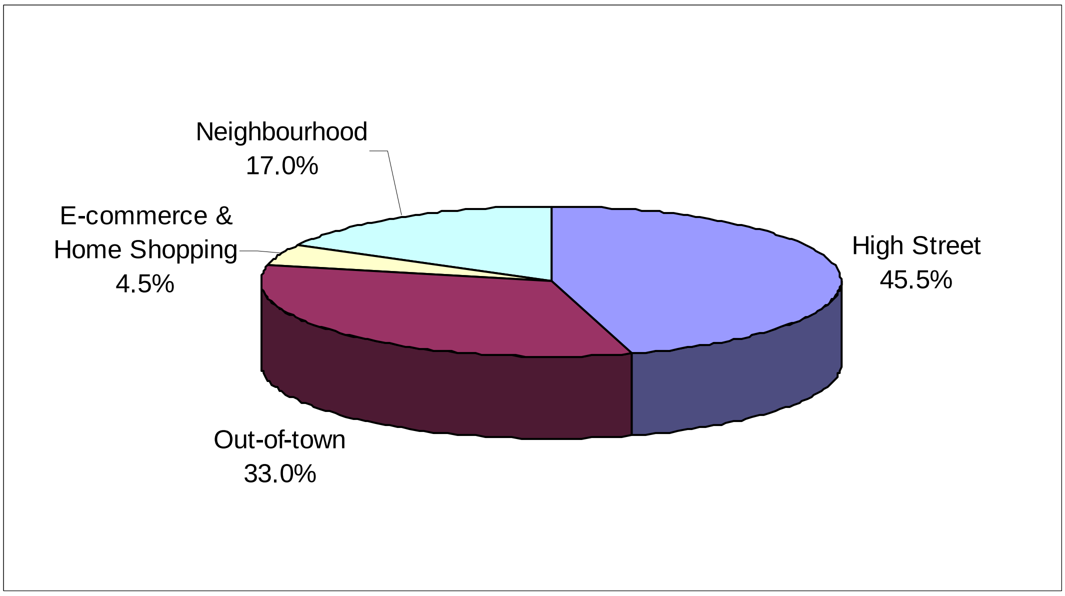
Figure 3.1: High street share of total retail sales 1991-2002



Note: High street figures include out-of-town shopping malls such as Bluewater

Source: Verdict Analysis

Figure 3.2 Share of Sales



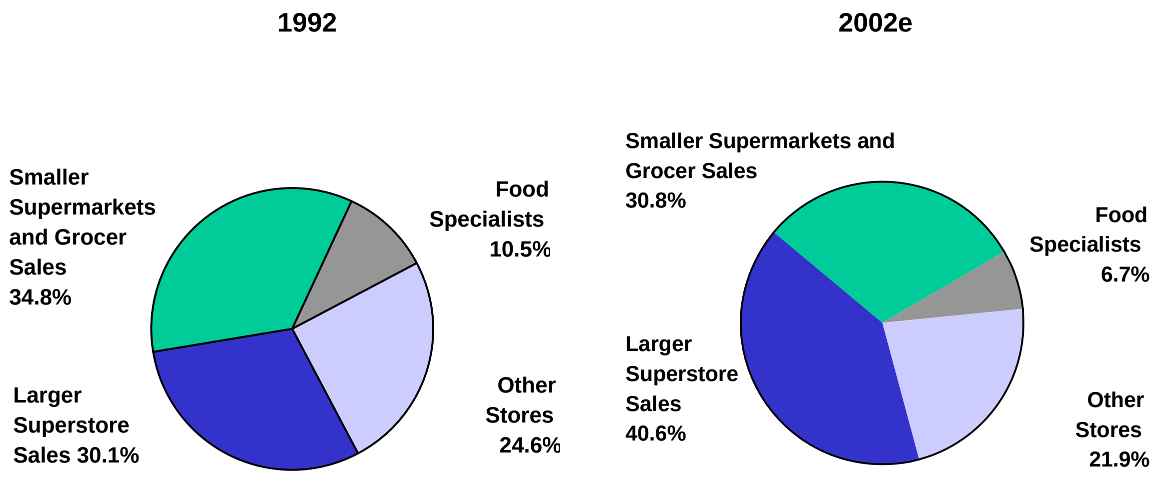
Source: Verdict Analysis

NUMBER AND SIZE OF SHOP UNITS

3.5 National retail trends indicate a continuing contraction in the number of shop units. Total store numbers in the UK have declined by 11% over the last 10 years. This masks variations in the decline of different types of stores and different locations. For example, with the emergence and growth of superstores during the 1990s, there has been a decline in the number of smaller and more specialist food retailers. The number of food specialists has declined by 19% from 48,301 in 1992 to 39,131 in 2002, whereas the number of large superstores has increased by 50% from 860 in 1992 to 1,292 in 2002. One consequence of this trend is that there has been a drop in demand for small shop units, which are a particular feature of many traditional local and district centres.

3.6 As illustrated in Figure 3.3, between 1992-2002 leading supermarket multiples increased their share of the grocery market, as a result of the success of the superstore format. Superstores now account for more than £2 out of every £5 spent on grocery in the UK.

Figure 3.3: Grocery Market Component 1992-2002



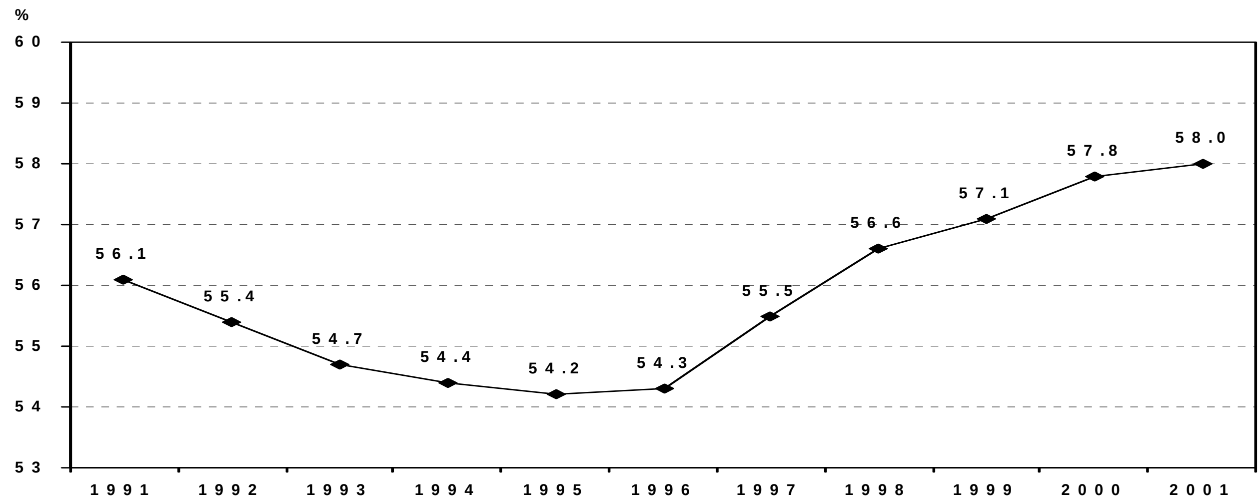
Source: Verdict Analysis

3.7 Certain specialists have suffered more than others. The fishmongers' share of the total grocery market has declined from 0.5% in 1992 to 0.1% in 2002. Butchers have also lost nearly half of their market share, declining from 4.1% to 2.2%. Both types of retailers have been affected by the improved quality and service at superstores for meat and fish. Greengrocers, bakers and other specialists have been slightly more robust, yet all three have lost market share. The competitive effect of superstores on local shops is likely to continue in the future despite planning restrictions on new stores, as they will continue to innovate spotting market trends and adapting their operations accordingly.

3.8 Whilst the share of sales has drifted towards the out of town retailers, the high street increased its share of stores selling comparison goods in the latter part of the decade. This is largely as a result of Government policy (Figure 3.4). This trend looks set to continue, particularly with the virtual end of the development of large out of town regional shopping centres and the focus instead on town/city centres schemes such as the recently opened Bullring in Birmingham, and Exchange Square and the proposed extension to the Arndale Centre in Manchester.

3.9 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 (discussed below) 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.

Figure 3.4: High street outlet numbers - share of all outlets 1991-2001



Note: High street figures include out-of-town shopping malls such as Bluewater

Source: Verdict Analysis

POLARISATION

3.10 Alongside the re-emergence of the high street there is a continuing polarisation by retailers towards larger schemes in larger centres. CB Hillier Parker's 'National Survey of Local Shopping Patterns' shows that the top 70 centres in the country now attract over 50% of the country's population for comparison goods shopping. There is therefore a concentration of comparison goods retailers in a smaller number of larger centres where they can more easily serve larger catchments. This trend looks likely to be reinforced by new development particularly in shopping centres and malls – for example, Manchester City Centre has benefited significantly from the redevelopment of the retail core, placing it amongst the top five centres nationwide in retail terms. Almost half of the shopping centre floorspace in the development pipeline is destined for these same 70 centres.

3.11 This concentration of retailing in larger centres will to a certain extent alter the dynamic between the city centre and the district and local centres. This will particularly be the case where development has not occurred, or has been too small scale to increase significantly the range and quality of shopping (Gorton and Openshaw are examples of this). Conversely, where significant investment has been made (e.g. Hulme, Sport City), is being made (e.g. Harpurhey) or is about to be made (e.g. Cheetham Hill), centres are likely to remain much more capable of performing an effective role.

3.12 The challenge now is to ensure that PPG6 and emerging PPS6 continue to be used as positive tools in seeking to direct development to centres – but in particular to those centres that have so far failed to attract meaningful levels of investment. Defining and maintaining an appropriate network of centres is important in providing the framework within which this can be achieved.

NEW TECHNOLOGY

3.13 The advent of new technology such as internet or digital television home shopping is unlikely to have a universal effect on retail expenditure. Certain sub-sectors are likely to be more affected than others, as the internet has particular attraction for certain types of retailing, including books, CD's and high value electrical goods. Verdict Analysis indicate that many of the high street's key national multiples are developing multi-channel strategies that combine the technology of the internet with the brand power of their stores. Examples include WH Smith and Boots. Verdict Analysis suggest that the 'clicks and mortar' approach could further increase the concentration of markets. Centres that offer a range of complementary, non-retail attractions and/or offer a high level of convenient shopping facilities are likely to be more resilient to these changes. Again, this is relevant in the Manchester context, especially for some of the stronger district centres.

3.14 In the convenience sector it is considered that internet shopping is unlikely to have a significant effect on local centres in the future. Although Verdict predict that growth will be fuelled by the increasing "savviness" of consumers, as growing numbers of (particularly) women and older people become more confident in ordering on line and ordering is speeded up by broadband, overall they forecast that this will not have a significant effect on sales. Verdict predict that on-line sales will increase from £1.4bn in 2001 to £5.3bn by 2007, but this will still only make up 4% of all grocers' and food specialist sales. Most food retailers service on-line sales from their stores, so even if there is growth in on-line sales in the future, this is unlikely to lead to store closures.

Non-Food Retailers Fascias and Formats

3.15 Changes are occurring in the traditional 'high street' fascias as evidenced by closures and rationalisation and the emergence of new retailers. Operators such as Arcadia, whose high street fascias include Top Shop/Top Man, Burton, Dorothy Perkins, Evans and Warehouse have recently rationalised and reduced the number of outlets across the country, although this has now levelled out and their latest financial results suggest something of a recovery. In the last year whilst Arcadia's total turnover grew by a relatively modest 3.3% and like-for-like sales were up 2.5%, crucial profit margins jumped a full 2.6 percentage points.

3.16 Other traditional high street favourites have also experienced problems. C & A have withdrawn from the UK, whilst trading difficulties at M & S led to a dramatic cutback in their development programme and a concentration on re-branding of products. This has contributed to a strong and much needed improvement in the firm's fortunes. New retailers are also emerging and becoming well established, including the international fashion stores such as Mango and Zara. They are however only seeking representation in larger centres.

3.17 More generally, there has been a marked expansion in the value-orientated sector, including operators such as the clothing retailer Primark which has increasingly moved away from sites in more secondary locations to higher profile sites in town centres. Other mainstream value orientated retailers expanding their portfolio include Peacocks, Poundstretcher, WEW and Brunswick. Many of these 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. They also often recognise the benefits of trading together (sometimes with discount foodstores) both in and out-of-centre. Overall, this sector is a key growth area offering opportunities for the district centres in Manchester, in particular the larger district centres and those with a less affluent catchment profile. The letting to Wilkinson of the largest unit to be created in the redevelopment of Harpurhey district centre is an example of this.

3.18 As a reaction to the growth in value retailing, middle market operators are segmenting their offer further, providing either more upmarket own brands such as Per Una and Blue Harbour in Marks and Spencer or more heavily discounted offers within stores such as New Look. Diversification into other sectors is also occurring, particularly into homewares. For example Next and Monsoon are placing greater emphasis on 'interior' products.

3.19 The space requirements of retailers on the 'high street' and particularly in shopping centre locations are also being reconsidered and increasingly operators are requiring larger footprints. Next, for example, is favouring larger units and the latest unit planned for the extension to the Arndale Centre in Manchester will be their largest (c. 14,000 sq m – see also discussion below), acting as a significant anchor store in its own right. Similarly operators such as H&M and Zara are requiring large footprints in order to be able to compete with one another, and with off centre locations. Such stores showcase extensive product ranges and provide an attractive, modern shopping environment. However, most of the existing floorspace in district and local centres in Manchester (and elsewhere) is not suited to satisfying this type of demand.

3.20 In the department store sector, there has been a general renaissance as the age profile of shoppers has changed to a different 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 (e.g. in Birmingham) 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.

3.21 Manchester has proved to be particularly adept in this regard, and has benefited from recent substantial investment in the department store sector, to complement its largest, flagship store Kendals ("The Harrods of the North"). For example:

- New (September 2002) Selfridges store on Exchange Square. Occupying 120,000 sq ft of the M & S building, Selfridges trades off five floors, each one individually designed by an internationally renowned architect.
- Adjacent to Selfridges, new (August 2003) Harvey Nichols store. Trading off three floors, this 95,000 sq ft store combines Harvey Nichols' trademark designer fashion and destination food and restaurant offer with unique features such as the country's first-ever in store cosmetic dental spa, and benefits from a distinctive interior designed by Four IV.
- The world's largest Next store. The Arndale Centre is to be transformed by a £150 million development programme. A northern extension to the centre, planned to open in phases from Christmas 2005, will provide an additional 300,000 sq ft of lettable space, anchored (as discussed above) by a four storey 14,000 sq m "department store" for Next – their first venture into this market.

3.22 This combination of new and refurbished department store space, cutting edge architecture, and a new entrant pursuing a department store type format, will be instrumental in firmly cementing Manchester's position as the shopping capital of the north west.

3.23 Increasingly traditional 'high street' retailers are seeking to diversify their formats and provide out of centre facilities. For example, in the last few years Woolworths has introduced Big W stores selling a range of home related products. Boots and WH Smith are also investing in out of town retail park stores, although they are finding it difficult to differentiate their offer sufficiently from their high street stores, and on the whole sell a greater proportion of lower ticket items. Clothing and footwear has also been moving away from the high street and onto out of town retail parks over the last 10 years. Next, for example, is focusing on out of town development, using the Directory and on-line products to stock the larger format, and Matalan has expanded aggressively.

3.24 National, regional and local planning policy can be expected to be framed so as to continue to resist the development of ‘high street’ type comparison goods in out of centre locations, in line with long-established PPG6 objectives to sustain and enhance town centres and to reduce adverse impact from out of centre development on existing centres. This policy of restraint may create opportunities to secure ‘quasi retail park type’ developments within or on the edge of defined district centres in Manchester where they offer the retailers prominent, highly accessible sites, although it will still be necessary to demonstrate they are of a scale and form that is appropriate to the needs of the catchment, and meet the other requirements of planning policy.

3.25 In the mainstream retail warehouse sector, 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. Moreover, there is increasing specialisation within the DIY sector, reflected in the proportion of non-retail trade sales varying significantly from Homebase and Focus which cater almost entirely for DIY enthusiasts, to B & Q Warehouse and the Wickes brand, where the proportion of trade sales is much higher.

3.26 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.

3.27 Another key feature of the wider retail warehouse market is the 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 modern requirements. Certain types of retailers, such as those selling electrical goods, now demand significantly larger units than 10 years ago.

3.28 Single unit, ‘first generation’ retail warehouses are generally not favoured by operators 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. As retailers vacate outdated premises, it is 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 Retailers, Fascias and Formats

3.29 The leading foodstore operators are continuing to innovate to increase their market share. Some have developed smaller store formats such as Tesco Metro and Sainsbury's Local and been more innovative in their town centre proposals. There has also been a growth in 'forecourt' retailing, operated either by the large supermarket chains or the major oil companies such as Esso, BP and Shell. Whilst operators are likely to seek forecourt stores in local centres in the future, the smaller format stores are largely focused on particular niche markets, such as the City Centre lunch time trade and more affluent catchments. For example, Manchester City Centre has seen the arrival of M & S Simply Food on Moseley Street, Tesco Metro on Market Street, and Sainsbury Central on Whitworth Street. As such, these formats are only likely to come forward in a limited number of district or local centres – in Manchester, these have included Tesco Metro in Northenden, and M & S Simply Food in Didsbury.

3.30 The pressure for larger superstores and hypermarkets such as Tesco Extra and Asda Walmart will continue in the future, particularly through the expansion of successful out of centre foodstores. This follows the significant expansion of superstore floorspace by store extensions, especially over the last three years, and greater diversification into non-food lines in the face of slow growth in convenience spending. With foodstores tending to underpin the role of district and local centres, the cumulative impact of these superstores may undermine smaller centres over a number of years. Any further proposals for expansion of existing out of centre convenience stores must be considered in terms of need, the sequential approach and impact.

3.31 Equally, there is evidence that the leading grocers are more active in considering district and town centre sites for superstores that present greater challenges in terms of assembly and development, and in market terms may be situated in more marginal locations, but may be more acceptable in retail planning terms. Tesco's interest in Cheetham Hill is a good example of this, whilst elsewhere in the conurbation the proposed introduction of Morrisons at Whitefield (Bury) is also representative of this trend. As opportunities to increase market share through store development become increasingly scarce, superstore operators will become more active in seeking to secure these “difficult” sites, and this may represent an opportunity to attract investment to lower order centres.

3.32 A further major change will arise from the takeover of Safeway. This could lead to either the consolidation of the main food retail sector into four key players, or the rapid introduction of a new player. The latter option now seems much less likely, with a takeover by Morrisons now the clear favourite, and moves towards the required sell-off of a limited number of Safeway stores progressing.

3.33 The discount retailers also continue to seek opportunities to expand their networks. To a certain extent their offer complements existing district and local centre facilities. For example, Aldi only sells a more limited proportion of the lines that would be available in a larger superstore, operates out of comparatively small units, and does not offer facilities that may be found in local centres such as specialist butchers, bakers or fishmongers, or other non-food facilities such as a drycleaner, pharmacy or post office. In addition, their operating hours are not usually as extensive as those of superstores, as they are not open on Sundays and do not have late night opening. As such there could be more of a role for their presence within the local centres, to complement existing convenience outlets.

PHARMACIES

3.34 The position of community pharmacies in local and town centres has been relatively protected and little change has occurred in numbers since 1987. The Office of Fair Trading’s (OFT) Market Investigation Report attributes this to regulations which seek to control entry to the market. Currently the regulations only give pharmacist’s dispensations to provide NHS prescriptions where they satisfy health authority requirements that their services are ‘necessary or desirable’ for a local area.

3.35 Despite the relatively small change in actual community pharmacy numbers, the dynamics of the market have changed markedly. Since 1990 ‘Superdrug’ have entered the market and they and other existing national pharmacy chains (notably Boots) and supermarkets (in particular) have significantly increased their market share in this sector.

3.36 In January 2003, the OFT recommended to the Government that there should be a deregulation of pharmacies thereby allowing all registered pharmacies with qualified staff to be able to dispense NHS prescriptions. This could result in significantly more pharmacies in supermarkets, and thereby impact on traditional outlets. Research commissioned by Lloyds Pharmacy in January 2003 showed that, at present approximately 6,000 pharmacies across the country are located within the catchment area of two or more supermarkets and therefore they are potentially threatened. The New Economics Foundation consider these pharmacies to be at threat, should deregulation occur. They state that, "this could translate to as many as 145 pharmacies being lost in an urban area such as Birmingham" (New Economics Foundation, 2003, p3). We would expect a very similar picture to apply in respect of the Manchester area.

3.37 In July 2003, the Department of Trade and Industry announced a new package of measures and proposals to boost local access and raise the quality of services of pharmacists. In response to the OFT (January 2003) report, Patricia Hewitt, the Secretary of State for Trade and Industry stated, "we do not believe that simple deregulation is the best way to achieve our aims. The OFT made a strong case that the current control of entry rules impede competition and reduce benefits for consumers. But given the shortage of pharmacists, and the Government's desire to see pharmacies given a new and strong role in the modern NHS, the Government does not believe that this is the time to move to a fully deregulated system. It therefore intends to move cautiously in the direction recommended by the OFT".

3.38 The package of measures includes:

- In considering applications from new pharmacies, or pharmacies wishing to extend service provision, the Primary Care Trusts will consider the impact on consumer choice;
- Pharmacies providing a full and prescribed range of services appropriate to local needs, wishing to locate in shopping developments over 15,000 sq m or intending to open for more than 100 hours a week will be exempt from control of entry requirements;
- Control of entry requirements will also be reformed in order to make them more business friendly, and provide more certainty and reliability.

3.39 In addition to the DTI response, the Department of Health published 'A Vision for Pharmacy in the New NHS' which is a strategy consultation document setting out proposals for pharmacy in the future. Furthermore, the Department of Health has been working on a new national community pharmacy contractual framework, which aims to improve the range and quality of services that community pharmacy offers to patients and to support the integration of community pharmacy in the NHS. A consultation document on how the package of measures will be implemented was published in July 2003 and consultation and agreement on new contractual arrangements followed by necessary legislation for implementation is expected winter 2003/spring 2004.

Post Offices

3.40 Britain has one of the most extensive post office networks in Europe and 94% of people are within a mile of one of them. Research by the New Economics Foundation indicates the importance of the local post office branch, for example as a focal point for social interaction, information about job and community services, financial transactions and advice. Services are especially valued by the disabled, those without a car, those over 65, carers and one-parent families. In urban deprived areas, post offices are also the main source of cash and in many cases double as the only store providing an important source of food and basic items for local people. The role of post offices in maintaining local economies is emphasised by the New Economics Foundation; once people have cash in their hands, they will more often choose to spend it in local shops.

3.41 Despite the extensive network of post offices, the New Economics Foundation reported in December 2002 that the number of branches in the UK has been in steady decline of around 2-3% a year for the last ten years as the service has been rationalised. In 1981, there were 22,000 post offices in Britain, by April 2001 this had fallen to 17,846. According to the Financial Times, Britain lost 547 post offices in 2001, 112 of which were in urban centres. More recently, similar tends have been continuing, but definitive data is not currently available.

3.42 The automation of services (i.e. direct debit payment methods and banking transfers) has reduced handling fees, which Post Offices rely on for revenue; the lack of suitable replacement sub-postmasters/mistresses when they retire; and reductions in shoppers in local centres have all contributed to increasing the number of post office closures. The New

Economics Foundation stated that "where the supermarkets draw away shoppers, the post office goes too. If one end of these businesses comes under threat, either the retail or the post office – the community risk losing both institutions for good"(New Economics Foundation, 2002, p20).

3.43 Despite the Government announcement in December 2002 that £450 million would be received by the Post Office in return for keeping rural branches open, and grants of up to £50,000 will be given to urban post offices in some of the poorest areas to make them viable and prevent closure, the Government and industry observers said that this would not prevent further closures (New Economics Foundation, 2002, p21). The Post Office also announced in February 2003 that 3,000 urban branches were to close under the urban reinvention programme over the next three years, so the trend outlined above is set to continue.

Banks and Building Societies

3.44 Barclays, Lloyds TSB, HSBC and RBS Natwest, known collectively as the 'Big Four', account for over two thirds of all private current accounts in Britain and have a virtual monopoly (89%) over small business accounts (New Economics Foundation, 2002, p23).

3.45 Rationalisation by the 'Big Four' has contributed to many branch closures, and technological advances through the emergence of telephone and internet banking; competition from branchless banks (the average cost to the bank of a transaction in a branch is twice as much as that conducted over the telephone); and the availability of banking services through post offices have impacted upon bank and building society branch numbers.

3.46 During the 1990's the number of high street bank branches fell dramatically - Britain lost over a quarter of its branch network. Between 1988 and 2000 the number of bank branches fell from approximately 17,500 to 12,000, with more than 3,500 bank branches closing between 1995 and 2000. The British Bankers Association reported that well over 150 bank branches were closed in 2001, with Lloyds TSB (74), Barclays (35), Halifax (22), HSBC (19) and Bradford & Bingley (11), responsible for the majority of them. In addition the Building Societies Yearbook reported that 200 Building Society branches disappeared from the high street between 2000 and 2002. Deloitte Research estimates that the termination programme will continue and a further 3,600 bank branches will close by 2005. (New Economic Foundation, 2002, p23).

3.47 The British Bankers Association piloted a scheme throughout 2002 in ten communities, to allow customers to make withdrawals and exchange notes and coins through a competitor's bank branch. A feasibility study for a national branch sharing scheme has also been produced (March 2003) and further reports and announcements are expected back from the banking industry in due course regarding the future for branch sharing.

3.48 Abbey National has already undertaken a branch sharing scheme of its own. Costa Coffee bars have been incorporated in several branches and other outlets have been set up in Safeway and Homebase stores. Abbey National and WH Smith have also been reported to be considering a similar move. The decline in the number of bank and building society branches has been paralleled by an increase in the number of ATMs, which enable customers to withdraw money from their accounts 24 hours per day. The presence of suitably located ATMs is becoming an important factor in the success of commercial areas.

FOOD AND DRINK

3.49 There has been a dramatic increase in the number of food and drink uses in town, district and local 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.

3.50 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. However, 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.

3.51 In the pub trade, local provision has come increasingly under pressure. Business analysts KeyNote have reported that the number of pubs has fallen by 6.5% since 1990 (New Economic Foundation, 2002, p18). This has also been reiterated in an announcement by the Campaign for Real Ale (CAMRA) that 20 pubs close every month. The worst affected are traditional pubs and inns which have lost customers due to young drinkers' preference for large, urban theme pubs and wine bars which may cause amenity problems if located in close proximity to residential areas. Whilst in rural areas there is often much demand for pubs to be converted to residential uses, in more secondary parts of towns, plus local and district centres, closed pubs often remain vacant for considerable periods of time, detracting from the overall environment and becoming increasingly dilapidated.

3.52 The planning policy implications of the increase in A3 premises in centres, and in particular hot food take-aways, is considered in more detail in Section 4, below.

Asian and Ethnic Retailing

3.53 Asian centres often provide a retail offer which meets almost all of the needs of the local population in a single destination, for example providing outlets for ethnic foods and clothes, as well as providing professional services such as lawyers and accountants. Often Asian centres become a focal point for ethnic minorities over a relatively wide area.

3.54 Most Asian retail centres do not have a transparent market. Businesses tend to be family run and in freehold ownership with the majority of property deals not being reported in the market, and therefore property market information is very limited.

3.55 Asian/ethnic retailers tend to be single unit shops run as a family business serving predominantly Asian/ethnic communities. However, over the last 3-5 years a number of retailers have begun to open stores in more than one location. These stores tend to be designer (fashion) outlets but are still run by families in predominately ethnic areas. Daminis, which could be described as the first Asian multiple retailer, is providing a brand name and image of designer clothing. Other retailers such as Chiffons seem to be pursuing a similar strategy. Again the retailer is targeting the Asian designer clothes market by providing a brand/designer name which the market can associate with.

3.56 Although the expansion of multiple retailers across the UK ethnic centres is likely to be slow, retailers within India have begun to forge international ties, focusing on the UK, USA and Canada. Retailers such as Khubsoorat have outlets in New Delhi, Sparkhill (Birmingham) and Green Street (LB Newham); others include Benzer who have outlets in Harrow and Delhi, and Frontier fashions who have stores in India (Punjab) and Canada. Other retailers in the Indian sub-continent, such as Kulthams and Lakshmi do not have shops under their own names but have developed links with smaller retailers in the UK and Canada to display and supply their goods, as well as allowing customers to pick up clothes they may have ordered while on holiday in India. Asian retailers have also begun to embrace technology, with stores such as Benzer opening up sites on the Internet. Retailers such as Roopam, the international mail-order company, based in Bombay, are following suit.

3.57 Asian retailing will continue to be dominated by the family run business. However, the next generation is beginning to incorporate the quality (of shopping environment) associated with national multiples with the personal services of the individual retailer and therefore they may soon be breaking into the mainstream retailing centres. In addition many second/third generation Asians, born in Britain, are more likely to shop in the usual range of national multiple retailers common to most high streets. There may therefore be a gradual erosion of the sharp distinction between Asian and mainstream retailing which currently exists, but this is likely to be a slow process, and there will be a continuing demand for shops providing goods and services to meet the needs of specific communities. This will provide a continuing opportunity for some centres to 'specialise' in this way, with a few having the potential to develop a 'more than local' role.

3.58 As well as their representation within district centres, different ethnic groups establish through time new or revived concentrations of retail and service provision, either as an extension to an existing centre, or a separate cluster. This may arise as new groups become more established within particular areas. Examples include the revival of Sparkbrook in Birmingham partly through the growth of Somali businesses, and in Manchester the section of Cheetham Hill Road to the south of the defined district centre itself, which has grown in popularity.

Co-Ops

3.59 The Co-operative Group, established in 2001 from the merger of the Co-operative Wholesale Society (CWS) and Co-operative Retail Services (CRS) accounts for approximately half of the movement's turnover, and ranks amongst the 10 largest retailers in the UK by sales. The Group has significantly strengthened its position in the local retail market with the 2002 takeover of the 630 outlet Alldays convenience store chain, for integration into the Co-op format. Other operators (GT Smith and Williams) and a number of individual stores (from Costcutter, Londis and Spar) were also acquired in 2002. This followed a strategic review in 1997, when the CWS decided to pursue neighbourhood and small town locations, and withdraw from off centre superstores.

3.60 As a consequence of these moves, the Group has become a strong player in the neighbourhood convenience retail sector, albeit less so in the wider grocery market, and on the back of this now ranks as the eighth largest grocer in the UK. Whilst overall sales growth has been disappointing due to the withdrawal from superstores, like for like growth has been healthy.

3.61 A number of the Group's other business lines are also represented in Manchester and the Greater Manchester area. These include department stores, Shoefayre stores, bank branches and insurance offices, travel agents, pharmacies and funeral services. Manchester is also home to a wide range of head office functions, further underlining the importance of the movement to the City.

SUMMARY

3.62 In order to define and apply appropriate standards of provision to local food shopping and other retail and services, it is necessary to consider the wider national context, as well as the trends likely to influence the distribution of retail and leisure activity in the Manchester conurbation over the next decade and beyond.

3.63 Many of these trends indicate that there will be a continued challenge to the role of local and district centres over the next few years, in particular as a result of:

- A likely slowdown in the rate of growth in retail sales;

- A continued decline in the number of shops and lack of demand for small shop units, as multiple retailers continue to seek larger premises;
- Continued polarisation of comparison retail sales to larger centres;
- The effects of e-commerce;
- Continued pressure from the major food retailers for new or expanded superstores;
- Continued decline in the number of post offices;
- Continued reductions in bank/building society branch networks;
- Continued decline in the number of public houses, with demand focusing on large themed bars.

3.64 Areas which may present opportunities for local and district centres include:

- Planning restrictions on out of centre retailing may create opportunities for quasi retail park developments in or on the edge of some centres;
- Value-oriented comparison retailing is a growth area, which may provide opportunities for larger local centres and those with less affluent catchments;
- Small format convenience stores operated by the main grocery retailers and to a certain extent by the Co-op may be a growth area, but only in selected locations;
- The pursuit of more challenging in-centre sites for superstore development;
- Discount foodstore operators continue to seek expansion and are often well suited to district centres;
- Continuing demand for shops driven by business people from within particular minority ethnic communities;
- The increased focus of the Co-op on neighbourhood convenience retail.

3.65 There may also be significant scope for the strengthening of the role of selected district and local centres where other, non-retail uses can be expanded or improved. In particular, our analysis of the Manchester centres suggests that improvements in health provision (e.g. new surgeries) or education (e.g. improved libraries or schools) could be significant.

3.66 Our case studies of the Manchester Centres suggest that their role and composition has continued to evolve in response to national and local factors. In addition to the reduced demand from traditional high street comparison multiples for such centres, their floorspace stock is often comprised of smaller, more dated units which are not always well suited to the demands of modern retailers. Higher levels of vacancy and churn of retailers tend to be particularly concentrated in more secondary areas, as district and local centres have contracted. We comment on this in more detail in Section 5 of this report, when setting out the action plans for each centre.

3.67 An important conclusion of our analysis of national trends, as well as our case studies in Section 5 is that it remains of critical importance to maintain and improve the food retail offer of many of Manchester's district and local centres. Food shopping underpins the role of the centres, and where stores are well integrated and have an appropriate size, offer and function, this creates the potential for linked trips with other convenience, comparison and service uses. While this should continue to be the mainstay of Manchester City Council's strategy for its local and district centres, it will also be important to encourage diversity, and the development of specialist/niche retail functions, and to work with the growing demand for theme pubs/bars which may be a realistic option in some centres.

3.68 But, above all, it is crucial to understand the diversity of the centres – and therefore to avoid the 'one size fits all' approach to analysis. This may mean that the future strength of some centres is built around non-retail (service) improvements, rather than trying to focus exclusively on changes in convenience retailing which cannot necessarily be sustained in all locations in the long term.

4. BUILDING TOWARDS NEW POLICY APPROACHES FOR CENTRES

4.1 The Manchester UDP sets out policies relating to the city centre's role and function and clarifies that the Council 'is committed to maintaining and enhancing district shopping centres so that they remain the focus for the provision of shopping facilities as well as the full range of community facilities. The Council wishes to see these centres continuing to benefit from investment and, where necessary, renewal'.

4.2 At the local level, this policy position is reinforced by the following text of the UDP Statement, that the Council 'wishes to ensure that good quality local and convenient shopping facilities are within easy reach of peoples homes'.

4.3 There are strong underlying themes of 'change' and 'improvement' expressed throughout the UDP's policies. A summary of these is set out below – and highlighted in bold are those elements of policy which are (or have already been) particularly significant in changing the nature and influence of individual district and local centres within Manchester.

Summary of UDP Policies

(1) Enhancing Shopping Provision
The Council will seek to enhance shopping provision by:- • Working with the private sector to improve the City Centre environment for shoppers • Working with the private sector in district shopping centres to improve safety, upgrade the environment, tackle traffic problems and increase economic viability • Replacing Moss Side shopping centre with a large supermarket and other local shops • Protecting and enhancing the City's market trading areas
(2) Further Shopping Provision
In terms of further shopping provision the approach will be:- • Encouraging new shopping development to serve local shopping needs where current provision is inadequate • Carefully controlling the location of major new shopping facilities so that they do not undermine the ability of existing shopping centres to be improved and to ensure that they are highly accessible and acceptable in terms of environmental and traffic impact • Ensuring that all major shopping developments provide a range of facilities such as access for disabled

people, baby changing and feeding facilities, toilets and cycle parking facilities.

4.4 Within the UDP, there are a number of ways in which the first of these ‘highlighted’ policies are given special consideration, through a proposed particular emphasis on improving safety, enhancing environmental quality, tackling traffic problems and increasing economic vitality – in the following centres:-

- Beswick
- Cheetham Hill
- Gorton
- Harpurhey
- Levenshulme
- Longsight
- Newton Heath
- Openshaw
- Wythenshawe

4.5 Changes of considerable significance have taken place since the UDP (1995) was published. Of the centres listed above, Beswick is no longer defined as a district centre – and has now been replaced by Sport City, whilst Moss Side has indeed been replaced. Others, including Cheetham Hill and Longsight are all in our view witnessing some positive signs, though each has scope for considerable further improvement, and each should now be seen as having the potential to become amongst the city’s more effective district or major district centres. Other centres – such as Chorlton, Sport City and Didsbury – also function as the strongest district centres, as explained in our Stage 1 report. On the other hand, Gorton, Openshaw and Newton Heath continue to face major challenges, and, at present, would be categorised as having a much more minor district centre role, with their future status and function potentially at some risk, unless new environmental, management and development related initiatives are undertaken urgently.

4.6 It is also significant that the current UDP recognises that new development (in district centres) will be ‘particularly welcome where it replaces obsolete shopping facilities and is in keeping with the character of the existing centre’ – and, building on our comments on district centre viability set out in our Stage 1 report, we have framed our district centre Action Plans accordingly.

4.7 In certain respects and in today's context, the policies set out in the UDP seem slightly incomplete or out of date in that, whilst they contain many sound criteria against which proposals can be judged, and also have a number of site specific and 'positive' recommendations, there is less emphasis on setting out a range of positive policy initiatives, directed specifically towards new development, environmental improvement and new management initiatives. It is this change in emphasis – focusing on these new directions – which is addressed by our district centre Action Plans, which follow in the next section of this report.

4.8 New policy directions for the district and local centres in Manchester are therefore needed, in part to reflect the emerging national policy background (to be reinforced in the new PPS6) and also to take full account of the changes to retail and service provision across the city's district and local centres during recent years. Overall, it is particularly important to see these new initiatives as being directed towards more than just 'new retail floorspace' – hence the direction and spread of policies reflected in our Action Plans.

Broad Policy Approaches

4.9 In the remainder of this Section, we comment on the issues which we consider to be of relevance to the evolution of new policy guidance for Manchester's district and local centres. We deal with this commentary under eight main headings as follows. These themes are reflected within the individual Action Plans.

Broad Policy Approaches – Key Topics to be Addressed in Action Plans
1. Implications of the new centre hierarchy (NB: this is *not* a retail hierarchy)
2. Issues relating to development priority areas
3. Centre boundaries

4.	Development needs and opportunities
5.	Environmental improvements
6.	Management initiatives
7.	Hot food take-aways and A3 uses
8.	New convenience shopping (within the city centre, in district centres and in other locations)

CENTRE HIERARCHY

4.10 The results of the Stage 1 assessment of all the district and local centres clearly point to a need to review and update the defined hierarchy for centres in the Manchester area. It must be emphasised that this should not be seen, in the future, as simply a 'retail' hierarchy. There is definitely a need to consider all the centres in a broader sense, not merely examining their retail role and function. Thus, combining our analysis of retail and other facilities, we have concluded that there should be three groupings or 'bands' of centres, namely:-

- Major district centres – our analysis suggests that Chorlton, Sport City, Levenshulme and Didsbury fall within this banding;
- District centres – Cheetham Hill, Harpurhey, Hulme, Longsight, Newton Heath, Northenden and Wythenshawe; and
- Minor district centres – Fallowfield, Withington, Gorton, Rusholme and Openshaw.

4.11 Among the issues we have factored into our assessment, leading to the selection of these three tiers of district centres, have been 'non-retail' factors such as accessibility to other services; wider social inclusion issues; environmental quality (or its absence); the evening economy; and the extent of 'focus' or definition within the relevant centre.

4.12 In simple terms, the approach taken in arriving at this classification reflects the underlying assumption that a combination of retail based and social inclusion based factors can be used to measure the extent to which centres are able to contribute towards creating sustainable communities. This relationship is important because it enables us to monitor the performance of centres and assess the success of initiatives implemented to sustain and enhance them. The meaning of this is explored in some detail below (section 6).

4.13 It is neither realistic nor desirable to aspire to every district centre becoming "major". However, the classification is particularly helpful in two regards. Firstly, the "minor" district centres include some of Manchester's worst performing centres, and the aim should be to elevate them to "district centre" status. Secondly, whilst most of the "district centres" are – broadly – adequate in terms of their role and function, there is a requirement to upgrade their performance to meet the needs of local people more fully. The long term policy goal should, therefore, be to create centres that can be classified according to a two-tier hierarchy, comprising "major district centres" and a group of "district centres" achieving a better and more effective overall performance than that which currently characterises this classification. The indicators that may be used to measure this transition are again discussed below (section 6).

4.14 Beneath this three-tier structure defining the district centres and the relationships between them is a further grouping of 22 local centres. Two questions arise out of this – first, whether any of these warrant reclassification as a district centre, and second, whether any are failing to perform their function to such an extent that they should be declassified altogether. The answer to the first point is no – none of the local centres examined perform a role that in our view justifies their elevation to district centre status. However, the answer to the second point is more complex.

4.15 The analysis carried out for the stage 1 report included an evaluation of the local centres according to PPG6 criteria, conducted on a functional and qualitative basis. In functional terms, we looked at the provision of basic facilities, including a newsagent, grocers, post office, pharmacy, hairdresser and other small shops of a local nature. The poorest performing centres in this regard – those lacking two or more uses within the newsagent, grocers, post office and pharmacy grouping – included:

- Levenshulme: Kingsway / Slade Lane – lacks a post office and a pharmacy

- Longsight / Rusholme: Dickenson Road / Anson Road – lacks a newsagent, grocer and post office

- Moss Side: Claremont Road – lacks a post office and a pharmacy

4.16 In this context, and on the basis of the relationship between these and other centres, we recommend that careful consideration be given to removal of local centre status from Claremont Road, possibly in conjunction with designation of a new local centre as part of the Maine Road stadium redevelopment (see discussion of relationship between this initiative, housing area renewal, and sustainable communities, in section 6). Equally, consolidation of Kingsway / Slade Lane and Dickenson Road / Anson Road into a single local centre should be considered.

4.17 Notwithstanding the functional analysis, it is also important to consider the extent to which the quality of each local centre inhibits its ability to perform a meaningful role. For example, in purely functional terms, Hyde Road / Reddish Lane in Gorton provides each of the uses typically associated with a local centre. However, the centre is disjointed and lacks focus, there is a high vacancy rate, and the quality of provision and accommodation is extremely poor in places. Similarly, Ashton New Road / Manchester Road in Clayton also provides each type of use, and offers two supermarkets, but is again disjointed, divided by Edge Lane, with some facilities in Manchester and others in Tameside, and poor quality accommodation in part.

4.18 We do not consider that the qualitative shortcomings in these and a number of the other local centres suggest they should be downgraded and removed from the retail hierarchy. Rather, through application of the policy approaches outlined below, the strategic aim should be to improve these centres in a way that will enable them to perform their role and function more effectively.

4.19 The next level down the retail hierarchy, including very small groupings of shops and parades below local centre status, has not been examined by this study. However, the lack and poor quality of provision in the Miles Platting area has been recognised, and is the subject of a further study (reported separately).

Development Priority Areas

4.20 It is also important to consider carefully, in future policy formulation, the issue of 'development priority areas'. Manchester, like many regional cities and towns, has a significant proportion of its district centres located along or near to the main radial routes into the city. Yet in assessing new development in those district centres which lie along such corridors, it is also important to avoid the pitfalls of encouraging further elongation of development – i.e. there is a need to avoid new schemes which could accentuate the existing difficulties which both shoppers and other district centre users (and traders) face in helping the district centres to function in a coherent and focused way.

4.21 Appropriate policies are needed to reflect the interrelationship that exists between certain centres. In our Stage 1 report, we highlighted, for example, that there were a number of linked centres including:-

i) The Rusholme/Fallowfield/Withington area, which appears underserved in overall terms by food retailing, and also includes the three failing local centres outlined above;

ii) The Wythenshawe/Northenden area, which has poor quality food retail provision; and

iii) An eastern area, broadly defined, comprising Gorton, Openshaw, and Newton Heath / Miles Platting, where the quality food shopping and other service provision is also quite poor. The local centres in this area, notably Hyde Road / Reddish Lane, Beswick, and Ashton New Road / Manchester Road also warrant special attention.

4.22 A number of other areas, such as Oldham Road also have regeneration needs. Indeed, these and other areas are 'key areas of regeneration', and although regeneration is not a retail 'need', it is a key factor to be weighed in the balance in a city such as Manchester, and it needs to be considered when determining how retail-led regeneration can be accommodated. We would therefore propose that there should be a specific separate policy that supports retail development, where it can be demonstrated that it would support and bring forward regeneration projects within the key areas. However, there needs to be a strong caveat with any such policy which ensures that the focus remains set on 'sustaining and enhancing the defined district centres' as the first priority.

4.23 It is important to stress this point, and further reinforce that centres will remain the preferred location for retail development, and other types of development that generate a substantial number of trips. The concept of "development priority areas" is used here as a means of describing and highlighting parts of the city defined by centres or clusters of centres and the neighbourhoods they serve, that represent a priority in terms of investment and regeneration activity. This activity should be directed to the centres. Furthermore, the aim should be to consolidate and reinforce the existing focus of activity, and not create dispersed or fragmented centres.

4.24 It is therefore a policy mechanism that should be used in identifying where the priorities lie within the overall network of centres. Manchester's centres effectively compete with one another for resources, and it is important to ensure that these resources are not over stretched, and avoid conflict arising. In spatial planning terms, the definition of development priority areas will help to achieve this. A second, management, mechanism working alongside development priority areas to the same end is discussed below.

4.25 Effectively, the "development priority area" approach seeks to introduce a further level of refinement to the centre hierarchy described above. The centre hierarchy is a strategic city wide tool used to categorise the sixteen district centres into one of three tiers as a means of comparison and benchmarking, and measuring future performance. The development priority area approach then seeks to identify groups or networks of centres in particular parts of the city that should be given precedence and considered together in terms of future action for their improvement.

4.26 So, for example, the centre hierarchy identifies that Gorton and Openshaw are amongst Manchester's poorest performing district centres. The development priority area approach recognises that these centres are situated in the same part of the city, and that other centres in this area, including Newton Heath, Hyde Road / Reddish Lane, Beswick, Ashton New Road / Manchester Road, plus the underserved Miles Platting, also face particular issues. It recommends that this part of the city should be considered in a coordinated manner and (along with the other development priority areas) should receive attention as a matter of some urgency.

CENTRE BOUNDARIES

4.27 Within the Action Plans, which follow in Section 5, we also make reference to centre boundaries (and possible changes to these) in each case. Within the case studies, we have commented on how new boundaries might properly be defined, insofar as we can do so without undertaking a detailed property-by-property audit of all the potential boundary areas and all the relevant issues. Although this task does not form part of this project, as a general guide however, we consider that it is important to take into account the following:-

- New (or proposed) development that has extended (or will extend) an established centre;
- Reductions in centre boundaries, where there is sprawl or a lack of focus and definition; and
- The need for more appropriate or defensible boundaries, in policy terms, having regard to changes in specific range of uses (notably A3).

4.28 Other factors may be brought into play in redefining the boundaries of individual district centres and our comments and advice set out in Section 5 should help to define the way forward for the Council in this respect.

4.29 The definition of centre boundaries or, perhaps more appropriately, defined centre frontages, is an issue of particular importance to the local centres. One of the main problems faced by a number of the local centres is the absence of definition – no recognised boundaries exist in policy terms. As a result there is a lack of a clear focal point, the centres are disjointed, fragmented and sometimes dispersed. In functional terms they may provide the uses expected by their local population, however, by being over stretched they lack vitality and often quality, and the shopping experience may be further blighted by poor quality accommodation and extended vacant frontages. Examples of this include Worsley Avenue / Kenyon Lane, and Hyde Road / Reddish Lane.

4.30 The benefits of concentrating activity within the district centres are highlighted throughout this report, for example in terms of development priority areas (discussed above), specific opportunities (section 5), and creating sustainable communities (section 6). This may create additional pressures on local centres, and this again should place greater emphasis on the importance of delineating focused, well-defined, compact local centre frontages. A policy approach should then be pursued that will seek to direct development (either operational or change of use) to these frontages as appropriate, and encourage development elsewhere towards restoring non-centre uses.

DEVELOPMENT NEEDS AND OPPORTUNITIES

4.31 Several district centres have specific areas where future development may be encouraged and brought forward accordingly. These are described in the Action Plans that are included in Section 5 and a policy or policies should be put in place so as to give support for such development initiatives. Key centres where development needs or opportunities exist, excluding those such as Cheetham Hill and Harpurhey where major proposals are already well advanced, include:-

1. Openshaw
2. Gorton
3. Newton Heath
4. New Inner City Centre Area (Inner North/Oldham Road)
5. Wythenshawe
6. Rusholme

4.32 More detailed advice relating to these major ‘interventions’ is contained within the relevant Action Plan, set out in Section 5. Other centres may also see a variety of more minor initiatives including:-

- Chorlton – Remodelling or upgrading of the Safeway store;
- Fallowfield – Opportunity for action on land adjacent to Sainsbury; and
- Northenden – Opportunity for improvement on land to the north of the centre.

4.33 There will also be a need to consider where further ‘non-retail’ uses can be brought forward, so as to help strengthen and diversify the role, and the trade draw, of each of the city’s district centres.

4.34 A wide variety of other potential ‘development-related’ opportunities need to be tested and, insofar as we can, this has been explored within the Action Plans which follow. Among the topics which need to be kept under review include:

- Scope for expansion of non-food retail;
- Possible reconfiguration of car parking;
- Need for development of new non-retail facilities – e.g. crèche;
- Scope for reconfiguration/redevelopment of existing non-retail uses – e.g. fire station, school or library;
- Development opportunities relating to the evening economy and/or leisure sector;
- Scope for residential-led development on fringe areas, so as to provide more ‘focus’, especially for a centre undergoing ‘contraction’;
- Scope for developments to provide rationalised/improved public service buildings – e.g. health/adult education/job centres etc;
- Development of ‘gateway’ sites/features, so as to give a better identity to district centres;
- Opportunity for improved/reconfigured markets as part of comprehensive city-wide strategy; and
- Importance of linking new developments with established/adjoining retail/service areas.

4.35 This list is not all encompassing, but by including it here, it should allow city council officers (both now and in the future when they use this report) to reassess whether some or all of the measures could have an application or relevance in a particular district or local centre. The same approach has been taken with environmental and management initiatives (later in this section).

ENVIRONMENTAL IMPROVEMENTS

4.36 Opportunities for environmental improvements within district and local centres may well be constrained by budgetary and other limitations, especially in some centres. However, as we explain later in this section, we do envisage that there are opportunities for coordinated management action and delivery of improvements, a number of which will relate to the opportunities which need to be grasped to secure environmental enhancement measures.

4.37 These environmental measures will be potentially quite diverse – and will differ from centre to centre in terms of the emphasis which needs to be given to them. However, among the general themes which will need to be tested are:-

Environmental Improvements
• Measures to ensure that the centre's car parking is as safe/pedestrian-friendly as possible, and linked well to the principal centre attractions;
• Enhancement of key pedestrian routes to adjoining residential areas;
• Landscaping and seating, appropriate to the centre's role/function;
• Scope for shop front improvement grants in key locations;
• Opportunity for coordinated improvements to servicing, so as to minimise shopper/service vehicle conflicts along main shopping routes (and also helps to avoid damage by service vehicles to pavements outside principal retail attractions);
• Opportunity to create 'theme' or 'identity' for the centre;
• Opportunity to create public art features;
• Scope for creating secure cycle parking facilities/other small scale transport improvement which have a positive environmental impact (e.g. traffic calming/20mph zones); and
• Scope for improved signage as part of a coordinated streetscape strategy.

MANAGEMENT INITIATIVES

4.38 Whilst the City Council can take forward a number of new initiatives, focusing on development and environmental improvements, across a range of district and local centres, it is perhaps the management issues which are hardest to address in a coordinated and comprehensive way. This is because the individual centres are often in diverse, largely private, ownership and this can limit the potential level of commitment which can be secured to broad based initiatives. Nevertheless, we consider that a district and local centres strategy, in a city such as Manchester, should 'challenge the normal boundaries' and, in our Action Plans for the individual centres, we have therefore suggested ways in which an extensive and varied set of measures should be tested further. These are set out below, but, overriding these detailed measures there is a need for the management initiatives to be led, right across the City Council, by a 'project champion' who can take forward the strategy – and the City Council's input – in a coordinated and comprehensive way.

4.39 We therefore propose that the City Council should put in place a senior level 'project champion' to work alongside a 'District Centres Manager'. This team would take an overarching view of all the centres, across the city, focusing on district centres, but also ensuring coordination with local centres. As discussed above (section 2), one of the key concerns of the Social Exclusion Unit in their examination of shopping access for people living in deprived areas was the lack of a single body to ensure an integrated response to issues at the local level.

4.40 Two important issues arise from this. Firstly, there is the question of creating what might be interpreted as another layer of bureaucracy. However, we consider the range and complexity of issues and responses in a major urban area like Manchester is such that it would benefit greatly from the introduction of a management structure to ensure best practice is applied and efficiencies created across the city.

4.41 Secondly, this might be seen as a step towards marginalising the existing regeneration partnerships across the city. This is not the case, and it is important that the significant successes achieved through the current regeneration structure are built upon. Rather, the objective is to ensure that the benefits of lessons learnt and successes achieved at the local level can be shared across the city, and that resources are prioritised and applied in the most efficient manner. It may be appropriate to recruit the District Centres Manager from a retail or property background, to complement the regeneration skills already in place.

4.42 The responsibilities of the District Centres Manager would include, for example, driving the public sector elements of project delivery forward, forging partnerships with occupiers/owners/retailers in key centres and generally acting as the advocate on a day to day basis, so as to market and promote all development (and other) opportunities in district and local centres. The District Centres Manager would also serve as the principal point of coordination with other agencies such as NEM, and seek to lever in private investment and other funding.

4.43 A further important aspect of the role would be to agree priorities – i.e. to ensure that there is a coordinating / directing role within the Council, in terms of the distribution of funding and other staff resources, where projects within several district / local centres need to proceed in accordance with a similar timescale. Undoubtedly, the consequence of our suggested Action Plans is that individual centres will effectively be 'competing' with one another – and we foresee that staff and financial resources could therefore be somewhat stretched (and in conflict) unless such prioritisation is agreed, having regard to criteria which are properly established at the outset.

4.44 There are two further major initiatives which we consider should be advanced, as a result of this study. These relate to:-

1. The formation of a District Centre Regeneration company; and
2. The establishment of grass roots development partnerships at the local level, or building on/coordinating with these groups where they already exist.

4.45 Dealing with each of these in turn, we suggest firstly that a District Centre Regeneration company could be set up so as to have in place a 'focused' development partnership enabling the City Council and key landowners (with holdings in a number of the district and local centres) to operate efficiently and with economies of scale, when pursuing the most appropriate regeneration model for individual centres. Importantly, this should enable the City Council and other partners to agree that cross-funding of initiatives can take place between schemes and across different district centres.

4.46 This concept of such a company or partnership could operate in a number of ways, but we believe that it would be effective:-

- In situations where key bodies are investors/property owners/landowners/retailers in several established centres;
- Where the City Council is still a significant landowner and can lead/direct the development partnership (e.g. in Wythenshawe, Newton Heath, Gorton, Longsight and possibly in Hulme);
- Where there are a number of centres near to one another, and all these centres are facing similar issues or problems (possibly those within a single area such as Withington, Fallowfield and Rusholme); and
- Where new City Council-wide partnerships can be formed, possibly building on the work being done by the established local strategic partnerships.

4.47 Secondly, as noted above, the establishment of grass roots development partnerships will, in practice, also build on the work being done by local strategic partnerships within the individual district centres. At a local level, this would have the benefit of engaging local stakeholders, who have intimate knowledge of how the district centres operate, and they would contribute as partners within a forum, so as to inform the development activity of the regeneration company described above. Importantly, where local partnerships and groups already exist, the new management framework would seek to work with them as part of a coherent city-wide network.

4.48 Other organisations with access to funding, such as the Groundwork Trust, could also be involved with district centre projects. The idea would be for the development/regeneration company to come forward with the basic model for regeneration, for the City Council to confirm how (and in what circumstances) it would use its CPO and other powers to bring preferred initiatives to fruition, for the parties to agree the most effective funding and cross-funding measures and for the package of proposals to be refined in consultation with those who have the most detailed local knowledge of the centre.

4.49 As indicated above, we consider that there would be an important linking role for the District Centres Manager, which would apply to all of this work, so as to ensure that there is full coordination between the development/regeneration company, the local development partnerships and other relevant agencies/service providers. Further analysis is needed to identify the best locations to ‘break new ground’ with this initiative, but our initial views are that the New East Manchester area would be a suitable pilot for testing this model/approach, before ‘rolling it out’ on a city-wide basis.

4.50 Moreover, whilst the new approach to management issues outlined above comprises three distinctive strands – a District Centres Manager supported by a senior project champion, a district centre regeneration company, and local development partnerships – it may be appropriate to combine these roles into a single vehicle operating along the same lines as the City Centre Management Company. In many respects, parallels can be drawn between the issues faced by the district centres today, and those faced by the city centre in the mid-1990s. Several aspects of the objectives and approach taken by the City Centre Management Company are of direct relevance to the district centres, including for example:

- Increasing footfall as a priority – the coordination of promotions and events staged by commercial and charitable organisations within the city centre is a significant undertaking for the City Centre Management Company. These activities generate interest, activity, and variety and play an important role in attracting people to the centre. There is significant pressure in terms of the ability of the city centre to meet demand, and there are opportunities to deflect some of this interest to the district centres, and to capitalise on the existing relationships with promotions companies.
- Creating a safe and clean environment – this is crucial in attracting people to any shopping centre, and increasing dwell time and spending. CCTV and wardens have represented positive additions to the city centre, and a coordinated approach across all centres should also be considered.
- Working with groups – the City Centre Management Company works with interest bodies (e.g. the large stores group, and the King Street and St Anne’s Square group) to deal with particular areas of the city and specific issues. The local development partnerships suggested above would operate in a similar way, and other interest

groups – including for example traders with an interest in several centres – could be created.

- Monitoring success – the City Centre Management Company monitor the performance of the city centre in terms of, for example, footfall and hotel bed take up, and a similar approach could be adopted at the district centre level. The types of indicators appropriate to such an exercise are discussed below (Section 6).
- Securing funding – in addition to core funding, the City Centre Management Company actively seek to secure finance from alternative sources through for example advertising, interest group membership, and sponsorship. This would be harder to achieve at the district centre level, but again the District Centre Manager's role would include a requirement to lever funding from, for example, retailers, developers and employers.
- Coordination – the City Centre Management Company works within a framework of its business plan, and in consultation with key stakeholders, to facilitate effective communication and action. As discussed, a single integrated response is also particularly relevant at the local and district centre level.
- Marketing – advertising the city centre is a significant undertaking, and vital in seeking to ensure it remains competitive with other destinations. The same should apply to the district centres – joint advertising and branding would be an important element of their revival, and is something that should be coordinated city wide to maximise benefits and efficiency.

4.51 In overall terms, the City Centre Management Company operates to ensure that the highest possible service standards are attained within the city centre, and that the functionality and management of the city centre is constantly improved. They also seek to provide a strong client focus on behalf of all city centre users, to ensure measures are developed to improve the operation of the city centre. It aims to strengthen Manchester's position as a leading centre by securing higher standards in the trading environment of the city centre, in terms of safety, accessibility, cleanliness, quality of presentation and facilities. The same approach and aspirations should also apply to district (and local) centres.

4.52 The City Centre Management Company evolved from what was originally a single city centre ranger's post and, as discussed above, we would suggest in the first instance a trial or pilot project, possibly in the New East Manchester area, to test these management ideas before establishing the city wide structure envisaged. An alternative approach would be to tap directly into the expertise already within the City Centre Management Company, and expand the remit of that body to include the district and local centres. Whichever model is applied, it will be important to ensure that local stakeholders are empowered through meaningful participation in the management process – the local development partnerships will be of fundamental importance in this regard.

4.53 These broader based initiatives, described above, may take time to put in place. In the interim, the City Council needs to continue to work on the management initiatives which can – and should – be applied at a district and local centre level. Again, the range of such initiatives is diverse, but could include the following:-

- Street maintenance and cleaning;
- Scope for improved coordination with public transport providers – e.g. so as to refocus bus nodes/stops within individual centres – and wider promotion of public transport usage;
- Potential action on CCTV improvements;
- Coordinated action to enhance/control on-street trading and most appropriate 'café society' areas;
- Coordinated action on shop fronts, window dressing and shop front presentation;
- Safety and security measures;
- Review of scope to capitalise further on specialist trades/themes in particular centres – marketing initiatives city-wide (which might apply equally to Asian retailing or antiques);
- Promotion of markets within city-wide market strategy;
- Improved parking and signage;
- Agreed strategy relating to change of use to A3;
- Established principles for detailed monitoring and future benchmarking of district centre performance;
- Initiatives relating to upper floor uses above retail units;
- Test scope before forming/strengthening a retailer's/stakeholder's association;

- Test the need for new skills among shopkeepers/assistants (linked to training providers/education sector) etc; and
- Review problems with commuter parking/other parking problems etc.

Hot Food Take-Aways and A3 Uses

4.54 Whilst hot food take-aways and other A3 uses meet a public need and create employment, they can give rise to concerns and a number of problems for residential neighbours and other occupiers – sometimes over a comparatively wide area. The key issues potentially associated with these uses include:

- **Location** – for example, relative to residential areas as these uses do not always make good neighbours or, in centres, relative to the prime pitch, as a proliferation of non-retail uses can threaten vitality.
- **Cooking and other smells** – it is sometimes difficult to eliminate odours completely, even with the benefit of modern extraction equipment.
- **Ventilation** – the position of flues can create problems for residential and visual amenity.
- **Noise** – generated by a range of sources, from customers (arriving, within the premises, and leaving) to music, vehicles and equipment. This may be exacerbated if the premises stay open late at night, and further issues may arise through the reform of licensing legislation.
- **Parking** – can be a particular problem for take-aways without dedicated spaces with customers, typically visiting for just a few minutes, tempted to park in restricted areas or nearby residential areas.
- **Footways** – there is often a tendency for customers and others to congregate outside A3 premises, which may feel threatening to other people, and this has implications for pedestrian and road safety.

- **Litter** – dropped packaging and food can create a nuisance some distance away from the premises if customers dispose of it carelessly after finishing their meal.

4.55 For these reasons, the treatment of A3 premises has been an important element to the Government's ongoing review of the planning process. This review is summarised below, before the key policy implications arising from it are discussed.

CONSULTATION ON REVISING THE USE CLASSES ORDER

4.56 The Planning Green Paper, published in December 2001, set out the Government's proposals for reforming the planning system. The Green Paper also announced the Government's intention to review the Use Classes Order (UCO). The main thrust of this review is to ensure that a revised UCO is constructed in a way which allows the maximum possible deregulation, consistent with delivering planning policy objectives. This process culminated in the 2002 DTLR publication *'Use Classes Order: Consultation on Possible Changes to the Use Classes Order and Temporary Uses Provisions'.*

4.57 The Town and Country Planning (Use Classes) Order 1987 (as amended) sets out classes of uses. The UCO provides that a move between activities within the same class is not development and therefore does not require planning permission. The Town and Country Planning (General Permitted Development) Order 1995 (as amended) (GPDO) provides further flexibility by classifying certain moves between the Use Classes as permitted development, and these also do not require the express grant of planning permission.

4.58 In revising the UCO, the Government is advocating a degree of local flexibility for planning authorities. This would be achieved by relaxing the boundaries of the GPDO provisions to facilitate changes of use between classes in order to deal with particular local circumstances. However, such a move would require primary legislation, so may not be achievable in the short term.

4.59 Currently, the A3 Use Class comprises ‘sales of food and drink for consumption on premises’ (for example, restaurants, pubs, cafés and wine bars), as well as ‘shops for sale of hot food to be taken away’. A change to A1 (shops) and A2 (financial and professional services) uses is permitted.

4.60 In the review of the UCO it was noted that activities within the ‘A’ Use Classes attracted the most comment and concern, and the greatest concern related to the A3 ‘Food and Drink’ Use Class. This frequently related to noise, particularly from bars. In addition, a second major concern related to crime and anti-social behaviour, sometimes associated with A3 uses. A third concern was the hours of operation for A3 uses, although this can be the subject of licensing control. Issues were also raised in respect of the proliferation of larger pubs and bars, with many new style bar operations often able to accommodate more than 500 patrons. Commonly, these ‘super-pubs’ are located in very close proximity to one another.

4.61 Another further issue raised was converting public houses into fast food restaurants. Currently, a change of use between these A3 activities without express planning permission is allowed.

4.62 The present UCO also does not provide clarity as to what point a change of use is considered to occur between A1 and A3 uses. For example, the Use Class definition is blurred when considering sandwich shops, coffee shops, juice bars and soup bars – which, theoretically, can be deemed as either A1 or A3 uses. Some authorities have raised concerns over the loss of former retail shops to coffee shops and the limitation of the planning powers they have to control this given that, arguably, planning permission is not always necessary.

Options for Change

4.63 The consultation paper sets out 5 possible options for revising the UCO that would affect the 'A' Use Classes and, in particular, A3 uses.

Option 1

4.64 Under Option 1 (with specific reference to A3 uses) the following would be adopted:

- **Aa Uses ('Mixed Retail')** – comprises the sale of food and drink for consumption on premises, including sandwich shops and coffee shops, subject to a maximum Gross Lettable Area (GLA) of 100 sq m. Change to other Aa uses, plus single flat would be permitted. Other uses contained in the Aa classification are broadly consistent with the current UCO A1 and A2 uses.
- **Ab Uses (Restaurants and Cafés)** – comprises the sale of food and drink for consumption on the premises including sandwich shops and coffee shops, where the GLA or the enclosed floorspace is greater than 100 sq m. Change to Aa uses permitted.
- **Ac Uses (Public Houses, Bars and Nightclubs)** – comprises the sale of drink and food for consumption on premises where the primary purpose is the sale and consumption of alcoholic drink, where the GLA or enclosed floorspace is greater than 100 sq m. Change to Aa and Ab uses permitted.
- **Sui generis** – Shops for the sale of hot food (including drive-through restaurants). Change to Aa and Ab uses permitted.

Option 2

4.65 Under Option 2 the 'A' Use Class would be revised as follows:

- **Aa Uses ('Mixed Retail')** – broadly comprising A1 and A2 uses, as defined in the existing UCO.

- **Ab Uses (Restaurants and Cafés)** – comprises the sale of food and drink primarily for consumption on the premises, but including sandwich shops and coffee shops. Change to Aa uses permitted.

- **Ac Uses (Public Houses and Bars)** – comprises the sale of drink and food for consumption on premises where the primary purpose is the sale and consumption of alcoholic drink. Change to Aa and Ab uses permitted.

- **Sui generis** – shops for the sale of hot food (including drive-through restaurants). Change to Aa and Ab uses permitted.

Option 3

4.66 Primarily based on Option 2 above, Option 3 would include premises for the sale of food and drink primarily for consumption on the premises within the new Aa 'Mixed Retail' use, while excluding from this new class premises where the primary purpose is the consumption of alcoholic drinks. This would increase flexibility still further, but would ensure that local planning authorities could retain control over bars and pubs that might have a significant impact on amenity.

Option 4

4.67 Option 4 would retain the existing UCO classification of 'A' Uses (but excluding takeaways), and would allow establishments to change uses between restaurants, cafés, pubs and bars without the need for planning permission.

Option 5

4.68 Option 5 would adopt Options 2, 3 or 4, but with the sale of hot food to be included in the Aa 'Mixed Retail' class. This would avoid difficulties of definition (for example where a fast food restaurant includes eat-in and takeaway facilities in equal amounts), but would not allow control over potential adverse effects of the takeaway trade.

POLICY IMPLICATIONS

4.69 With the Government presently considering a number of options to revise the UCO classification, at this stage it is difficult to determine with any degree of certainty the policy implications that may arise. However, there are two broad points that can be drawn from the options:

- In the longer term, revision of the UCO may allow local authorities to be more prescriptive in terms of A3 policies for specific areas, or certain A3 activities. However, it remains unclear as to the extent of policy flexibility authorities would be granted to achieve this.

- Segmentation of the current A3 Use Class may allow a greater degree of planning control (especially where the definition between A1 and A3 uses is blurred), and could help to limit the proliferation of uses deemed detrimental to amenity. For example, currently a café could be turned over to a fast food outlet without express planning consent. This would not be permitted under the majority of the options considered, and would clearly be of benefit in controlling A3 uses in locations requiring special treatment such as residential areas, whereby planning permissions and changes amongst A3 type uses could be more carefully managed.

4.70 Clearly, this uncertainty is unhelpful in the short to medium term, as local planning authorities continue to face the issues raised by A3 uses on a daily basis. Equally, any local policies put in place now run the risk of becoming quickly out of date as new legislation comes into force, and may appear to be too little, too late, with the perceived problems associated with A3 uses now well established in many locations. However, developing a policy response now would help to limit exacerbation of these problems, and would underpin better management practice in the future. No matter how the treatment of uses is resolved, the effective resolution of planning issues relating to A3 premises will remain an important concern.

4.71 Accordingly, we recommend that the Council should consider the preparation and adoption of Supplementary Planning Guidance (SPG, or a Supplementary Planning Document – SPD – as it will be known under the new planning system) on take-aways and other A3 uses, or concentrating solely on the former if that is considered more appropriate, as a method of addressing these issues. Any such document should detail the appropriate UDP policies (e.g. City Wide Development Control Policies 10, 13, and 26), highlight the wider issues (as discussed above) to be considered in determining relevant applications, and set out the decision making process that will be applied.

4.72 A key objective of the SPG would be to illuminate, illustrate and expand upon the exact meaning of the criteria listed in the UDP policies, including, for example:

- Location – making clear the different issues (e.g. “neighbourliness” and implications for vitality) that need to be considered in, for example, the City Centre, compared with district centres, local centres, parades, residential areas and industrial or other commercial areas.

- Amenity – commenting on issues of noise, opening hours, odours, ventilation and visual impact.

- Car parking and servicing – drawing attention to the different issues associated with take-aways compared with restaurants, and how these vary depending on the location of the outlet relative to the road network, availability of shared parking, and neighbouring uses.

- Access – dealing with social inclusion, but also footway safety.

- Refuse and litter – commenting on the need to deal with this both on-site and in the surrounding area, including the conditions that may be imposed.

4.73 The benefits of adopting carefully prepared SPG to guide the planning of A3 premises include:

- **Consistency** – the same standards, tests and (where relevant) planning conditions are applied across the city area.

- **Quality** – the document should be prepared along best practice lines, to ensure the highest standard of decision-making is achieved.

- **Transparency** – the understanding of the key issues amongst the public and business community is enhanced by drawing together in a single place a clear "rule book" to highlight, formalise and detail an important area, given that existing planning guidance is somewhat ill defined.

- **Accountability** – whilst it is important to be fair in dealing with these matters of concern to the community, it is equally important to be <u>seen</u> to be fair; the SPG provides the framework within which interested parties can assess the extent to which this is achieved.

4.74 Equally, SPG can play an important role in highlighting to interested parties the issues that <u>cannot</u> be taken into account as part of the planning process. One of the difficulties often faced by those making representations with regard to planning applications is that a matter they might feel to be of particular importance does not, in planning terms, constitute a "material consideration". An example of this is the perception that a particular area already has a number of take-aways, and that another is not "needed", or that there would not be demand for it. Further examples include the moral objections that some might hold to pubs, and some of the issues dealt with separately under licensing. By spelling out the most common examples, SPG can avoid frustration, and help people to frame their representations appropriately and effectively.

4.75 This can be compared with the approach taken by other Local Planning Authorities in cities around the country. We have examined the relevant development plan policies, and spoken to officers with a particular interest in A3 and leisure uses, in four cities, and summarise the outcome of this review below.

4.76 In Birmingham, the broad thrust of policy is that A3 uses will be encouraged as complimentary to the retail function of these centres, subject to the need to avoid over-concentration, although the mechanism by which this would be assessed is unclear. Defined primary frontages are protected from change of use from A1 to A3, and a criteria based approach to the consideration of new A3 uses is adopted.

4.77 The proliferation of A3 uses is not considered to be a general problem throughout the city as a whole, and the only area of particular concern is Broad Street in the city centre. Draft SPG has been prepared to deal with this issue, although this is primarily used for negotiation, and concerns are generally addressed through conditions (e.g. dealing with minimum opening hours, internal layout and design, and creating active frontages).

4.78 From a comparatively relaxed approach in the Adopted Nottingham Local Plan (1997), where the use of rigid criteria was not considered appropriate, Nottingham City Council have, through the local plan review process, introduced a more structured approach. Through the first and revised deposit draft plans, a series of criteria are now in place to guide the determination of A3 proposals, dealing with location (the sequential test), character, traffic and road safety, ventilation, storage, insulation, the control of anti-social behaviour, security (CCTV) and, through conditions, seeking to control noise, disturbance, smells and litter. Opening hours are also to be controlled by conditions, although normally only in district and local centres, rather than the city centre.

4.79 Like Birmingham, the area of concern for Nottingham is the city centre, and problems in dealing with A3 premises are largely specific to this area. In particular, there are concerns with the rise of high occupancy licensed premises, and a policy with a presumption against facilities catering for 1,000 or more people was introduced at revised deposit draft stage. This was a response to concerns over anti-social behaviour raised through Nottingham's licensing forum of police, magistrates and city centre managers. This is proving helpful in negotiations with applicants, although a downturn in the number of applications for A3 uses has been noted due to market trends.

4.80 Newcastle City Council does not consider that A3 uses represent a particular concern across the city. The adopted UDP contains a detailed policy statement setting out the criteria to be considered in determining A3 applications, and the types of condition that can be imposed, and officers have found this enables them to exercise adequate control on a citywide basis. Newcastle also limits the proportion of A3 units in different categories of primary shopping frontage according to specific percentages.

4.81 The position in Leeds is more confused, but again there is a mixture of detailed criteria based policy, and limits on the proportion of A3 and A2 units in different types of frontage.

The City Council have commissioned a study into the night time economy driven, in part, by concerns over the proliferation of A3 uses.

4.82 In summary, it appears that the other Local Planning Authorities reviewed tend to be more concerned with these issues in the city centre, rather than across the urban area as a whole. The approaches taken in seeking to control these uses include:

- Criteria based development plan policies – to be effective, numerous criteria may need to be applied, and to be transparent and comprehensible, the supporting text may need to be detailed. At the more strategic, UDP level for major urban authorities we would question whether this is necessarily the best approach.

- Conditions – the effective, creative and consistent application of conditions is an extremely useful tool in seeking to control A3 uses.

- Supplementary Planning Guidance – none of the cities reviewed had adopted SPG to deal with this issue, although it has been drafted in Birmingham to address an individual area of concern. For the reasons set out above, we consider that this may be an extremely helpful tool in seeking to address the specific concerns of Manchester. It is also, if well prepared, a very innovative and pro-active approach. We are aware that it is a path that some authorities have followed (notably LB Ealing), but it is by no means standard practice.

- Working with key stakeholders – it is important to recognise that this is not just a planning issue. By establishing a forum of interested parties, including for example planners, the police, centre managers, magistrates, operators and community groups it should be possible to achieve a more acceptable position. Nottingham have gone some way to this end, and we also understand that LB Ealing have again been innovative in this regard.

4.83 The issues raised by take-aways and other A3 uses are often contentious and a matter of great concern for those affected by them. However, in formulating any policy response it is important to follow an objective, balanced and even-handed approach that avoids being overly prescriptive and takes, as far as possible, a long-term view.

4.84 As discussed above, A3 uses do meet an important need, as lifestyle changes and choices create an increasing demand for prepared food, a wider leisure offer, and additional channels for discretionary spending. Equally, such uses are an important source of employment, often offering flexible working hours to provide job opportunities for those with other commitments. Furthermore, A3 uses and the wider evening economy play an important role in the ability of centres to function at the heart of sustainable communities. This issue is dealt with in more detail in section 6.

4.85 Moreover, previous experience would suggest that a degree of caution is best in responding to certain market trends. For example, the increase in A3 floorspace was originally welcomed by many local authorities, looking to fill vacant shopping areas after the recession in the early 1990s. This should be borne in mind in the current climate whereby the concern is with the proliferation of such uses and the effect this might have on amenity and the character of central areas.

4.86 For these reasons we would suggest that any proposed changes to the way in which A3 premises are treated by the planning system at the local level are subject to detailed analysis and very careful consultation. Accordingly, we would recommend that no change should be made until the revision to the Use Classes Order is finalised, and then action programmed in to the evolving Local Development Framework as appropriate.

NEW CONVENIENCE SHOPPING

4.87 There are several potential areas identified for additional or improved convenience retailing around the city. Each area is further commented on below:

1. **City Centre** – It is unlikely that a main food store of any significant size could be easily accommodated in the city centre. However, if a main food store were proposed as part of any future scheme then this should be supported. The growth of further residential driven neighbourhoods will no doubt stimulate demand for further smaller scale provision. Where major residential driven schemes are brought forward provision should be made for ground floor retail uses, as well as other non-retail uses to serve the needs each neighbourhood accordingly.

2. **Inner North** / **Oldham Road** – It is clear from our findings that a quality food retailing facility is absent from this area, and it also lacks a defined local / district centre to serve the population. Additional work undertaken for New East Manchester on Miles Platting, has identified a potential area for a consolidation and improvement to the retail offer for this area, centred on the Oldham Road / Varley Street area. This area would be suitable for a centre designation, subject to the range and mix of occupiers. The exact centre definition and size will need further examination as part of the Miles Platting Neighbourhood Plan process and subsequent testing.

3. **Openshaw** – The quality of main food retailing in the centre is poor and there is a qualitative need to bring forward improvements. The scale and type of facilities should be analysed through a specific assessment for convenience retail floorspace, and this process should be incorporated into a wider examination of food retailing in East Manchester.

4. **Gorton** – As with Openshaw there is a strong qualitative need to increase and enhance the main food retailing offer in the centre. Again, a more detailed retail assessment is required to determine the appropriate scale of any such facility as part of a wider examination of food retailing in East Manchester.

5. **Rusholme** / Claremont Road – Rusholme does not accommodate a main foodstore, capable of serving the immediate population effectively and a significant residential area west of Wilmslow Road lies a considerable distance away from suitable facilities.

The appropriateness of food retail provision to form part of a consolidated Claremont Road retail area should be considered, and possibly included as an option in the Maine Road development brief. The scale and format of such provision should be subject to further testing through the brief and a retail assessment as part of a wider examination of food retailing in South Manchester.

6. **Wythenshawe / Northenden** – There is a strong qualitative need to improve main food retailing in this area. As noted, Northenden is constrained in terms of development potential and it is most likely that any new provision will be centred on Wythenshawe. Any redevelopment opportunities that could accommodate a foodstore should be promoted, again subject to appropriate assessment as part of a wider examination of food retailing in South Manchester.

4.88 In isolated terms, there is no requirement for individual proposals within centres to be subject to a need / capacity assessment, although "appropriateness of scale" remains an important consideration. However, given the concentration of potential opportunities in east and south Manchester, a proactive strategic view should be taken on the scope to support further convenience retail in these parts of the city, married to the qualitative assessment presented in this study, rather than respond to individual schemes. This study has identified six apparent areas of deficiency in Manchester's convenience offer, as detailed above, and drawn particular attention to deficiencies in the east and south. More detailed work should be undertaken to explore this issue further, to gain a clearer understanding of these markets and the wider parts of the city in which they are located.

4.89 This is dealt with further in our recommendations (section 7). Briefly, however, it should comprise three key elements. First, it should assess current levels of available convenience goods spending, trading patterns in terms of the stores and centres to which that spending is directed, and any existing scope there may be to support further provision. Second, it should examine how this is likely to change at a localised level, both in terms of the pipeline development coming forward and, crucially, the detailed level and distribution of house building and anticipated population change. For example, sizeable new residential development is planned in Openshaw, and this must explicitly be taken into account. Third, this quantitative assessment should, as discussed above, be viewed alongside a qualitative assessment taking into account the particular needs of local areas and wider regeneration initiatives. For example, the paucity of provision in Miles Platting should be an important consideration.

4.90 These three elements should then be examined in combination to reach a fully informed view in terms of the preferred strategic location or locations for future foodstore development on a centre by centre basis. This would reflect the existing market, a detailed understanding of the locations of future growth, and the qualitative needs of local people, all set within the context of wider regeneration initiatives.

4.91 In the main, as would be expected, Manchester's local centres all provide some form of convenience retailing. This ranges from supermarkets (e.g. Somerfield at Mauldeth Road), to discounters and deep discounters (e.g. Kwik Save at Victoria Avenue / Rochdale Road and Aldi at Ashton New Road / Manchester Road), convenience store multiples and groups (e.g. Spar at the Precinct Centre on Oxord Road), and small independent general stores. As such, at a minimum these centres provide local people with access to basic day to day convenience shopping.

4.92 The exceptions to this are Dickenson Road / Anson Road which has no grocery provision, and Kingsway / Slade Lane which is served by an off licence only. The weakness of these centres is highlighted above, with the recommendation that consolidation should be considered. They also fall within the Rusholme / Fallowfield / Withington development priority area, which appears underserved in overall terms by food retailing. A revised offer here, alongside a potential new / replacement centre associated with Maine Road, may represent an opportunity for convenience shopping at the local centre scale.

Comparison Retailing

4.93 We have identified through the assessment of each of the district centres, that there is not a full range and choice of retailing in parts of the city area. Notably we believe that it would be prudent to further investigate the role that larger scale retailing could play in extending such a range and choice in East Manchester and South Manchester.

4.94 In the first instance the priority must be to investigate a more detailed quantitative case for such additional development. Secondly the role that existing centres can play in meeting any such need should be assessed. In particular we believe detailed consideration should be given to which centres can provide such retailing for East Manchester.

4.95 In south Manchester there are less immediately clear opportunities to accommodate such development if need is determined. Therefore the complementary nature of any new facilities would need to be carefully considered to ensure that there would be no undue impacts on existing district and local centres.

5. ACTION PLANS

5.1 In our Stage 1 report, we provided a detailed analysis of the performance of each of Manchester's centres, from a retail, service and wider social inclusion standpoint. In Sections 2, 3 and 4 of this report, we set out the framework for how the centres should evolve in the future, by drawing attention to the evolving policy position at the national level with regard to local shopping and service provision, key overarching economic and business trends, and new policy approaches for Manchester itself.

5.2 Against this background, in this Section we present a vision for the future of Manchester's district centres, by providing an action plan for each. The action plans represent a strategy to deliver district centres that will contribute to achieving sustainable communities in light of the wider trends outlined earlier in this report. The district centres are addressed in alphabetical order, as follows:-

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

5.3 Each action plan includes a summary of the key issues facing the centre, based on the detailed analysis prepared in the Stage 1 report and a qualitative review of the main strengths and weaknesses. The analysis carried out at Stage 1, summarised in the Stage 1 report and set out in detail in the appended District Centre Profile proformas, underpins the key issues section of each action plan, and informs our suggested response.

5.4 The proformas represent a detailed summary of the extensive survey and field work carried out in Stage 1. They include a commentary, and analysis of over fifty variables covering four principal areas, including:

- Retail – looking at shopping provision, expenditure and activity, customer views on the retail range, quality and environment, and commercial viability

- Social inclusion – looking at the availability of services, customer views on a range of issues, the evening economy, and accessibility

- Shopper views and profile – investigating what people like and dislike about each centre, how they consider it has changed, and their key characteristics

- Relationship with other centres – identifying the alternative locations visited for shops and services, and the overall status of each centre in retail and social inclusion terms

5.5 Each variable is assessed, as appropriate, in absolute terms (e.g. looking at the number of units, spending levels, or a score assigned by centre users), by calculating a percentage (e.g. proportion of units vacant, proportion visiting services, or proportion of visitors living within 500m), in qualitative terms (e.g. looking at particular views expressed), or in a combination of these ways. Where possible, each variable is compared against the average for all sixteen of the district centres. The average is adopted as a benchmark or standard against which performance is measured.

5.6 Implicit in this is the assumption that the average across all district centres is adequate and represents the standard that should be expected everywhere. Centres that fall well below this average according to any given variable are considered to be underperforming in that regard, centres falling well above the average are considered to be performing strongly. On this basis, we can make informed statements in the action plans concerning a wide range of issues.

5.7 Solutions to the points raised in the key issues section of each action plan are then suggested, including:

- Development solutions – identifying sites for future redevelopment and improvement and identifying possible uses, whilst having regard to pipeline schemes

- Environmental solutions – looking for example at shop fronts, centre maintenance and the wider streetscape and pedestrian environment

- Management solutions – examining how the shift in focus within centres can be managed, and how other aspects, such as integration with public transport, can be improved

5.8 Whilst a detailed review of the centre boundary for each centre was not part of our remit, in each action plan we provide guidance where we feel that boundaries should be redrawn. This is of particular importance when considering, for example, the application of the sequential approach to site selection, and for this reason we recommend that a formal review of each centre boundary should be undertaken.

5.9 Key land assembly issues arising out of the action plan proposals are identified, as are the principal agencies that would be involved in their implementation. Finally, for each centre, an “immediate priority” is set out, highlighting where we believe attention should be focused in the first instance. In particular, those centres identified (section 4) as falling within a “development priority area” are highlighted. These are recognised amongst all Manchester’s district centres by this study as representing a particular priority for action.

5.10 Throughout, the relationship between the Action Plans and the broad policy approaches identified above (section 4) is highlighted by referring to each initiative, as appropriate, by number within square brackets, as follows:

[1] The new centre hierarchy

[2] Development priority areas

[3] Centre boundaries

[4] Development needs and opportunities

[5] Environmental improvements

[6] Management initiatives

[7] Hot food take-aways and A3 uses

[8] New convenience shopping

1. CHEETHAM HILL ACTION PLAN

Key Issues

5.11 Cheetham Hill is one of Manchester's largest district centres, but the quality of its offer in the retail sector is comparatively poor, and it does not meet its full potential as a service centre. Whilst the representation of convenience outlets in the centre is in line with the average, main food shopping provision is limited to a poorly located Kwik Save, and an Iceland, following the closure some years ago of the Co-Op supermarket. This is reflected in comparatively low spending on convenience goods and, in particular, a low proportion of shoppers doing their main food shop. The absence of a quality food superstore is a key weakness of this centre, which currently lacks real destination value. Users identify the poor range of shops as a key weakness of the centre, and highlight the provision of more and better quality shops as an important area for improvement.

5.12 The provision of public service outlets is above average, and Cheetham Hill benefits from some important facilities including a modern Job Centre on Crescent Road, a Neighbourhood Office and a Police Station. However, the proportion of visitors using these services is comparatively low. The provision of private service and leisure facilities is very low, and the evening economy is very poorly developed.

5.13 These factors are reflected in the overall performance of the centre, which points towards borderline commercial viability. Average spending on comparison goods is low, and average spending on convenience goods is very low. Average dwell time is well below average, and vacancy rates are very high – almost a quarter of units are vacant. In fact, the vacancy rate is 50% higher than the average of all of Manchester's district centres. Moreover, the centre suffers from extended vacant frontages in some sections.

5.14 A further key issue is the quality of the built environment. In particular, Cheetham Parade – the early 1970's shopping precinct comprising a high street block and a mall leading to a square with car parking to the rear – suffers from a number of problems. The entrances to the centre are inconspicuous and uninviting, the main entrance set behind the projecting canopy of the adjoining units, with poor visibility from Bury Old Road. The entrance to the rear from the car park is dark and uninviting. There is a comparatively low level of illumination within the centre, which also suffers from an absence of soft landscaping, limited signage, a widespread degradation of the building fabric and a large number of vacant units. The car parking is perceived to represent a security risk; indeed, safety and security is an important concern amongst users of the Parade.

5.15 The retail environment within the other main element of Cheetham Hill flanking Bury Old Road is also comparatively poor. There are exceptions to this, particularly in the northern half of the centre where most of the national multiple outlets are concentrated, and some corridor improvements have been implemented (e.g. to paving, lighting and bus stops). However, further to the south, where Bury Old Road runs into Cheetham Hill Road, the appearance of the centre deteriorates markedly. This area is much more secondary in terms of its function, and the upkeep to shop fronts and basic maintenance is less than adequate.

5.16 The centre lacks definition and a clear focal point. The "natural" focal point is Cheetham Parade, but the environmental problems described above and the absence of major retailers detracts from its ability to perform an anchor function. Equally, signposting within the centre is poor, and, particularly to the south, there is no clear definition of where the centre begins. Uses behind the high street such as the clinic, Kwik Save, Job Centre and main car park are poorly integrated into the centre as a whole. It is a linear centre, and lateral movement and scope for growth is restricted. In overall terms Cheetham Hill lacks cohesion.

5.17 The ability of Cheetham Hill to operate as a district centre is undermined by the quality of its retail offer, the quality of its private service offer and the quality of its urban environment. In the absence of intervention its future vitality and viability will be compromised.

Identifiable Solutions

i) Development

5.18 We are aware of the proposals to redevelop the Cheetham Hill Parade, land at the junction of Thomas Street and Arlington Street (owned by Manchester City Council), and the Wesleyan Cemetery immediately to the south of this. The development proposals include the provision of a food superstore to be operated by Tesco.

5.19 Whilst at the time of writing plans have not been finalised, we understand that the Tesco store is likely to be located on the car park area to the rear of the parade, acting as a magnet to draw people through a redeveloped mall from Bury Old Road. The Bury Old Road frontage and entrance will be markedly improved, whilst bus routes will be diverted through the scheme and taxi set downs provided to improve accessibility. A new car park will be built on the cemetery and adjoining land.

5.20 This development would address one of the key weaknesses identified above, by providing a main food anchor for Cheetham Hill. Moreover, the redevelopment of the parade would allow for the provision of more and better quality general shopping – another area for improvement – whilst the scheme as a whole would provide clear definition and a strong focal point. Spin off benefits to the rest of the centre through linked trip spending to improve its overall performance and viability would be expected.

5.21 In our view, a comprehensive treatment of the nature described above is necessary to address the deep seated problems within this crucial part of Cheetham Hill. An alternative, less radical approach, would be to retain the parade in its present form whilst seeking to introduce a programme of improvements to refurbish the centre. These would address the physical appearance of the centre and problems of security. They would include for example "branding" the centre to provide a strong corporate identity, the provision of directory signs and street furniture, installing entrance gates, upgrading entrance routes, improved lighting, the introduction of more seating, a play area and barrow stalls, and reconfiguration of units to create a stronger retail frontage onto the square.

5.22 This programme of improvements was suggested by Jones Laing Wootton as long ago as January 1996 in a report prepared on behalf of the centre owners, investigating the potential for the revitalisation of the centre. At this time, they concluded that this refurbishment option would achieve little in terms of attracting new multiple retailers or shoppers into Cheetham Hill, and Cheetham Parade specifically, and as such would only represent a short term solution to the underlying problems. In our view, this conclusion remains valid today. Decisive intervention with a strong main food anchor is key if the more affluent population from the untapped client base in the wider catchment area is to be attracted to the centre.

5.23 Development opportunities elsewhere in the centre, and particularly to the east and west are constrained by the comparatively dense residential fabric. There may be scope to implement a more coherent treatment of the land between Crescent Road and Humphrey Street north of Cheetham Hill Road as far as the Job Centre, although the complex and fragmented nature of the uses and ownerships in this area would make this difficult, and the forthcoming scheme centred on Cheetham Parade makes this a much lower priority. Similar comments apply to the block directly opposite on the other side of Cheetham Hill Road, either side of Robin Hood Lane.

ii) Environmental [5]

5.24 A key aspect of environmental solutions proposed to combat the problems faced by Cheetham Hill should be a programme of shop front improvements. As discussed above, there are sections of Bury Old Road where this is less of an issue, but these frontages are comparatively restricted and a more comprehensive treatment is required to improve what is currently, in part, an unappealing shopping environment, particularly to the south on Cheetham Hill Road. Cheetham Hill suffers from a poor standard of street cleanliness and maintenance and this is reflected in the widely held negative perception and reputation of the area, and the perception amongst shoppers that the centre has become less attractive in recent years.

5.25 As discussed above, a start has been made with the implementation of a programme of much needed improvements to the Bury Old Road corridor. Further improvements should be made in this regard, with particular emphasis on seeking to create a strong identity for

Cheetham Hill, and developing strong links with other sections of the corridor, particularly to the south.

iii) Management

5.26 It will be important to monitor and measure the effect of the Tesco anchored scheme on the future performance of the centre. We would therefore recommend that Cheetham Hill be revisited and fresh research undertaken once the development is complete and the centre has been open and trading for some time to establish settled trading patterns. The performance of the revitalised centre could then be benchmarked with that of the current centre as highlighted by this research, to provide an indication of the extent to which the partially redeveloped district centre better meets the needs of local people. Equally, the effects of this redevelopment on Lansdowne Road / Crumpsall Lane local centre should be monitored. This appears to be a strong centre serving a well defined local catchment in Crumpsall, and for this reason we do not anticipate any particular difficulties arising, but it is important to keep this situation under review [1, 6].

5.27 Given that Cheetham Hill straddles the boundary between Manchester and Salford it is also important to ensure cooperation between the two authorities as the centre evolves and improvements come forward [6]. Joint funding by the two authorities in order to commission further monitoring and research may, for example, be appropriate.

iv) Centre Boundary

5.28 The district centre boundary should be redrawn [3]. There may be merit in truncating the centre as defined to the south beyond Woodlands Road where uses and development become more fragmented and secondary in nature. Equally, the boundary of the centre currently runs along the eastern side of Bury Old Road north of Crescent Road i.e. following the administrative boundary. Clearly, in practical terms, the centre includes units on the Salford side of Bury Old Road and the boundary should be adjusted here accordingly. Once the Tesco development is in place, it will be necessary to assess the extent to which it integrates with the centre as a whole, and if appropriate again redraw the boundary to include this new scheme.

5.29 Alternatively, the extension of the Cheetham Hill boundary to the south, perhaps as far as Shirley Road, should be considered. Whilst, as discussed, the centre becomes fragmented for a stretch south of Woodlands Road, there is then a section of more focused retail and service uses largely operated by business people from the Asian community. However, this would result in a comparatively elongated centre boundary. In this context, any redefinition of Cheetham Hill as a district centre should be carefully assessed.

v) Land Assembly

5.30 In the context of the ongoing development described about, it is not anticipated that further land assembly would be immediately required.

vi) Key Agencies

5.31 In addition to Manchester City Council, the key players involved in the future of Cheetham Hill will be Tesco and Mars Pension Trustees Limited (the owners of Cheetham Parade) as they bring forward the regeneration of this part of the centre. As discussed above, the cooperation of Salford City Council should be sought [6].

vii) Immediate Priority

5.32 With the redevelopment of Cheetham Parade now underway, the immediate priority is to invest in a programme of environmental improvements elsewhere in Cheetham Hill, to ensure that the centre as a whole is able to contribute to meeting the needs of local people once the new development is in place.

2. Chorlton Action Plan

Key Issues

5.33 Based on the overall analysis of the results of all the survey work, it can be concluded that Chorlton is a large scale district centre which is performing well in many aspects. This is reflected in its designation as a “major district centre” within the hierarchy suggested above (section 4) [1]. However, there are certain key matters that do need to be addressed to ensure that Chorlton continues to sustain itself as a strong district centre for the area, and thus to ensure that it can improve accordingly. From the work undertaken it is evident that a critical factor is the poor quality and function of the main foodstore (Safeway). This is not providing a focal point for the centre, partly due to its configuration and orientation to the centre and partly perhaps due to the brand, which has lost its significant market share in recent times.

5.34 With competitive opportunities available elsewhere for those in the Chorlton catchment (east towards East Didsbury, south to Sale and across to the Trafford Centre) this matter does need addressing in order to provide a strong platform for the centre in the future.

5.35 The centre itself is somewhat disjointed in nature as it spreads southwards along Barlow Moor Road. The centre is effectively split into two areas, the north area being the main centre and the south area near Chorlton Park being very disjointed in terms of provision of facilities. In particular, a main bus facility, located at the southern end along Barlow Moor Road, bears no relation to the main core of the centre.

5.36 There are also pedestrian/vehicle conflicts at the junction of Barlow Moor Road and Wilbraham Road in the centre, which need to be addressed.

Identifiable Solutions

i) Development

5.37 It will be essential to reconsider the format of the main food store at Chorlton, and in particular, to explore new ideas following the result of the take over of Safeway (be this by Morrisons or any other operator or business). A change of brand may stimulate a greater use of the store and hence the opportunity to attract further people into Chorlton centre. However, the area of land to the north of the store along Albany Road could be considered further to allow for expansion or reconfiguration of the unit. It is also an important area, given the proposed tram stop in the vicinity.

5.38 We have also noted the close proximity of two primary schools and a library, to the immediate north of the shopping centre and west of Barlow Moor Road. There may be an opportunity to consider rationalisation of these facilities and this would need to be explored further with education providers. This could provide opportunities for additional development, either to provide more service facilities in a concentrated location or additional retail opportunities.

ii) Environmental [5]

5.39 The pedestrian routes around the centre are not of a high quality and the crossing between Wilbraham Road and Barlow Moor Road does not allow pedestrian phasing. This can inhibit the east - west flow of pedestrians, which if improved would strengthen the links between the shopping centre and the main foodstore across Chorlton. This needs further consideration, especially given the future tram stop location.

5.40 The pavement width west of Barlow Moor Road on Wilbraham Road does allow for some considerable improvement to landscaping and amenities such as seating etc and this could be exploited further.

5.41 The identity of the centre could be markedly improved by such environmental improvements, which could coincide with the redefinition of the centre boundary, as discussed below.

iii) Management

5.42 The key aspects that need to be managed more effectively in the future relates to public transport, especially along the Barlow Moor Road corridor [6]. There is an opportunity to create a bus node point better related to the centre core. This could link to the tram facility and any reorientation / reconfiguration of the main food superstore. However, this would be distinct from the main focal point of the centre itself, which is at the junction of Barlow Moor Road and Wilbraham Road. This will need further investigation with bus operators and the GMPTE accordingly.

iv) Centre Boundary

5.43 The centre boundary requires major reconsideration in order to provide a greater focus to the main Chorlton centre [3]. Certainly the southern part of the boundary extends too far and is effectively split from Chorlton centre by an area of predominantly residential uses. The current boundary appears to be rather randomly drawn in this area. It would also need to be reviewed around the main foodstore area, and Albany Road, as well as potentially being redefined and contracted on the north side of the centre. In addition, consideration should be given to including within the boundary the school buildings to the north west of the centre.

v) Land Assembly

5.44 The potential requirement for land assembly is driven by how – and where – future opportunities evolve. For example, a simple reconfiguration of the main food store may be contained within the existing store boundaries. Similarly, any rationalisation or consolidation of public facilities around the schools and library would all be within Manchester City Council ownership. However, if further development were to take place along the Albany Road corridor, linking to the new tram provision, then this may require some land assembly adjacent to the Albany Road trading centre.

vi) Key Agencies

5.45 The key agencies involved in bringing forward these initiatives would be a combination of the foodstore operator and the transport providers as well as public intervention on environmental improvements, through Manchester City Council Highways.

5.46 With regard to service provision this could be considered further, primarily within the realms of Manchester City Council, unless opportunities were readily available to link with other non-retail service providers.

vii) Immediate Priority

5.47 The catalyst for improving and changing the centre will undoubtedly be the improved performance of the main foodstore and this should be the immediate priority to drive Chorlton forward. The opportunity to provide a focal point for public transport in this location should also be considered. However, at the same time, further investigation should be undertaken to provide a more efficient public service provision in the schools/library sector. Accordingly, this may require further study work to be undertaken by the Council.

3. DIDSBURY ACTION PLAN

Key Issues

5.48 Overall, there is very little that is of immediate concern with regard to Didsbury. It functions well as a district centre, has a very low vacancy rate and has a strong mix of food and non-food facilities and good public transport access. This is reflected in its designation as a “major district centre” within the hierarchy suggested above (section 4) [1].

5.49 However, public service facilities are not readily concentrated in the centre. There is no large main food retailing presence, although a discount retailer (Aldi) is located at the northern end of the centre. The centre is, however, close to East Didsbury and the Tesco food superstore at this location provides a main convenience shopping function. There are a lower number of comparison outlets in proportion to the centre overall and this may well be partly as a result of the expanding A3 sector, from which new uses have come forward in the centre in recent years.

5.50 There are clear parking problems associated with Didsbury district centre. However, this mainly due to its compact nature and the limited parking opportunities available off the main thoroughfare.

5.51 In light of the above, the main issues therefore tend to be focused on environmental / management matters.

Identifiable Solutions

i) Development

5.52 There are very few opportunities for new development in Didsbury, save for redevelopment of existing facilities (such as the recent redevelopment of units for a Marks and Spencer 'Simply Food' store and housing). One opportunity that may potentially arise would be the redevelopment of the petrol station at the southern end of Wilmslow Road, if a continued rationalisation of petrol filling station facilities resulted in its closure.

ii) Environmental [5]

5.53 Certain parts of Didsbury have a less friendly pedestrian environment, particularly along School Lane and at its crossing point with Wilmslow Road.

5.54 There will also need to be a safe and clear pedestrian linkage between the proposed tram stop to the east side of Wilmslow Road to the rear of the shop units and the retail centre more generally.

iii) Management

5.55 Car parking provision is under pressure in Didsbury. However, the arrival of the tram may decrease these parking pressures, due to the availability of alternative public transport modes allowing access to the centre. The limited size of the existing car parking area may not merit detailed signage arrangements and we do not readily see how congestion can be relieved for Didsbury by any direct management steps. It may therefore be the case that measures such as the promotion of green travel initiatives for people working in Didsbury could be important. These initiatives could be undertaken within the centre itself to assist in promoting alternative means of travel and especially by public transport.

5.56 With regard to A3 uses their presence and impact will need to be monitored accordingly to ensure the right balance is struck between retail and non-retail uses in the future. Mechanisms by which this may be achieved are set out above (section 4) [7].

5.57 Given the limited number of national outlets trading from Didsbury, there may be an opportunity to consider a localised business improvement district to bring forward further environmental improvements, with contributions sourced from the local business community. Given the minor nature of any intervention required, this could be a useful test basis for such a management process for a district centre and depending on a successful outcome, the initiative might usefully be adopted in other appropriate centres [6].

iv) Centre Boundary

5.58 There are minimal changes needed to Didsbury's centre boundary, although some clarity may be required at the northern end of the centre, to reflect changes in the existing facilities.

v) Land Assembly

5.59 There does not appear to be any urgent need for land assembly processes as there is little opportunity for future development in the centre. However, if in the future there are opportunities to combine smaller units to provide for larger floorplates then this should be considered and enabled, if appropriate.

vi) Key Agencies

5.60 The main agencies involved would be the existing local owners and occupiers and Manchester City Council Highways, if street improvements were brought forward. The opportunity to propose a package of street improvement measures could be connected to the development of the tram stop and the requirement for a clear pedestrian access from the stop to the centre. This is particularly important given the limited capacity of car parking within the centre.

vii) Immediate Priority

5.61 There are no immediate priorities that face Didsbury in order to improve its standing. Any opportunities tend to be non-development orientated and concern continued streetscape and pedestrian improvements. Didsbury may, however, be a suitable location to test a business improvement district style initiative that could be adopted for other district centres, and this should be investigated accordingly.

4. FALLOWFIELD ACTION PLAN

Key Issues

5.62 Although there is a significant number of shop units in Fallowfield, one of the centre's greatest weaknesses is the lack of non food shopping. There tends to be a dominance of A3 uses which is perhaps unsurprising given its location close to a large student population. The centre also suffers from a poor level of public service provision. The centre is strongly dominated by the Sainsbury foodstore, and this unit serves as a key focal point for Fallowfield.

5.63 Heavy traffic flows through the centre result in concerns regarding pedestrian safety, coupled with the poor built/pedestrian environment throughout the centre.

5.64 The small floorplates offered by many of the existing retail units is potentially inhibiting the development of quality non-food retail provision, and these smaller units are better suited to restaurant / take-away uses which have become prevalent in the centre.

Identifiable Solutions

i) Development

5.65 A tyre / car service centre, immediately adjacent to the main entrance of Sainsbury, could provide sufficient floorspace for a quality non-food retail unit. It could also be considered as a potential expansion site for Sainsbury to widen its in-store product range.

5.66 In addition, there is a large builders yard at 11 Ladybarn Road, which overlooks (at a significant height differential) the main car park to the rear of Sainsburys. This site could provide for some quality non-food retail facilities, given its proximity to the main foodstore anchor, and the potential for operators to feed off existing custom at the store.

5.67 These sites combined can provide a strong nucleus for the centre to continue to thrive around the Sainsburys store.

ii) Environmental [5]

5.68 The quality of the pedestrian environment needs to be improved in respect of the overall streetscape appearance. There is also a need to improve pedestrian crossing facilities at the junction of Wilbraham Road and Wilmslow Road. This is particularly the case given the strong pedestrian connectivity to Owens Park to the north east of the centre (this area being the main student campus). The quality of the centre would also benefit from a programme of shop front improvements.

iii) Management

5.69 There is a clear need to reconsider the amount of A3 uses which have been allowed to dominate in the area. Although this is partly the attraction of Fallowfield to the student population (notably public houses), controls on the overall level of take away/pub/restaurant provision needs to be carefully considered in the future. Mechanisms by which this may be achieved are set out above (section 4) [7].

5.70 With the considerable amount of evening economy activity in the centre there is some concern over crime/disorder and personal safety. The introduction of CCTV in the centre should therefore be considered as a priority. This could be linked to further initiatives from the Owens Park campus, especially to promote student safety in the centre (for example, even by way of a surveillance link to Owens Park).

5.71 Future decisions about the management and development of Fallowfield should have regard to its relationship with the nearby Kingsway / Slade Lane and Dickenson Road / Anson Road local centres. These centres are identified above (section 4) as falling some way short in fulfilling their designated role, and potentially benefiting from consolidation. Any strategy for action in Fallowfield should seek to support this [1, 6].

iv) Centre Boundary

5.72 The centre boundary requires clearer definition, with particular consideration given to the north side of the centre, which is elongated on one side, but only north of Wilbraham Road [3].

v) Land Assembly

5.73 If the opportunities identified above were carried forward then appropriate land assembly would be required, although new development proposals would hopefully come forward by way of private promotion/land acquisition. This would depend greatly on operator interest, particularly from Sainsbury (for any extension) or other operators seeking to locate near to this store.

vi) Key Agencies

5.74 There is a clear opportunity to attract developers to the opportunities identified and, in turn, this may provide a catalyst which can begin to fund a number of street improvements for the centre.

5.75 Existing key occupiers such as Sainsbury and McDonalds also need to be approached to understand if they would wish to assist on general centre improvements (possibly by way of sponsorship/mini business improvement district).

5.76 With regard to personal safety issues, there needs to be further liaison between the Police and the university, to identify the most appropriate and effective measures that could be incorporated.

vii) Immediate Priority

5.77 The opportunity to promote a non-food retail scheme could be the catalyst for further improvement to the centre. Consideration also needs to be given to promoting non A3 uses where appropriate. This could be fulfilled by improving public service provision for the centres e.g. through direct occupation of available units by City Council services or through other service providers connected to the area, such as student facilities. Fallowfield, together with Withington, and including Rusholme, is identified (section 4) as falling within a "development priority area" in the central-southern part of the city [2]. It is therefore recognised amongst all Manchester's district centres by this study as representing a particular priority for action, and recommended that action be coordinated carefully with that elsewhere in the area.

5.78 Moreover, Fallowfield is classified (section 4) as a "minor district centre" within the suggested hierarchy of centres [1]. As such, it sits alongside some of Manchester's worst performing centres, and the aim should be to elevate it to "district centre status". This further underlines the view that it should be treated as a priority for action.

5. GORTON ACTION PLAN

Key Issues

5.79 In retail terms, Gorton has one of the weakest offers of any of Manchester's district centres. The performance of its convenience goods sector is particularly poor. Whilst the centre has two supermarkets, one of these (Kwik Save) is poorly related to the rest of the centre, whilst the other (Pioneer Co-op) is substandard, does not appear to be well patronised, and we understand is scheduled to close in the near future. The range of other convenience outlets is limited. The representation of comparison outlets is better, and average spend on comparison goods is comparatively high, but again the quality of provision is extremely poor. The representation of national multiple retailers is low. The overall quality and the range of the retail offer restricts the ability of Gorton to perform a district centre role.

5.80 The function of Gorton as a district centre is further undermined by its limited provision of private service and leisure facilities, although the representation of public services is comparatively high. Furthermore, a number of the private service uses are of poor quality, and situated on the south side of Hyde Road, divorced from the main part of the centre. Over a quarter (26%) of Gorton shoppers would like more and better services in the centre, compared with an average of just 6% across all Manchester's district centres.

5.81 This notwithstanding, a number of commercial viability indicators point towards the potential of the centre to achieve a higher performance and fulfil more adequately its district centre role. For example, visitation rates are above average, overall shopper spending in the centre is 25% above average, and dwell time is in line with the average for all Manchester's district centres. However, the vacancy rate is nearly double the average, and Gorton has the highest vacancy rate of all Manchester's district centres. In this context, Gorton would benefit significantly from comprehensive intervention to rationalise the offer and create a more focused and vibrant district centre capable of performing its role and function more adequately. This is particularly important given that Gorton shoppers consider the centre has become much less attractive as a place to visit in recent years, awarding it the lowest rating of all Manchester's district centres in this regard.

5.82 A further key issue is the lack of definition and a clear focal point within the centre. Gorton, as defined, is a linear centre and its various sub areas are disjointed and poorly related. For example, the centre boundary includes units on the south side of Hyde Road from the railway line in the west to Brookfield Church in the east. This frontage is characterised by fragmented uses including residential, a variety of services, and a number of discount bulky goods operators and has little physical, and in some respects functional, relationship with the rest of the centre.

5.83 It is separated from the main shopping area by a busy main road, a landscaped bank, and an area of hardstanding. Equally, on the north side of Hyde Road, the boundary extends as far east as the Lord Nelson Pub, at the end of a stretch of low intensity uses in a poor state of repair. The cluster of units around the junction of Wellington Street and Cross Lane is again divorced from the main shopping centre, which turns its back on adjoining roads and the surrounding residential area and lacks prominence as a result of its location, hidden some way back from Hyde Road at the junction of Garratt Way and Wellington Street. This, in turn, is divorced from Kwik Save which, along with Blockbuster Video and Kentucky Fried Chicken provides something of a focal point to the western end of the centre. The intervening uses, including the Police Station, Community Centre, Suburban public house and car park do not serve to link the two ends of the centre well.

5.84 The quality of the built environment is, generally, poor, and the overall quality of the shop fronts could be improved. Particular areas of concern in this regard include the north side of Hyde Road east of Wellington Street and areas of Wellington Street itself. Equally, the environmental quality in the shopping centre itself and adjacent market area is poor, with litter, graffiti, and vacant units with shutters down presenting a threatening appearance. A third of Gorton shoppers identify the poor quality of the market as one of their key dislikes of the centre. Concerns about safety and security also feature prominently, with a quarter of Gorton Shoppers highlighting this as an area of concern, raising issues such as the evidence of anti-social behaviour, and problems associated with young people hanging about.

5.85 In retail terms, Gorton is a poor and declining centre. In inclusion terms, Gorton is less than adequate, particularly in terms of the provision of private services and has a poorly developed evening economy. This notwithstanding, the centre is well used, and decisive action to address these issues, through for example the rationalisation and re-orientation of the existing offer, is of some importance in ensuring that the centre is better able to perform its district centre role, and meet the needs of those who rely upon it.

Identifiable Solutions

i) Development

5.86 Careful consideration should be given to the potential for comprehensive redevelopment of the existing shopping centre including all or the greater part of the land bounded by Whitwell Way, Garratt Way, Wellington Street and Hyde Road. It is in our view doubtful whether essentially cosmetic changes to the shopping centre in its current format would bring about the improvements necessary to allow it to meet is potential and perform adequately as a vital and viable district centre.

5.87 For the centre to succeed it is likely that a main food retail anchor will be required to replace the currently sub-standard and under performing Pioneer Co-Op [8]. Such a store, together with unit shop provision could be orientated to present a strong and highly visible frontage along the northern side of Hyde Road, which currently lacks definition. Clearly, such a development would address a number of the issues outlined above, including the quality of the convenience offer and range and quality of comparison shopping, as well as providing the opportunity to incorporate a wide range of private services including an enhanced leisure and evening economy offer, and to provide a clear and distinctive focal point to define more clearly Gorton as a district centre.

5.88 Such a development should also include a careful review of the form, function and value of the current market offer comprising both the market hall and outdoor market areas. Whist the market may have an integral role in the future of Gorton as a successful retail centre it is important to recognise that a comparatively high proportion of those using the centre perceive the poor quality of the market to be one of Gorton's key weaknesses.

5.89 Equally, major redevelopment of the type outlined would offer the opportunity to review the role and function of the existing public services in and adjacent to this area, including the Police Station, community centre, library, and disused public baths. The potential repositioning and integration of these services with each other and as an important element of the centre as a whole would again help to create a better focus and identity for Gorton, and potentially enhance the relationship with Kwik Save and the other uses as the western end of the centre.

5.90 The design of any such development, its layout and the orientation and positioning of units within the site must be carefully planned so as to improve the relationship with uses on the southern side of Hyde Road, and to maximise the benefits to be gained from high visibility and prominence on this major arterial route. Uses on the south side of Hyde Road have the <u>potential</u> to perform a complementary function to the rest of the centre. However, their current isolation from the main shopping provision in the centre is a key weakness in its ability to perform as an integrated whole.

5.91 Whilst the principle of retail development should be supported here, it is important that the scale, function and format of any scheme be carefully analysed, and this analysis is subject to detailed scrutiny. Whilst investment in Gorton is to be encouraged, this should not be at the expense of other defined centres in the area including for example Openshaw, Longsight, and Sport City. Appropriateness of scale is an important consideration.

5.92 This development opportunity, in combination with the management responses and boundary changes suggested below, would create a clear focal point for the centre to the west of the junction between Hyde Road and Wellington Street, and an overall westward shift in the focus of the centre. Further opportunities may then be explored for other development sites, including the disused depot, adjacent land, and land to the rear, on the south side of Hyde Road opposite its junction with Thornbury Way.

5.93 Given the complexity of the redevelopment of this area, the potential re-positioning of a number of public facilities, and the comprehensive revitalisation of the shopping centre, it is our view that a master planning approach should be undertaken. In this context, we recommend (section 4) that specific policy support should be given to encourage development in Gorton [4].

ii) Environmental [5]

5.94 A key aspect of environmental solutions to the problems faced by Gorton should be a programme of shop front improvements. As discussed above, there are areas, including within the main shopping centre itself, where the quality and upkeep of the shop frontages is sub-standard. Clearly, this would be achieved through major intervention as part of the comprehensive redevelopment suggested above, but in any event where existing outlets may remain, major shop front improvements will still be required. Coupled with this, it is important that the pedestrian linkages to the surrounding area, and in particular across Hyde Road, are improved if the centre is to function as an integrated whole.

iii) Management

5.95 If the main shopping area is redeveloped, and wider opportunities at the western end of the centre realised, this will inevitably result in a shift of focus away from the eastern end of Gorton. Uses along Hyde Road to the east of its junction with Wellington Street are fragmented and have little functional relationship with the rest of the district centre and this area should be excluded from its definition (see discussion below). Uses along Wellington

Street, including those around its junction with Cross Lane, should be more fully integrated with the centre and indeed the relocation of a number of these – including for example the Post Office, Martins the baker, and Cohen's Chemist to consolidate their operation – to take up space within a redeveloped shopping centre should be encouraged.

5.96 Paradoxically, whilst Gorton is well served by buses, the proportion of people arriving by public transport is comparatively low, and the accessibility of the centre by public transport achieves a lower than average rating. The comprehensive redevelopment suggested above would offer the opportunity to improve public transport access by creating a nodal point at the heart of any new scheme. Opportunities to bring buses into the heart of the centre, as an important part of any master plan proposals, should be carefully explored [6].

5.97 If the development opportunity associated with land between Whitwell Way and Wellington Street is realised, it will be important to ensure that the significant opportunity for a wider package of benefits associated with the scheme should be realised.

5.98 Equally, should major intervention not come forward an appropriate management response must be considered. In this situation, as suggested above, it is questionable whether environmental improvements alone would have the desired effect of arresting or reversing the decline of Gorton as a district centre. In the absence of major development intervention, the centre should be monitored closely, paying particular regard to the future of the unit currently occupied by the Co-Op [6]. A new occupier here may serve to revive the centre somewhat, but equally, in the wider context of how other district centres in Manchester function and operate, the continued deterioration of the centre could warrant it being reassigned as a local centre, focused around the junction of Wellington Street and Cross Lane. Every effort should be made to avoid this eventuality as those living in Gorton would be faced by a situation where their needs would be extremely poorly met – particularly given that the nearest existing defined local centre at the junction of Hyde Road and Reddish Lane is of an extremely poor standard.

5.99 In this context, future decisions about the management and development of Gorton should have regard to its relationship with the nearby Hyde Road / Reddish Lane local centre. In qualitative terms, this centre falls some way short in fulfilling its designated role, and would benefiting from consolidation and improvements to its relationship with the hotel / pub /

health club development opposite. Any strategy for action in Gorton should seek to support this [1, 6].

iv) Centre Boundary

5.100 The district centre boundary should be redrawn [3]. There is merit in truncating the centre as defined to the east, particularly along Hyde Road beyond its junction with Wellington Street and Hengist Street. Elsewhere, the centre boundary should be reviewed in the context of the viability and prospect of delivery of the major development opportunity described above. With this development in place, there may be merit in a redefinition of the centre boundary to exclude units east of Sibley Street and north of Cross Lane, and units on the eastern side of Wellington Street, with a number of key uses here relocated to the new development. Equally, if the development comes forward, the inclusion of the library and former public baths should be considered. Without this development in place, and potentially in parallel with redefining Gorton as a local centre, a much tighter centre boundary, focused around the junction between Wellington Street and Garratt Way/Cross Lane may be appropriate.

v) Land Assembly

5.101 Public and private ownerships will be involved in the development opportunities identified above. Key issues would include whether specific developments could be undertaken within individual (rather than separate) ownerships. The simplicity offered by single ownership would need to be balanced against the benefits associated with wider, more comprehensive opportunities.

vi) Key Agencies

5.102 In addition to Manchester City Council, the key players involved in the future of Gorton will be an appropriate development partner tasked with bringing forward the comprehensive redevelopment of the centre. Equally, given the importance of securing an appropriate main food anchor, enhancing the range of non food shopping, providing more private services and improving the leisure offer and evening economy, a wide forum of future and existing occupiers should clearly be closely involved as plans for the centre evolve [6].

5.103 Key amongst these would be the main food operator. In the context of the opportunity to improve public transport access to the centre, and the requirement to enhance pedestrian access, there will be an important role for GMPTE and the MCC Highways team. Finally, NEM may also have an important role to play in the future.

vii) Immediate Priority

5.104 The viability of the proposed redevelopment of the shopping centre area should be carefully explored at the earliest opportunity. A deliverable master plan for the centre should be worked up, driven by the identification of a suitable development partner, and key occupiers. Gorton is identified (section 4) as falling within a "development priority area", forming part of the eastern area, broadly defined to also include Openshaw and Newton Heath / Miles Platting [2]. It is therefore recognised amongst all Manchester's district centres by this study as representing a particular priority for action, and recommended that action be coordinated carefully with that elsewhere in the eastern area.

5.105 Moreover, Gorton is classified (section 4) as a "minor district centre" within the suggested hierarchy of centres [1]. As such, it sits alongside some of Manchester's worst performing centres, and the aim should be to elevate it to "district centre status". This further underlines the view that it should be treated as a priority for action

6. HARPURHEY ACTION PLAN

Key Issues

5.106 Harpurhey performs strongly as a convenience retail destination anchored by a recently refurbished Asda superstore, complemented by both Iceland and Kwik Save. This is reflected in comparatively high visitation rates and expenditure on convenience shopping. However, the comparison shopping offer is comparatively poor, in terms of the number, range and quality of provision. This lack of non food shopping restricts the ability of Harpurhey to perform a more comprehensive district centre function.

5.107 Harpurhey is extremely well provided for in terms of public services, including for example a health centre, surgery, Police Station, plus employment, social services and other advisory and support facilities. Paradoxically however the proportion of visitors using the public services is below average. Moreover, the provision of private service facilities is low, and the proportion of visitors to Harpurhey using these services is well below average. The evening economy is poorly developed and with the exception of those visiting for food shopping, few people use the centre later in the day. However, underpinned by a strong food retail anchor, the key performance indicators for the centre point towards solid commercial viability.

5.108 The quality of the built environment is mixed, and whilst parts of the centre including the Asda store, and the petrol filling station and the McDonalds development at the junction of Moston Lane and Rochdale Road, have benefited from investment, other areas are of a poorer quality and in some cases in decline. For example, the Conservative Club, occupying an important location fronting Rochdale Road at one of the main pedestrian entrances to the centre, is run down and unappealing. Equally, the surgery and day centre at the junction of Church Lane and Upper Conran Street contribute little to the quality of the built environment. The wide, open expanses of car parking along either side of the Asda superstore are unwelcoming to pedestrians, and this problem is compounded by the centre "turning its back" on pedestrians, particularly from the Moston Lane side. The level and quality of soft landscaping throughout the centre is generally poor.

5.109 In retail terms, Harpurhey is an adequate centre, although its convenience offer is undermined by a very limited comparison goods shopping provision. Similarly, in inclusion terms, Harpurhey is broadly adequate, although its private service provision is poor and the performance of its wide ranging pubic service provision appears to be sub-optimal. A comparatively high proportion of those using the centre consider that it has become less attractive in recent years, and this perception of decline is an area of some concern that should be addressed.

Identifiable Solutions

i) Development

5.110 A comprehensive redevelopment scheme for Harpurhey is being brought forward by St Modwen in partnership with Manchester City Council, Asda, and working with the Police and Surestart. From the plans we have seen of the scheme, and the discussions we have had with St Modwen, their proposals would appear to address many of the issues highlighted above.

5.111 In retail terms, approximately 120,000 sq. ft of new accommodation in 3 separate blocks is to be provided, and is currently under construction. It will include:

- Eleven units ranging from 4,000 sq. ft to 20,000 sq. ft arranged in a reverse "L" shape extending back from Rochdale Road through the area currently occupied by the Police Station, market hall and open market, then extending south behind the health centre to Church Lane.

- A row of 9 retail units (one of 4,000 sq. ft and eight of 750 sq. ft) immediately to the east of the Manchester Social Services building, behind the existing mall and fronting the car parking area off Moston Lane.

- A freestanding 11,250 sq. ft unit immediately to the south of Asda.

5.112 The existing market within the centre is popular with shoppers and this is being relocated to an open air facility to the south of the freestanding unit described above. The layout and orientation of the retail development will define a clear focus for the centre and establish much stronger north south and east west links through its core. It will also make it more outward facing and welcoming to shoppers. The row of nine units described above will face towards Moston Lane, and a new entrance to Asda will also be constructed to face this direction.

5.113 A number of pre-lets have been secured for the retail accommodation, and whilst these are focused on the value end of the market (e.g. Wilkinson, B&M Retail, and In The Pink) they will nonetheless provide the wider range of comparison goods shopping currently lacking in Harpurhey. A deal has also been signed with Farm Foods, and this will further strengthen the convenience offer in the centre.

5.114 In terms of the public service and leisure offer, the Police Station fronting Rochdale Road is making way for the 11-unit mall described above; it is understood that Wilkinson will occupy the key gateway unit to be accommodated on this part of the site. The new Police Station, just outside the defined centre, at the junction of Upper Conran Street and Batley Street, is now open.

5.115 On the opposite side of Upper Conran Street, inside the district centre boundary, a new 35,000 sq. ft leisure facility is under construction. This will accommodate a range of public leisure facilities including a sauna, solarium, gym, rooms for aerobics and other exercise classes, and also a swimming pool with an innovative floating floor feature allowing the depth of the water in the deep end to be adjusted to meet the needs of users. Importantly, this building will also accommodate a Surestart facility. Overall, this building will represent an important community resource providing much needed leisure facilities, and a service to families, acting as an anchor attraction to the benefit to the rest of the centre as a whole.

5.116 The redevelopment proposals also include a raft of much needed environmental improvements. The pedestrian malls and car parking areas will be upgraded and the layout revised. In the car parks, new pedestrian walkways will be provided, speed retarders introduced, and disabled parking improved. Accessibility will also be enhanced by improvement to road junctions surrounding the centre, and the provision of new taxi rank facilities. New landscaping, the installation of CCTV, and new fencing will create a safer and more attractive environment.

5.117 A similarly comprehensive treatment of another key development site at Harpurhey – the listed former public baths north of the junction between Moston Lane and Rochdale Road – is anticipated. A planning application has been submitted by the Manchester College of Arts and Technology for a new £8.9 million 6th Form College Facility for more than 500 students on this site. This would involve new buildings as well as the remodelling of existing premises to ensure that key features of the old baths are retained. The overall shape of the building would remain intact, with the male baths replaced by an exhibition hall. The new development may also offer the opportunity for new facilities such as a library, open to the general public. We understand that English Heritage supports the scheme, and that it has been approved subject to referral to the Government Office.

5.118 Clearly, if this facility comes forward, it would represent a very significant community resource and secure the beneficial reuse of an important landmark building. It would also attract a significant number of students, staff, and other visitors to the area, improving the viability of the district centre as a whole.

5.119 The only important elements of Harpurhey excluded by both the St Modwen and public baths schemes are the health centre at the junction of Church Lane and Rochdale Road, the surgery and mental healthcare day centre at the junction of Church Lane and Upper Conran Street, and the other public services embedded within the centre. The opportunity may be explored to relocate these within the district centre through a joint service delivery vehicle, possibly through the Local Improvement Finance Trust (LIFT) initiative.

5.120 The health centre could potentially be located at the southern end of Harpurhey on the site currently occupied by the surgery and day centre. Relocating the health centre here would release a relatively large site with a high profile frontage onto Rochdale Road. Equally, relocating some of the other public services from within the centre would release further space well related to the retail core offering the potential for further development.

5.121 Looking further into the future, the successful regeneration and repopulation of the wider area may bring pressures on the existing provision within the centre, and the need for additional retail and service facilities. If these facilities cannot be located within the centre, then sites in areas adjacent to it, to the east of Rochdale Road (e.g. north of Moston Lane, east of Upper Conran Street, or south of Church Lane) may be considered, subject to the ongoing strategy at that time for the uses in these areas (primarily educational and residential).

ii) Environmental [5]

5.122 As discussed above, the regeneration of the district centre will include a wide range of much needed environmental improvements. With these in place, it is likely that the requirement for further works in-centre will be limited, although more general improvements to the landscaping and appearance of the Rochdale Road corridor at Harpurhey would be beneficial.

iii) Management

5.123 The partnership relationship between St Modwen and the City Council provides a model of how improvements to other district centres could be delivered. This relationship is set to create a regenerated centre, which addresses many of the current weaknesses of Harpurhey and the replication of this approach elsewhere may offer similar advantages [6].

5.124 It will be important to monitor and measure the effect of the St Modwen scheme on the centre's future performance. We would therefore recommend that Harpurhey be revisited and fresh research undertaken once the development is complete and the centre has been open and trading for some time to establish settled trading patterns (say, September/October 2005). The performance of the 'new' centre could then be benchmarked against that of the current centre as highlighted by this research, to provide an indication of the extent to which this revised district centre model better meets the needs of local people [6].

5.125 The development of Harpurhey may have implications for the nearby Worsley Avenue / Kenyon Lane local centre. This centre is overly elongated and suffers in part from extended vacant frontages and poor quality accommodation; it would benefit from consolidation. The future management and strategy for action in Harpurhey should seek to support this [1, 6].

iv) Centre Boundary

5.126 The district centre boundary should be modified [3]. In particular, whilst the current boundary includes land to the west of Rochdale Road, this area has little functional relationship with the rest of the district centre and could reasonably be excluded. However, there is merit in retaining within the defined centre the former public baths and the units at the junction of Hemsley Street South and Moston Lane.

v) Land Assembly

5.127 In the context of the ongoing developments described above, it is not anticipated that further land assembly would be required in the immediate future.

vi) Key Agencies

5.128 In addition to Manchester City Council, the key players involved in the future of Harpurhey will be St Modwen, as they bring forward the regeneration of the centre. Given the anchor role of Asda, the presence of other key retailers such as Kwik Save and Iceland and the anticipated introduction of other national multiples such as Wilkinson, a forum of occupiers should be consulted closely as the centre continues to evolve. Equally, Manchester City Council Leisure and the Manchester College of Arts and Technology will have an important role in this regard [6].

vii) Immediate Priority

5.129 With the main regeneration scheme now underway – the new Police Station is complete and work on the rest of the site is under way – the immediate priority is to work with the Manchester College of Arts and Technology to facilitate their reuse of the important public baths buildings and site, which would bring further significant levels of investment to Harpurhey.

7. HULME ACTION PLAN

Key Issues

5.130 Hulme is a modern district centre which was built following the regeneration of the Moss Side area and effectively it replaces the former Moss Side district centre provision. Given this context, one of the key issues affecting the centre is a lack of additional non food shopping, within the main comparison offer limited to a the Asda foodstore and the catalogue shopping store. This lack of retail diversity may also be a result of the greater propensity for people to use cars when visiting the centre, i.e. this being linked to main food shopping trips, with less use of public transport occurring.

5.131 In addition, there is a lack of non retail facilities in the centre for visitors and workers alike. For example, a notable issue arising from on-street survey results was a lack of a crèche facility. With the likely increase of the occupation of the Birley Fields complex, immediately adjoining the centre, and the large employment area to the east (the brewery) the potential for this facility (and possibly others) may need further investigation.

5.132 The centre also suffers from a poor parking environment to the rear of the core retail area, particularly around the leisure centre area. The underground parking is extremely unwelcoming and the environment at surface level is also of very poor quality.

Identifiable Solutions

i) Development

5.133 Hulme district centre still has opportunities to develop and improve in the future. There continues to be an undeveloped site immediately adjoining the main car park which could be developed for either non-food or non-retail facilities or a combination of both. This would give the centre better definition and enclosure especially around the car park. The potential to incorporate a nursery opportunity within this area could be investigated as part of an overall development package.

5.134 In addition, the area incorporating the leisure centre and fire station might be considered as an obvious expansion area for the centre. However, we are aware that the future requirements of the Fire Authority may mean that this facility should remain in situ. Nevertheless, the quality of the leisure centre and associated maintenance costs will need to be considered further. The incorporation of this area into the centre certainly forms a natural boundary to the south of the site and the development potential should be considered further. For example, improvements/refurbishment of the leisure centre may form part of a package of initiatives, promoted in conjunction with an ongoing public sector commitment to improve the range of services provided in the centre.

ii) Environmental [5]

5.135 As part of identifying a new development opportunity to the south of the centre, there is a need to improve significantly the car parking environment and its surface treatment. In particular, the underground car parking arrangement would need reconsidering and potentially closure is one option. As an alternative, parking facilities could be remodelled as part of a project for future investment in the leisure centre.

5.136 If development were to be brought forward on the open land adjoining the car park then there would be a need to reconsider the boundary treatment of the centre, particularly with the removal of the fencing along the perimeter of the car park. Although security is very strong, pedestrian connectivity with any new development in the centre needs to be maintained. This factor is also relevant to enhancing the linkages to the surrounding area, with stronger pedestrian connections needed to the centre from the west and south if customers are to be attracted to an environment which is perceived to be safe and secure.

iii) Management

5.137 The ability to bring in public transport to the site on a more regular basis is a challenge. Bus operators rarely extend routes or divert services unless there is a commercial opportunity to exploit. However, if further development were to be brought forward that created an even more attractive destination for retailers, then the possibility of new/enhanced public transport routing may also increase accordingly. Potentially, this could be actively pursued at the time of promoting any additional new development, initially either through planning or through early discussions with the bus operators.

5.138 The opportunity to bring forward increments to service provision, such as a crèche, may require the collaboration of key occupiers and interested parties in the area [6]. This, for example, could include Asda, the brewery, and occupiers at Birley Fields (eg Michelin). The opportunity for this to be funded in part by a public sector programme needs to be assessed. In turn, this may help to attract a particular service operator. Again however, it may require additional facilities to be put in place first, so as to drive the centre forward in retail terms. This can then assist by building a critical mass to attract such a facility, especially if it were to be private sector led.

5.139 The alternative would be for public sector provision to be carried forward as a priority at the centre and this may need to be linked to any improvements to, or refurbishment of, the leisure centre.

5.140 Future decisions about the management and development of Hulme should have regard to its relationship with the nearby Claremont Road local centre. This centre is identified above (section 4) as falling some way short in fulfilling its designated role, and removal of local centre status is suggested, in conjunction with designation of a new local centre as part of the Maine Road stadium redevelopment. Any strategy for action in Hulme should seek to support this [1, 6].

iv) Centre Boundary

5.141 There is a requirement to have a clear centre boundary for Hulme district centre and in particular consideration should be given to including the leisure centre to the south [3]. A more wide ranging opportunity would be to include the entire Birley Fields area. However, this would extend the centre by a significant size and it may be more appropriate for it to be condensed with Greenheys Lane West to the north then Moss Lane East to the south forming the boundaries.

v) Land Assembly

5.142 Both public and private ownerships would be involved in the potential development opportunities identified above. Key issues would be whether a specific development could be undertaken within individual land ownership areas as opposed to requiring the assembly of several land interests. A larger scale/more comprehensive opportunity may come forward, but in the short/medium term, the initiatives defined above may not need extensive land assembly work.

vi) Key Agencies

5.143 As noted above, the key agencies for the City Council to approach to discuss the opportunities will be the Fire Authority and the existing occupiers with surrounding interests, notably those at the brewery and Birley Fields.

vii) Immediate Priority

5.144 The catalyst for the future improvement of Hulme centre will undoubtedly be the opportunity to create additional critical mass which can then offer further retail (non-food) occupation. This would in turn provide the opportunity to increase non retail facilities, potentially further environmental improvements as well as enhancing public transport accessibility. This is important in terms of seeking to ensure that the potential for the Asda store to anchor a more rounded district centre function is capitalised on.

5.145 We would recommend that potential developer interest is explored further to identify whether this could lead to some form of public/private partnership with Manchester City Council to facilitate delivery of a number of opportunities, as indicated above [6].

8. LEVENSHULME ACTION PLAN

Key Issues

5.146 Levenshulme is one of the largest district centres in the Manchester City area, although it suffers from a high unit vacancy rate. The centre comprises a very long strip of outlets stretching along the A6 corridor, and there is little definition to the centre.

5.147 Many of the units are of poor quality and are inadequately configured for modern retail uses. There have been some environmental improvements along the street, with particularly notable improvements to the streetscape as well as parking improvements. However, so far the actions taken appear to be somewhat disjointed in nature.

5.148 Critically, the centre does not benefit from a strong focal point and this issue, is exacerbated by the elongated nature of the centre.

5.149 The centre does, however, benefit from a wide range of facilities and has a degree of specialism, with antique shops and furniture shops clustered towards the southern end of Levenshulme. This is reflected in its designation as a “major district centre” within the hierarchy suggested above (section 4) [1].

Identifiable Solutions

i) Development

5.150 A critical area for potential change would be adjacent to and around Levenshulme Station, where there is scope to provide better quality units for retail and/or public services. The station does provide a central point that could be exploited further as a focus for the centre.

5.151 If new units can be developed at the Station this will create an initial foundation on which Levenshulme can build. Then through direct public intervention or by partnership with the private sector, there may be an opportunity to relocate fringe occupiers to a more central area. This in turn could lead to the conversion of peripheral buildings to alternative (e.g. residential) use.

5.152 There is a large single development site (comprising in part leisure a centre/garage) to the west of Stockport Road which could provide the opportunity for new retail and/or public facilities.

ii) Environmental [5]

5.153 There is a clear opportunity to continue with interventionist policies to enhance the quality of shop frontages and existing buildings. This has already occurred in parts of the centre, but could be a more widespread initiative, to achieve a positive overall effect. This work needs to include further streetscape improvements around the centre with particular emphasis on the central core, either side of the station. There also needs to be strong and safe pedestrian linkages to Levenshulme Station to take advantage of its location, and connectivity to the centre (and other locations) in the future.

5.154 Consideration needs to be given to the amount of car parking provided for Levenshulme. In particular, the Council needs to evaluate whether this could be exploited for further development opportunities or rationalised in another way, having regard to management/other objectives.

5.155 There is also a further opportunity to concentrate environmental improvements around another significant attraction – namely the antique/furniture type businesses that have clustered together towards the southern end of Levenshulme. This area could provide an effective secondary focus for the centre, and a slightly different brand/identity could be promoted through different streetscape improvements.

iii) Management

5.156 Given the size and complexity of Levenshulme centre, we consider that there is a strong case to consider a ‘centre manager’ or a ‘business improvement district’ approach to help shape its future needs. For the latter, there are however a significant number of independent traders which makes this approach more complex to take forward. Securing stakeholder commitment from these operators – and others – to such initiatives will be crucial. There may also be an opportunity to bring together the key antique/furniture traders to understand whether they might pursue specific improvements for their own benefit, as well as to help the centre overall [6].

5.157 Future decisions about the management and development of Levenshulme should have regard to its relationship with the nearby Kingsway / Slade Lane and Dickenson Road / Anson Road local centres. These centres are identified above (section 4) as falling some way short in fulfilling their designated role, and potentially benefiting from consolidation. Any strategy for action in Levenshulme should seek to support this [1, 6].

iv) Centre Boundary

5.158 The centre boundary is too elongated and lacks focus and should be revised [3]. There is an opportunity to consolidate the boundary in parts to the southern end and also to consider whether the centre itself should be rebranded as two distinct areas (ie Levenshulme Central – focused around the station) and Levenshulme South (focused around the antique trade area). We consider that there would be merits to such an approach.

v) Land Assembly

5.159 For any intervention which is designed to create better quality units for non-food retail/food retail and public services then multiple land ownerships are likely to be required. The Council's compulsory purchase powers may therefore need to be exercised so as to bring forward appropriate solutions.

vi) Key Agencies

5.160 The focus for future improvements to Levenshulme will probably be centred around management initiatives in the first instance to help drive forward new environmental opportunities. This approach would need to be led by the Council, working in conjunction with key stakeholders and occupiers in the centre [6]. A more targeted approach to considering frontage improvements/relocation/focal points could therefore be brought forward as appropriate and a structured public realm strategy, pursued as a result of this new Council-led strategy.

5.161 Greater connectivity/accessibility and use of Levenshulme Station should also be pursued with GMPTE/ Network Rail.

vii) Immediate Priority

5.162 There is a need to focus on the number of vacant outlets that exist across the centre and link this to a strategy for either reoccupation/reconfiguration and consolidation. Given the number of vacant units that exist, it seems likely that there will be opportunities to facilitate relocations around the centre that create a more coherent occupation pattern. Although this initially has to be management driven, it is essential that the key occupiers are involved. Despite the fact that there are a large number of private traders, the opportunities for introducing a 'business improvement district' or similar initiative, could also be considered as a further catalyst to facilitate environmental/other improvements in the medium term.

9. LONGSIGHT ACTION PLAN

Key Issues

5.163 Longsight District Centre provides a main food retail focus for the A6 Corridor linking to Levenshulme (noting that Levenshulme only has discount retailers and no main foodstore). However, the Asda store at Longsight, although undoubtedly an important anchor, is not optimising its positive impact on the centre due to its somewhat hidden location.

5.164 In addition, although there are numerous public service buildings in the centre, it would appear from survey work that these are not used as often as might be expected. Therefore, the opportunity may arise to consolidate the number of buildings in Longsight used for public service purposes. This may benefit the public through providing more integrated services.

5.165 The pedestrian link between Asda and the market (this also being a vital part of Longsight centre) is poorly defined. Although some directional/information signage is provided as part of the streetscape, this is not as clear as it could be.

5.166 The centre is split by a busy road and there is noticeable traffic congestion. This is exacerbated by current access arrangement for the Asda car park, which is narrow and to the rear of the centre. This car park itself is not readily connected to the centre overall and access to the Asda service area also conflicts with pedestrian movement.

Identifiable Solutions

i) Development

5.167 It is understood that a discount retailer is due to occupy the open land immediately south of the Asda store and, in physical terms, this will be highly beneficial in improving the overall impression created by the centre, especially as this open land has been considered an eyesore for a long time. Beyond this however, there are no immediately obvious future new development opportunities in Longsight district centre. The most recent opportunity, at the very southern tip of Longsight has now been completed, for office and retail uses.

5.168 The future key ‘focus’ areas revolve around the access to, and poor visibility of, the Asda store and the number of public service uses that are present in the centre.

5.169 Ideally the Asda store would benefit from a direct entrance off Stockport Road. However, the buildings fronting Stockport Road are all public service facilities and are relatively modern, so this may be difficult to achieve.

5.170 Although we are concerned over the potential viability of a radical public sector solution, we believe that investigating the feasibility of consolidating public sector service facilities in fewer buildings, combined with the opening up of a better quality access to the main Asda car park may be an appropriate step. Through this process an opportunity may arise to reconsider the servicing arrangements for Asda, and to find ways to better connect the car parking facilities for pedestrians to the remainder of the centre.

ii) Environmental [5]

5.171 There are clear opportunities to improve shop fronts along much of the centre (noting that many are in private ownership) as well as scope to enhance the overall quality of the streetscape and pedestrian circulation.

iii) Management

5.172 The evaluation of the options for a major intervention will require the development of close working ties between Manchester City Council and Asda to determine whether this is feasible [6]. Although we understand Asda has previously been approached on this matter in the past, if a commercial advantage can now be demonstrated to them then this option should be considered again in more detail. If there can also be a medium or longer term cost saving to the operation of a range of public service facilities for the Council, this may also act as a catalyst for change.

5.173 A stronger definition to the centre, possibly with gateway areas being established, could also be considered particularly at the northern end of the main junction with St Johns Road. In addition, the market at Longsight could be further utilised in a promotional exercise for Longsight overall.

5.174 Future decisions about the management and development of Longsight should have regard to its relationship with the nearby Kingsway / Slade Lane and Dickenson Road / Anson Road local centres. These centres are identified above (section 4) as falling some way short in fulfilling their designated role, and potentially benefiting from consolidation. Any strategy for action in Longsight should seek to support this [1, 6].

iv) Centre Boundary

5.175 There may be a requirement for a limited modification of the defined boundary to the northern end of the centre possibly to encompass its newly-defined gateway points.

v) Land Assembly

5.176 There is limited land assembly action required as any major opportunities appear to be linked directly to Manchester City Council ownership. However, as indicated above, this means that a clear policy on relocations or consolidation of Council facilities will be needed at the outset.

vi) Key Agencies

5.177 As noted above, the main agencies required for a radical improvement to Longsight would be the City Council and Asda. However, it may also require the input of the Health Trust (as an occupier of one of the buildings) and close liaison with the Manchester Markets Manager over future operation of the centre [6].

vii) Immediate Priority

5.178 The first priority is to test in detail the potential to consolidate public service facilities into less or even a single building. This could then provide the stimulus to reconsider the access problems into the main Asda car park and the frontage to Stockport Road.

10. NEWTON HEATH ACTION PLAN

Key Issues

5.179 In overall terms, Newton Heath is holding its own as a district centre. The representation of convenience outlets is above average, and although the absence of a large supermarket or superstore contributes to comparatively low usage of the centre for food shopping and in particular main food shopping, the centre does benefit from the presence of three national multiple supermarket chains (Kwik Save, Netto and Iceland). The representation of comparison outlets is in line with average, as is the provision of public service facilities. However, a key weakness is a lack of private service and leisure outlets, although overall visitation rates associated with service uses are comparatively high. Notwithstanding the presence of a number of pubs and social clubs the evening economy is comparatively poorly developed.

5.180 The overall performance of the centre points towards fragile commercial viability. For example, average spending on both convenience and comparison goods in the centre is well below average. The vacancy rate is also comparatively high with almost 1 in 4 units lying empty. A comparatively high proportion of those using the centre consider that its overall attractiveness has declined in recent years. For these reasons, the continued vitality and viability of Newton Heath is in our view a matter of some concern, and intervention is required if further decline is to be avoided.

5.181 A further important issue is that the centre as defined is extremely disjointed, with the main concentration of unit shopping south of the canal divorced from the Oldham Road area by the lack of coherent development to establish a relationship between the two. Equally, the stretch of the centre along Oldham Road from beyond the Job Centre in the west to McDonalds in the east lacks definition and a clear focal point, and is functionally and physically distinct from the main shopping provision. Oldham Road acts as a barrier between uses to the south and uses to the north. In general terms traffic issues, including volume, congestion, danger and a poor pedestrian environment all feature very strongly with regard to the aspects of Newton Heath disliked by those who use it.

5.182 Equally, the overall quality of the urban environment is less than adequate. Some two-thirds of those using Newton Heath identified street cleanliness as a key area for improvement. Equally, improved planting of trees and flower displays and better landscaping was identified by over one-fifth of Newton Heath shoppers as an area of improvement – more than twice the overall average across Manchester's district centres.

5.183 Overall, Newton Heath is performing adequately in terms of both its retail and inclusion roles. However, improvements are required particularly in terms of its private service provision, if its commercial viability is to be underpinned and its future ability to perform a district centre function is to be secured. Newton Heath benefits from the presence of a number of potential development sites, and these should be exploited to support its vitality and viability.

Identifiable Solutions

i) Development

5.184 Property bounded by Dulverton Street, Old Church Street and Oldham Road is currently in a poor state of repair, accommodating a number of vacant units and, with the exception of the Co-Op Pharmacy, poor quality uses, and contributes little in terms of any potential gateway role into the rest of the district centre. Equally, land to the east of Dulverton Street and to the south including the Kwik Save store and rough car parking area to the rear is under used and is instrumental in disrupting the relationship between the main body of the district centre to the south of the canal, and Oldham Road to the north.

5.185 The redevelopment of this land would present the opportunity to address a number of the issues outlined above. A mixed use scheme including residential, private services and leisure, and retail, would be appropriate. With careful attention to design and layout of such a scheme, and the orientation and positioning of units, it would be possible to create a strong frontage along Old Church Street north of the canal to link the existing unit shopping up to Oldham Road, and create a strong landmark feature at the junction of Old Church Street and Oldham Road to draw shoppers into Newton Heath.

5.186 Such a scheme may include the replacement of the existing Kwik Save outlet with a more modern small or medium sized supermarket, although this is less of a priority for Newton Heath. Whilst as part of a wider mixed use development an element of retail should be supported here, it is of vital importance that the scale, function and format of the proposed stores and overall mix of uses be carefully analysed, and this analysis be subject to detailed scrutiny. It is important to ensure that development at this highly prominent location serves to compliment, rather than detract from the existing concentration of retail south of the canal. Equally, the implications of any retail development proposed here for other centres and other initiatives in the Oldham Road corridor should be carefully assessed.

5.187 It may be that a more comprehensive treatment of the land between Old Church Street and Droylsden Road north of the canal and south of Oldham Road is appropriate, although this would depend on consultation with existing businesses and landowners in this area. However, in the context of securing the future vitality and viability of Newton Health as a district centre there is no particular imperative to pursue any such wider scheme.

5.188 Other development opportunities we have identified include areas of currently under-used land at the southern end of the centre behind the main Old Church Street frontage. However, these sites – south of Millwright Street/west of May Street, and south of Great Newton Street/west of Droylsden Road – are very secondary from a commercial point of view, and appear better suited to residential development.

5.189 Finally, we have considered the potential of the market area east of Smallward Street and south of the canal. However, given the popularity of the market as a key attraction within the centre (see discussion below) there is less merit in seeking to bring a scheme forward.

5.190 Given the nature and extent of these opportunities, and the particular needs of Newton Heath, we recommend (section 4) that specific policy support should be given to encourage development at this location [4].

ii) Environmental [5]

5.191 Environmental improvements are fundamental to reinforcing the attraction of Newton Heath as a district centre. For example, the canal is currently disused and in a state of disrepair and acts as a barrier between the southern and northern halves of the centre. A programme of restoration to this stretch of the canal including opening up and improving pedestrian access along its banks would capitalise on it as an asset and help to integrate the northern and southern parts of the centre. Equally, it would present a more attractive setting to the potential development opportunity described above and help to create a stronger link through to the market area. Some 51% of those using Newton Heath identified the market as a key attraction of the centre and the opportunity should be taken to improve its setting.

5.192 The stretch of Oldham Road between the Job Centre and McDonalds is fragmented and punctuated by vacant and semi derelict plots, including land to the west of the Job Centre, land between Dixon Street and Dean Lane, the vacant former petrol filling station and disused car wash at the junction with Reliance Street, and the former petrol filling station with a scrap yard to the rear at the junction with Rothwell Street. Considered as a whole, and together with vacant premises such as the former L'Oreal warehouse at the junction of Dean Lane and Oldham Road and units at the junction of Hopwood Street and Oldham Road, it creates an unattractive urban environment contributing to a negative perception of the area, and the view that the centre has become less attractive in recent years. A programme of clearance and landscaping, or at the minimum, basic site maintenance, would be helpful in reducing the negative impact of these sites.

5.193 Coupled with this, the importance of basic maintenance of the rest of the built environment cannot be overstated. Newton Heath suffers from a poor standard of street cleanliness, and this features very strongly as an area for improvement amongst those using the centre. Allied to this should be improvements to the hard and soft landscaping of the area, both along Oldham Road and Old Church Street, which are currently of a less than adequate standard.

5.194 Improvements to the pedestrian environment are also necessary. Pedestrian priority measures in both the Old Church Street and Oldham Road areas are required to integrate the centre more fully.

iii) Management

5.195 If the development opportunity in the Dulverton Street area comes forward, it will be important to ensure that the significant opportunity for a wider package of benefits associated with any such scheme should be realised. Furthermore, the scale, function and format of any retail development in this location or elsewhere in Newton Heath should be scrutinised so as to ensure full coordination and compatibility with the provision elsewhere in the Oldham Road corridor and wider NEM objectives [6].

iv) Centre Boundary

5.196 The district centre boundary should be redrawn [3]. There is merit in seeking to refocus the centre along Old Church Street, and redevelopment of the Dulverton Street area would help to achieve this. The physical and functional relationship between the main body of the centre on Old Church Street and units along the north side of Oldham Road is comparatively weak, and there may be merit in excluding this area from the district centre boundary. Elsewhere, the boundary should be "tidied up" in a number of areas. This would include for example the redefinition of the boundary to exclude the residential units to the west of the health centre, the car park serving Jenson Carpet World, and potentially land to the south of Millwright Street and west of May Street.

v) Land Assembly

5.197 Public and private ownerships would be involved in the development opportunities identified above. It is anticipated that these would be limited in number, although land assembly would be more complex if the wider development potential of land between Dulverton Street and Droylsden Road was explored.

vi) Key Agencies

5.198 Manchester City Council in their role as Planning and Highways Authority, and NEM, have an important role to play in bringing forward the solutions identified above. Equally, if the potential of the canal is to be realised, there may be an important role for British Waterways.

Bringing forward a mixed use scheme as detailed above would require the identification of a development partner and potentially the involvement of a housing association [6].

vii) Immediate Priority

5.199 Realising the potential of the Dulverton Street area as a gateway to Newton Heath is key. The viability of the redevelopment of this area should be established, driven by the identification of a suitable development partner and the land assembly issues involved. Newton Heath and neighbouring Miles Platting are identified (section 4) as falling within a "development priority area", forming part of the eastern area, broadly defined to also include Gorton and Openshaw [2]. It is therefore recognised amongst all Manchester's district centres by this study as representing a particular priority for action, and recommended that action be coordinated carefully with that elsewhere in the eastern area.

11. Northenden Action Plan

Key Issues

5.200 Northenden centre is beginning to evolve further, with a greater diversity of uses coming forward including the introduction of more A3 uses. It has seen changes to retailing in the centre with the introduction of a Tesco Metro which provides a strong local shopping facility.

5.201 However, it does not have a high number of public service facilities to offer the local community; it has a (relatively) low level of retail expenditure; and is perceived to be congested due to the narrow main road through the centre.

5.202 It is also a very constrained centre with limited opportunity for change given the close proximity of residential areas on either side.

5.203 Recently there have been some changes to access for the centre involving the creation of dedicated parking areas off a separate access road adjacent to the main road. This is helpful for 'drop-in' trade but consequently public realm areas, and the quality of streetscape generally suffers from the dominance of the car parking and impact from traffic overall.

Identifiable Solutions

i) Development

5.204 Subject to further rationalisation in the petrol service trade, the petrol filling station on the corner of St Hilda's Road/Palatine Road could be a clear opportunity for new development (ie food/non food or public service) in the future. The major development area that may require further detailed consideration focuses on land to the north east of the centre which is currently occupied by a disused garage, a garden centre, back land car parking (sometimes used as parking for the centre). There may be flood risk associated with this area and to achieve a strong frontage there will be the requirement to include existing occupied units fronting Palatine Road (including Currys). It is understood that a housing led scheme is being proposed on this site at the current time. Any opportunities to explore a greater diversity of land uses, particularly retail and/or public facilities, should be taken up with the developer.

ii) Environmental [5]

5.205 The area between Heyridge Drive and Langard Road is a focal point for the centre and thus has separate car parking facilities. This should be considered further for stronger streetscape improvement (noting that that seating areas simply face the main road with cars either side). Ideally the centre should be "softened" in environmental terms, perhaps through the introduction of landscaping and some (limited) parking reductions or changes.

iii) Management

5.206 There may need to be further consideration of controlling A3 uses in the future, as pressures for further conversion to such uses continues. This does need to be balanced however, with maintaining higher occupation rates and retaining or enhancing the quality of the units involved [7].

5.207 There are a limited number of national occupiers in the centre and the Council could consider the opportunity for introducing small-scale business improvement district measures across the centre, if the traders were supportive of this in broad terms.

iv) Centre Boundary

5.208 There is limited need to change the centre boundary. However, if future development were to occur to the north east of the centre then this may require changes to be made to reflect any development.

v) Land Assembly

5.209 If the development opportunity to the north east were to be realised and was technically feasible then there may be a need to incorporate several ownerships to bring a scheme forward. There may be a role for the City Council to play in this respect.

vi) Key Agencies

5.210 The major development opportunity identified should be promoted accordingly with the developers/occupiers. If this were not to be realised then the site could be improved, and redefined/promoted as a dedicated car park for the centre. New surface treatment and appropriate landscaping (as a shorter term measure) would also be useful so as to continue to make the centre more attractive.

vii) Immediate Priority

5.211 Apart from considering the development opportunity further, it would be beneficial to bring forward environmental improvements in the centre to further stimulate occupier and thus potential developer interest accordingly. Northenden, alongside Wythenshawe, is identified (section 4) as falling within a "development priority area" in the southern part of the city [2]. It is therefore recognised amongst all Manchester's district centres by this study as representing a particular priority for action, and recommended that action be coordinated carefully with that elsewhere in the area.

12. OPENSHAW ACTION PLAN

Key Issues

5.212 Of all the district centres examined, Openshaw faces perhaps the greatest challenges in terms of its retail and service offer, the quality of its shopping environment, and its ability to maintain its function as a viable district centre. In particular, the centre suffers from a comparatively poor quality and range of shopping in both the convenience and comparison sectors. The convenience offer is limited, and supermarket shopping is restricted to a single store (Kwik Save). Equally, the representation of comparison outlets is below average, the quality of provision is poor, then there is an absence of national multiple retailers.

5.213 The overall performance of the centre points towards borderline commercial viability. For example, average spending on convenience goods in the centre is below average, and average spending on comparison goods is well below average. The vacancy rate is exceptionally high – almost one third of units are vacant. In fact, the vacancy rate is almost double the average for all of Manchester's District Centres. Whilst visitation rates for both public and private services are encouraging, the representation of units in both these sectors is low. In our view, Openshaw operates at the margins in terms of its district centre function and decisive intervention is required if further decline is to be avoided.

5.214 A further key issue is the lack of definition and a clear focal point within the centre. The "natural" focal point is the crossroads between Ashton Old Road and Fairfield Road, but there is no landmark feature or anchor attraction here to raise it above the anonymous. The centre boundary extends some way to the east, and includes for example units beyond Beck Street characterised by fragmented uses including residential and a number of vacancies. Equally, to the west, the centre boundary extends as far as Lees Street, and includes for example low intensity uses on both the north and south sides of Ashton Old Road beyond its junction with Old Hall Street, which have little functional relationship with the rest of the centre.

5.215 The quality of the built environment is, generally, poor and notwithstanding the refurbishment of certain key units (e.g. 1328-1330 and 1319 Ashton Old Road) sponsored by the New Deal for the Community scheme, the overall quality of the shop fronts is poor. Particular areas of concern in this regard include the triangle of land between Old Hall Street, Old Lane and Ashton Old Road, whilst other units set back from the main road also contribute to the poor environment. A key example of this is the market at the junction of Stanley Street and Fairfield Road, with its walls, shutters, and barbed wire presenting a threatening appearance. A quarter of Openshaw shoppers identify the poor quality of the market as one of their key dislikes of the centre.

5.216 However, the most prominent issue raised by users of the centre was safety and security. Well over half of those who use the centre identified poor safety and security as a key dislike, and improvements in this regard also featured most strongly on the users' "wish list". Openshaw achieved the lowest rating amongst all district centres in Manchester in terms of safety and security, with particular concerns including the presence of young people loitering in the centre, and evidence of anti social behaviour.

5.217 In retail terms, Openshaw is a poor and declining centre. In inclusion terms, Openshaw is – by some margin – the poorest of Manchester's District Centres. Decisive action to address these issues is important in securing the future of the centre.

Identifiable Solutions

i) Development

5.218 We are aware of the proposals to redevelop the former Alstom Works off Fairfield Road to the north of the centre. It is anticipated that the development would be anchored by a food superstore, plus unit shopping, and would link into the heart of the centre by incorporating land between Buckley Street and Ashton Old Road. Clearly, such a development would address a number of the issues outlined above, including the range, and presumably, the quality of both convenience and comparison shopping, as well as providing a clear and distinctive focal point right at the centre of Openshaw.

5.219 For these reasons, the broad principle of such a development at this location should be supported, subject to a number of important considerations [8]. Crucially, the design of the development, its layout, and the orientation and positioning of units within the site must be carefully planned so as to link into and fully integrate with the Ashton Old Road frontage. This is of fundamental importance if the potential for spin off benefits is to be fully realised, and the new development is not to function as a freestanding retail destination to the detriment of the rest of Openshaw. The effectiveness with which this is achieved in any proposal will have an important bearing on how the development is considered in sequential terms.

5.220 Secondly, whilst the principle of retail development should be supported here, it is of vital importance that the scale, function and format of the proposed stores be carefully analysed, and this analysis subjected to detailed scrutiny. Whilst retail investment in Openshaw is to be encouraged, this should not be of the expense of other defined centres in the area including for example Droylsden, Sport City, and Gorton. Appropriateness of scale is an important consideration.

5.221 Whist we have not seen detailed plans for this proposal, and are unaware of the full extent to which it is anticipated other parcels of land between the Alstom Works and Ashton Old Road will be incorporated, this may also present the opportunity for a comprehensive treatment of the triangle of land defined by Turton Street, Old Lane and Ashton Old Road. This would offer the opportunity to present a strong, well defined frontage along a section of Ashton Old Road which is currently in a state of considerable decay.

5.222 In combination these development opportunities would create a clear focal point for the centre at the crossroads with the focus then continuing westwards along Ashton Old Road. Further opportunities may then be explored for partial or full redevelopment of land west of the Kwik Save car park as far as Lees Street to provide a strong anchor to the western end of the centre. This would allow more effective integration and linked business with the Matalan and Aldi development at the junction of Victoria Street and Ashton Old Road.

5.223 Given the nature and extent of these opportunities, and the particular needs of Openshaw, we recommend (section 4) that specific policy support should be given to encourage development at this location [4].

ii) Environmental [5]

5.224 A key aspect of environmental solutions to the problems faced by Openshaw should be a programme of shop front improvements. As discussed above, there are isolated examples where this has already taken place, but these are few and far between and a more comprehensive treatment is required to improve what is currently an unappealing shopping environment. Coupled with this, the importance of basic maintenance of the rest of the built environment cannot be overstated. Openshaw suffers from a poor standard of street cleanliness, and this is reflected in the widely held negative perception and reputation of the area. Allied to this should be improvements to the hard and soft landscaping of the area, which are currently of a less than adequate standard.

iii) Management

5.225 If the development of the Alstom Works comes to fruition, and wider opportunities at the western end of the centre are realised this will inevitably result in a further shift of focus away from the eastern end of Openshaw. Uses here are already fragmented, and the management over time of their change of use back to residential through the planning system should be encouraged.

5.226 If the major development opportunity associated with the Alstom Works comes forward, it will be important to ensure that the significant opportunity for a wider package of benefits associated with the scheme should be realised.

5.227 Equally, an appropriate management response should the Alstom Works opportunity <u>not</u> be realised should be considered. In this situation, the environmental works listed above should still be encouraged. However, in the absence of major development intervention, careful consideration should be given to downgrading Openshaw to local centre status. As discussed above, whilst Openshaw currently operates as a district centre its status as such is marginal. In the wider context of how other district centres in Manchester function and operate, the continued deterioration of the centre could warrant it being reassigned as a local centre.

iv) Centre Boundary

5.228 The district centre boundary should be redrawn [3]. There is merit in truncating the centre as defined to the east, particularly beyond Abbey Hey Lane and Beck Street. Elsewhere, the centre boundary should be reviewed in the context of the viability and prospect of delivery of the major development opportunity on the Alstom site. With this development in place, there may be merit in a redefinition of the centre boundary to the north - although this will depend upon the extent to which it integrates with the rest of the centre - and maintaining its extension to the west. Without this development in place, and potentially in parallel with redefining Openshaw as a local centre, a much tighter centre boundary focused around the junction between Ashton Old Road and Fairfield Road, extending as far as Old Lane and Kwik Save to the west may be appropriate.

v) Land Assembly

5.229 Public and private ownerships would be involved in the development opportunities identified above. It is understood that a programme of land assembly is underway.

vi) Key Agencies

5.230 In addition to Manchester City Council and NEM, the key players involved in the future of Openshaw will be St Modwen Developments Limited and Dransfield Properties Limited, i.e. the developers behind the proposed redevelopment of the Alstom Works. Equally, given the suggested shift in focus of the centre away from the eastern end and the parcels of land involved in the development opportunities identified above, a wide forum of existing and proposed future occupiers should clearly be closely involved as plans for the centre evolve [6].

vii) Immediate Priority

5.231 The viability of the proposed redevelopment of the Alstom Works should be firmly established at the earliest opportunity. As soon as this is confirmed, the scope of a professional assessment of the implications of this scheme should be agreed. Once this work has been completed, it should be subject to detailed scrutiny. Openshaw is identified (section 4) as falling within a “development priority area”, forming part of the eastern area, broadly defined to also include Gorton and Newton Heath / Miles Platting [2]. It is therefore recognised amongst all Manchester’s district centres by this study as representing a particular priority for action, and recommended that action be coordinated carefully with that elsewhere in the eastern area.

5.232 Moreover, Openshaw is classified (section 4) as a “minor district centre” within the suggested hierarchy of centres [1]. As such, it sits alongside some of Manchester’s worst performing centres, and the aim should be to elevate it to “district centre status”. This further underlines the view that it should be treated as a priority for action.

13. RUSHOLME ACTION PLAN

Key Issues

5.233 Rusholme district centre has some of the most distinctive characteristics of all the centres across Manchester and especially notable is the strong influence of Asian trade and also the lively evening economy. These factors provide significant strength to the centre, in terms of adding to popularity and visitation rates, and in this respect Rusholme is unique in terms of performing a valuable specialist niche role. However, the strength in this area presents certain limitations in terms of the centre's ability to perform a fully rounded "District Centre" role.

5.234 Significantly, there are no public service facilities in the centre and there is a low choice of non food shopping and large scale main food shopping facilities.

5.235 The centre also suffers from a generally poor overall quality of environment, particularly in terms of the streetscape. There is limited parking for the centre both on and off-street.

5.236 It is however highly unlikely that Rusholme can be significantly improved, in order to become a more "standard" district centre, with a fuller range and diversity of uses, primarily due to its constrained nature. The economy of the centre has evolved and adapted to its current form and this is unlikely to change radically in the future without significant intervention. As noted above, this is both a strength and a weakness.

Identifiable Solutions

i) Development

5.237 There are very few immediate development opportunities, which could enhance Rusholme and provide for a broader range of facilities. There would have to be significant intervention into areas of multiple private ownership (mainly housing areas) in order to create sites which would be large enough for new commercial or public facility provision. However, there are one or two larger sites such as the small business estate to the east off Dagenham Road and the factory off Moss Lane East that could be considered in the longer term.

5.238 We have identified a potential shortfall in main food retailing to the west of Rusholme centre [8]. Rusholme itself may not be able to provide such a facility due to ‘site availability’ constraints. We have noted the emerging strategy for the former Maine Road stadium, and also the Claremont Road corridor. This strategy may create an opportunity for local foodstore provision, albeit away from the established district centre, and this option will need to be considered carefully as part of the Brief for the redevelopment of this wider area.

5.239 In the context of the particular development challenges evident in Rusholme, and the needs of the area, we recommend (section 4) that specific policy support should be given to encourage development at this location [4].

ii) Environmental [5]

5.240 There is a need to consider intervention with regard to improving the streetscape and the quality of the environment. Coupled with this, consideration should be given to a better quality parking regime (perhaps utilising the width of the road to create more designated parking bays with a narrowing of the road in favour of pedestrians). It is understood that improvement works are planned and, if these are undertaken, they may address some of these immediate concerns. Once implemented, they will need to be monitored and assessed for their effectiveness.

5.241 Although the ‘evening economy’ nature of many of the outlets in the centre provides character later in the day (through illumination/signage etc) the overall shop front quality is low and this could be radically improved. This would however be dependent upon realistic delivery methods being chosen (see below).

iii) Management

5.242 An increased emphasis needs to be placed upon environmental improvements throughout the centre. This will need to be considered by way of public intervention, as well as through private sector initiatives led by other owners/occupiers within the centre. As noted with other centres, the opportunity for a small-scale business improvement district may need to be considered given the similarity of many of the traders in terms of their role and function in Rusholme.

5.243 We are aware that, in fact, many of the restaurants are owned and run by a small number of businesses and this may prove extremely helpful in bringing some of the key traders into an improved management process [6].

5.244 The Council may however need to consider how to strengthen A3 policy controls, so as to limit the loss of other retail uses to this growing sector and to allow for the opportunity to diversify occupation accordingly. These issues are considered in some detail in section 4 [7].

5.245 Consideration will be needed to be given by Manchester City Council as to whether there are opportunities to improve and increase the range of public service facilities in the area. This could perhaps be achieved through a consolidated facility, i.e. a 'one stop shop' which delivers joint services, perhaps linked to a major intervention in Rusholme to bring forward appropriate sites simultaneously, as part of a single project.

5.246 Future decisions about the management and development of Rusholme should have regard to its relationship with the nearby Kingsway / Slade Lane and Dickenson Road / Anson Road local centres. These centres are identified above (section 4) as falling some way short in fulfilling their designated role, and potentially benefiting from consolidation. Any strategy for action in Rusholme should seek to support this. Equally, Claremont Road local centre has been identified as similarly failing, and removal of local centre status is suggested, in conjunction with designation of a new local centre as part of the Maine Road stadium redevelopment. Again, the strategy for Rusholme should seek to support this [1, 6].

iv) Centre Boundary

5.247 There is a requirement for a detailed review of the district centre's boundary, so as to reflect more recent developments to the north and to include other appropriate district centre uses, including parking to the rear of buildings [3]. If any major intervention were to come forward then the boundary may need to be reviewed further at a later date.

v) Land Assembly

5.248 Land assembly will be required if major intervention is to come forward. This might be complex and potentially time consuming, but may be essential if further centre improvements are to be delivered. In the early stages of any project, this may involve public funding, as a key part of a catalyst for change.

vi) Key Agencies

5.249 The main agencies required to achieve a radical improvement to Rusholme would be the City Council, especially as potentially a high level of public funding will be needed. Developers / retailers may be more interested in coming forward if credible proposals are drawn up and clarity can be given as to how land assembly issues will be addressed.

5.250 There is also a need to consider bringing forward a centre management approach involving key landlords and businesses, but with an emphasis on seeking to diversify the existing business-based rather than placing reliance on the evening economy. Improving the quality of the environment will need active cooperation of businesses and the Council [6].

vii) Immediate Priority

5.251 There are no immediate, obvious development opportunities that can readily be brought forward, although the limited opportunities outlined above should be treated as a priority. Instead, early action should be focused on bringing forward appropriate management and improvement strategies and initiatives, the latter concentrating on the streetscape and environment, in particular shop frontages, as well as controlling A3 uses robustly [7]. At the same time greater diversification of trade should be encouraged with existing businesses to expand the retail diversity in the centre. Rusholme, through Fallowfield and including Withington, is identified (section 4) as falling within a "development priority area" in the central-southern part of the city [2]. It is therefore recognised amongst all Manchester's district centres by this study as representing a particular priority for action, and recommended that action be coordinated carefully with that elsewhere in the area.

5.252 Moreover, Rusholme is classified (section 4) as a "minor district centre" within the suggested hierarchy of centres [1]. As such, it sits alongside some of Manchester's worst performing centres, and the aim should be to elevate it to "district centre status". This further underlines the view that it should be treated as a priority for action.

14. Sport City Action Plan

Key Issues

5.253 In retail terms, Sport City operates as a strong district centre. The proportion of shoppers carrying out main food shopping is extremely high and, whilst by its very nature the centre has no individual comparison outlets, the range of non food goods on offer is extensive. Shopper satisfaction is high, with over three-quarters of those using the centre finding nothing or very little to dislike about it. In terms of its commercial viability, although visitation rates are comparatively low, and dwell time is well below average, shopper spend is exceptionally high. All our observations suggest that this is a strongly performing retail centre. This is reflected in its designation as a "major district centre" within the hierarchy suggested above (section 4) [1].

5.254 This notwithstanding, its role as a district centre is compromised by a lack of choice particularly in terms of the service offer. A range of services is available in store, including health advice, photo processing, an opticians, a nail bar, and a chemist. However others, which might normally be associated with meeting the day to day needs of the local population, such as a hairdresser, Post Office, and financial services are absent. Similarly, there is little choice in terms of catering; this is restricted to McDonalds or the Asda café and prepared food counters. The evening economy, with the exception of food shopping, is poorly developed, and there are no public service facilities.

5.255 A further important issue is that the dominant food shopping function of the centre is reflected in an equally strong dominance of the private motorcar in the modal split. The proportion of shoppers arriving by private car is more than double the average amongst all Manchester's district centres whilst rates of arrival by public transport and on foot are extremely low. The centre achieved a very low rating amongst users in terms of its accessibility by public transport. The dominance of the private car is also reflected in the centre's comparatively dispersed catchment area.

5.256 The relationship between Sport City and Beswick Local Centre (formally Beswick District Centre) is also a matter of concern. There is a concentration of public services and community facilities at Beswick, including for example a youth and community centre, a housing office, Police Station, social services, a library, Post Office, Citizens Advice Bureau and "Step Ahead" (a New Deal office). However, the quality and condition of the retail offer at Beswick is extremely poor, as is the overall quality of the built environment. Similarly, the quality of Beswick's Grey Mare Lane Market is poor, both in terms of the environment and choice of stalls.

5.257 It is difficult to see how this can be reversed in the face of overwhelming retail competition a short distance up the road at Sport City. The pubic service needs of local people are therefore being met within an area blighted by marked retail decline, and physically divorced from the anchor retail offer.

5.258 In retail terms, Sport City is a strong and attractive centre. Users rate the shopping environment and quality very highly and do not perceive the lack of choice as a particular problem. It is safe and secure, and readily accessible to those arriving by car. However, the service provision and availability of wider community facilities is very poor and this restricts its ability to perform a fully rounded district centre role. The policy aspirations of the alterations to the Manchester UDP including establishing a mixed use development including A1, A2 and A3, residential, and community facilities here, creating a vibrant district centre and high street along Ashton New Road. Notwithstanding the undoubted success and popularity of Sport City as a retail destination, these wider aspirations have not been met.

Identifiable Solutions

i) Development

5.259 Within the main body of the centre, and with Asda now in situ, with a controlling position and dominant trading performance it is difficult to see how further retail and service units could be successfully accommodated and integrated. The economic assessment prepared by Nathaniel Lichfield & Partners on behalf of Amec Developments Limited in support of the "East Manchester District Centre" anticipates a scheme comprising a large food and non food retail store (built out as Asda Walmart) but also a market hall, small unit shops, and a café. The proposed site plan illustrates these uses at the south eastern corner of the site between the Ashton canal and Ashton New Road.

5.260 The site plan proposed to create a link between the new district centre and existing commercial and retail uses immediately to the east in Clayton, and also to create a meeting place and establish a "sense of place" for the new district centre. This aspiration has not been realised. Equally, the economic assessment points to the possible problems of a monopoly situation being created, leading to over pricing, which the new district centre would help to address. However, the situation that has evolved is one of a local monopoly, albeit one that does not appear to be to the detriment of consumers in retail terms.

5.261 In this context, it is necessary to look to adjoining land in considering how Sport City could be further developed to fulfil a more balanced district centre role. The sites to consider in this regard include land between the stadium and Alan Turing Way which is reserved for mixed use development following the Commonwealth Games (the "collar site"), and the generally poor quality brownfield land to the south of Ashton New Road between Alan Turing Way and the canal.

5.262 Development options here would include commercial leisure facilities, and unit shops and services with residential uses above, in conjunction with the consolidation and relocation of community facilities from Beswick.

5.263 Importantly, the design of any such mixed use development, its layout, and the orientation and positioning of units must be carefully planned so as to create a strong street frontage, and in particular ensuring that the development does not "turn its back" on the highway, as is the case with the Asda unit. Furthermore, the scale, function and format of the retail element of any development proposal here should be consistent with and complimentary to Sport City's role as a district centre. The objective should be to create a more rounded offer here, based on mixed use development principles, that should not be to the detriment of other defined centres in the area including for example Newton Heath, Openshaw, Gorton and Longsight.

ii) Environmental [5]

5.264 Whilst the pedestrian environment within the existing district centre is adequate, pedestrian linkages within and access to the site are comparatively poor and improvements would assist in increasing the proportion of walk-in trade to the centre.

iii) Management

5.265 If major development opportunities on either the collar site or land south of Ashton New Road come forward, it will be important to ensure that the significant opportunity for a wider package of benefits associated with any scheme should be realised. Efforts should be made to improve the accessibility of the site via pubic transport, both through better integration of bus stops with the district centre, and advertising and promotion of bus services in the Asda store itself. Similar considerations will apply when the tram line is built.

5.266 The more comprehensive development options outlined above may require a multi agency partnership approach [6].

iv) Centre Boundary

5.267 The centre boundary may need to be reviewed in the context of the viability and prospect of delivery of the development opportunities on the collar site and land south of Ashton Road [3]. Without this development in place, a much tighter centre boundary is appropriate, defined by Alan Turing Way, Ashton New Road and the Ashton canal.

v) Land Assembly

5.268 Public and private ownerships would be involved in the development opportunities identified above.

vi) Key Agencies

5.269 Manchester City Council and NEM will clearly have a pivotal role in realising the full potential of Sport City as a district centre. Equally, the involvement of Asda Walmart as principal occupier, as well as potential future occupiers of a wider scheme, will be important. An appropriate development partner should be identified. Finally, given the importance of increased public transport uses in accessing the district centre, GMPTE should play a central role [6].

vii) Immediate Priority

5.270 A need assessment of the requirement for further retail and service facilities in the east Manchester area, and having particular regard to the future role of Beswick, should be undertaken. Seeking to integrate successfully the provision of a wider range of facilities with the existing offer will be extremely challenging, but is important in establishing Sport City as a fully rounded district centre.

15. WITHINGTON ACTION PLAN

Key Issues

5.271 Withington has evolved to become a more service / leisure based centre, together with performing a high frequency 'top up' role for convenience retailing. Notably, although there is foodstore in the centre, this is very poorly used for main food shopping trips, and mainly serves a top up function.

5.272 The centre is small and serves a very concentrated local area compared to many of the other district centres across the city. As a result, customer dwell times are often shorter, and this is reflected in a lower level of spending on retail goods compared to other centres (approximately 1/3 of the centre average). The centre's future commercial viability as a strong A1 retail destination is therefore less certain, and policies could allow further changes of use, especially to service uses, which is a trend already occurring in the centre.

5.273 Particular concerns of the centre's users are safety and security and the overall environment which Withington offers. The perception of users of the centre suggests that the centre has decreased in quality in recent years.

Identifiable Solutions

i) Development

5.274 The constrained nature of the centre means that there are very few obvious new development opportunities which could improve its standing. The off pitch nature of the Somerfield store does not assist the centre in becoming a main food retailing destination and it would require a radical change to the built environment around it to provide the focus, or to create an opportunity which would lead to a strong quantitative and qualitative improvement in food retailing.

ii) Environmental [5]

5.275 Environmental initiatives provide more obvious opportunities to focus on improving the centre, particularly from a pedestrian safety perspective and a 'quality of streetscape' point of view. However, any such changes can be only limited in nature given the narrow width of both the road and pavements throughout most of the centre. However, the widening of the pavements/open space near the library could be exploited to facilitate better quality environmental improvements and landscaping.

iii) Management

5.276 We would anticipate that it may be appropriate to allow further expansion of the non retail offer (A3 uses). This could help to sustain the vitality and viability of the centre in the future and it would benefit the centre by diversifying its offer, and extending trading hours/activities through the day and into the evening [6]. This evolutionary approach would offer Withington specific changes, even if no radical improvements to its food retailing position can be found. It should, however, be noted that Withington lies in the same transport corridor as Fallowfield and many residents take advantage of the main food shopping at this alternative location.

5.277 Although the scope to involve occupiers in some form of business improvement district initiative may be limited, the possibility of this approach should at least be considered. The introduction of CCTV throughout the centre may also be an important initiative, and a safety feature that we sense shoppers/visitors would welcome.

iv) Centre Boundary

5.278 There is some limited need to consider redrawing the centre boundary, in order to make the district centre a more coherent at the south west and western fringes.

v) Land Assembly

5.279 Land assembly would only be required if any major intervention were considered possible as part of the process to improve the main food shopping function of the centre. This would be likely to be a complex task to undertake and would require developer/operator backing accordingly.

vi) Key Agencies

5.280 There is a greater need to focus on management arrangements and environmental improvements for the centre in the future. To facilitate this would require cooperation between the Council, occupiers and the Police [6]. The future role of the Somerfield store should also be discussed further with the operator to investigate how they can be assisted to strengthen their trading position, or possibly to seek alternative redevelopment proposals.

vii) Immediate Priority

5.281 There is a pressing need to reconsider the ability of Withington to provide a main food shopping location. Discussions need to be held with Somerfield, focusing on ways to improve their trading position and whether any major intervention is needed to achieve this. The viability of achieving any major changes without having to consider an alternative food store location may be doubtful. As such a more detailed quantitative need analysis should be undertaken for this part of the city to determine if current main food facilities are sufficient (i.e. Sainsbury at Fallowfield, Safeway Chorlton, Tesco East Didsbury etc).

5.282 In this context, Withington, through Fallowfield and including Rusholme, is identified (section 4) as falling within a "development priority area" in the central-southern part of the city [2]. It is therefore recognised amongst all Manchester's district centres by this study as representing a particular priority for action, and recommended that action be coordinated carefully with that elsewhere in the area. Moreover, Withington is classified (section 4) as a "minor district centre" within the suggested hierarchy of centres [1]. As such, it sits alongside some of Manchester's worst performing centres, and the aim should be to elevate it to "district centre status". This further underlines the view that it should be treated as a priority for action.

16. WYTHENSHAWE ACTION PLAN

Key Issues

5.283 Wythenshawe's retail environment is distinctly different from many of the district centres across the city, particularly more traditional destinations, as it is a purpose built centre combining significant amounts of retail development with public service facilities. It also acts as a key transport 'node' point for public bus services in the area. Although Wythenshawe is a strong and large district centre, it does exhibit from some weaknesses. In particular, the quality of main food shopping in the centre is very poor as reflected by a lack of frequency of visits for such a purpose.

5.284 There is also a lack of diversity in outlets catering for the evening economy and the centre is very much seen as a day time environment, although this is an inevitable result of the retail area being closed off during the evening for security purposes.

5.285 The quality of the environment around the centre is disjointed with some areas having been improved whilst others (notably the multi-storey car park) generally having a very poor quality environment for pedestrian use and safety.

5.286 There is a significant value associated with the centre from a retail occupation and investment point of view. This may make any potential reconfiguration of the centre a more complex process to implement and the ownership structure means that any large scale proposals will inevitably involve a number of parties.

5.287 The centre will be a nodal point on the new tram extension in the future, and this could significantly boost accessibility to the centre, with benefits for traders if they can attract further shoppers.

Identifiable Solutions

i) Development

5.288 The long leaseholder of the main retail centre (St Modwen) may wish to consider working with Manchester City Council on continuing to improve Wythenshawe district centre. The centre has certain opportunities which need to be exploited. In the first instance, it is clearly necessary to consider the introduction of a high quality main food shopping outlet [8]. This may require the reconfiguration of the existing built development and car parking, but potentially a new store would be of significant benefit as an anchor to the centre in the future.

5.289 The second element is to continue to improve the environment of the centre overall so as to enhance the perception of public safety and the quality overall of the pedestrian/public realm areas.

5.290 A further challenge is whether there can be reconfiguration associated with the introduction of the tram route and, in particular, where an associated further retail development might then come forward to the east of Rowlands Way.

5.291 In effect, all the above could be considered by way of a revised masterplan for the centre, that could then be considered by St Modwens/MCC as a way of tackling the weaknesses of the centre overall. In this context, we recommend (section 4) that specific policy support should be given to encourage development at this location [4].

ii) Environmental [5]

5.292 We have touched upon the environmental issues above as these potentially link to the reconfiguration of the centre in the future. Certainly an overall strategy for the public realm is required, and in particular this needs to show how linkages can be developed fully across the centre, including all of the public service areas. The present centre is somewhat inward looking and is surrounded by roads on all sides. The current poor quality and quantity of the pedestrian links to the residential areas is something that needs to be considered further.

iii) Management

5.293 Given the nature of Wythenshawe centre, and the fact that it is controlled by a single developer, there is clearly an opportunity to ensure that future management continues to be well structured and coordinated [6]. This should give Wythenshawe an advantage compared to other district centres in bringing forward continued long term management in a coordinated manner.

iv) Centre Boundary

5.294 The centre boundary is well defined at the moment. However, if there are opportunities to expand across Rowlands Way and incorporate existing facilities, then the boundary may need to be changed eastwards accordingly.

v) Land Assembly

5.295 It is anticipated that very little land assembly would be required to effect any changes to Wythenshawe centre, given the less complicated leasehold/freehold structure currently in place. However, occupational interests may be required to be bought in, if further reconfiguration of the centre is to be brought forward in the future.

vi) Key Agencies

5.296 It is evident that the key agencies involved with Wythenshawe will undoubtedly be St Modwen, Manchester City Council and the local partnership (Wythenshawe Partnership). These parties need to work together so as to help bring forward future improvements to the centre overall [6].

vii) Immediate Priority

5.297 Although we believe wholesale reconfiguration of the centre may be problematic and potentially costly, we believe it is vital that a strong main food retail outlet is realised, for the benefit of the centre. This may well be a catalyst to further change to the configuration of the centre, to improve its overall retail offer and to assist on major public realm improvements. We anticipate that the initial ‘vehicle’ for looking at this would be a masterplan and this is likely to be led by the Council in conjunction with St Modwen as the current long leaseholders of the centre.

5.298 In this context, Wythenshawe, alongside Northenden, is identified (section 4) as falling within a "development priority area" in the southern part of the city [2]. It is therefore recognised amongst all Manchester's district centres by this study as representing a particular priority for action, and recommended that action be coordinated carefully with that elsewhere in the area.

6. CENTRES AND SUSTAINABLE COMMUNITIES

6.1 Central to the policy approaches set out in section 4, and the action plans set out in section 5, is the overriding aim of creating centres that in turn contribute to creating sustainable neighbourhoods and communities. For example, in policy terms, a hierarchy constructed on the basis of social inclusion and retail provision is proposed as a framework within which progress towards this aim can be measured. The concept of "development priority areas" is introduced as a mechanism to be used in identifying where priorities lie within the city as a whole, particular development needs and opportunities are set out, and the importance of environmental improvements underlined. An innovative management structure is also suggested to ensure a coordinated response is provided. These broad policy approaches are then carried forward into the detailed centre specific action plans presented in section 5.

6.2 If the success of these policy responses is to be measured, an appropriate monitoring system put in place, and the Council's future approach to centres fully informed, it is important that the conceptual framework underpinning our analysis is made explicit. Such an explanation is provided here. At the outset, we deal with what is meant by "sustainable communities" and related terms, before going on to describe how our analysis incorporated key elements of this concept to arrive at our policy recommendations and the hierarchy, which provides the structure within which the current and future performance of the centres should be measured. Finally, we comment on what this means for centres on the ground by providing an evaluative framework within which a centre's status within the hierarchy can be assessed.

SUSTAINABLE COMMUNITIES

6.3 In 2003, the ODPM published a programme of action to tackle pressing problems in communities across England ("Sustainable Communities: Building for the Future"). Whilst the key focus of the programme is to address housing provision, quality and affordability, it recognises that community requirements go well beyond housing alone, and that the full range of community needs must be met.

6.4 The concept of sustainable development rests at the heart of the Government's vision of sustainable communities. The programme defines this as ensuring that the ways in which communities develop respect the needs of future generations, as well as succeeding now. Importantly, it recognises that in addition to the environmental dimension of sustainable development, there are also economic and social aspects. These are often overlooked when considering what "sustainable development" actually means.

6.5 Taking each of these components in turn, it is therefore implicit that sustainable communities must play a role in protecting the environment and ensuring the prudent use of natural resources. This might include, for example preserving and enhancing the urban environment, and promoting patterns of development that encourage efficient use of fossil fuels. They should also play a role in creating a setting within which people can share in higher standards of living, and provide the infrastructure to support that. Finally, they should play a role in encouraging social progress whereby the needs of all members of the community are recognised, everyone is treated fairly, and the benefits of growth are enjoyed by all.

6.6 This final dimension introduces the further concept of social exclusion. The programme addresses this with the comment that:

"Communities will be sustainable only if they are fully inclusive and basic minimum standards of public services are delivered. This is true everywhere, but especially so in the most deprived neighbourhoods and for the most vulnerable groups in society."

6.7 In this context, sustainable communities should operate to narrow the gap between deprived and more affluent communities. The programme highlights that one important aspect of this will be to ensure that all communities benefit from effective public services, but the same should apply equally to private services, shops, and other facilities needed on a day to day basis to secure a decent standard of living. Again, implicit in the programme is ensuring equality of access to these facilities according to economic status. Two comments should be made in this regard.

6.8 Firstly, communities characterised by poor access to shops, services and other facilities are exclusive both to those currently living there, and those who might otherwise want to live there – a barrier to new entrants is created. Secondly, access should not be measured solely on the basis of economic status. Social inclusion implies that the needs of all members of the community are met, and that barriers are eliminated not only in terms of affluence, but also in terms of (for example) age, sex, health and ethnicity.

6.9 Finally, the programme refers to discussions in a sub-group of the Central Local Partnership between the LGA and Central Government on the issue of sustainable communities. In seeking to understand what defines a "sustainable community", twelve key requirements were identified through these discussions:

i. A flourishing local economy to provide jobs and wealth

ii. Strong leadership to respond positively to change

iii. Effective engagement and participation by local people, groups and businesses, especially in the planning, design and long term stewardship of their community, and an active voluntary and community sector

iv. A safe and healthy local environment with well-designed public and green space

v. Sufficient size, scale and density, and the right layout to support basic amenities in the neighbourhood and minimise use of resources (including land)

vi. Good public transport and other transport infrastructure both within the community and linking it to urban, rural and regional centres

vii. Buildings - both individually and collectively - that can meet different needs over time, and that minimise the use of resources

viii. A well-integrated mix of decent homes of different types and tenures to support a range of household sizes, ages and incomes

ix. Good quality local public services, including education and training opportunities, health care and community facilities, especially for leisure

x. A diverse, vibrant and creative local culture, encouraging pride in the community and cohesion within it

xi. A "sense of place"

xii. The right links with the wider regional, national and international community

6.10 In summary, therefore, there are three elements to the concept of sustainable communities. First, there is sustainability – sustainable communities are characterised by sustainable development. The role of centres within this includes acting as a focal point for activity, promoting the efficient use of land and encouraging multi-purpose trips to minimise fossil fuel consumption. Development within centres can support and act as a catalyst for the wider enhancement of the urban environment, and provide the infrastructure for growth.

6.11 Second, there is "community" – sustainable communities are socially inclusive. The role of centres within this is to accommodate the shops, services and other facilities required to ensure that all members of the community can secure a decent standard of living. Accessibility to these facilities is a crucial element of this – centres, often located on major transport routes or nodes and embedded within the community should in theory be well placed in this regard. In considering the extent to which centres support sustainable communities, it is therefore necessary to examine the range, type and quality of facilities they provide, and the extent to which they are accessible to people by a variety of means of transport. A corollary of this is that if centres are accessible, or can be made so, then they should represent a preferred location for joint service delivery.

6.12 A further important dimension of this inclusiveness is "time". Societal shifts have influenced changes in both the nature of shops and services required by people, and the time of day they need to access them. This is particularly important with regard to the evening economy. In terms of retail, and especially convenience shopping, many people rely on shops in centres remaining open late in order to meet their day-to-day needs. In terms of services, and again in line with the sustainability agenda, people should wherever possible have local access to places to eat, drink and be entertained in centres; these activities should not just be restricted to those with private transport. Sustainable communities are socially inclusive throughout the day.

6.13 Third, there is a series of "requirements" that characterise sustainable communities. A number of these are particularly relevant to the role of centres. For example, to underpin a sustainable community, a centre should act as a focal point for the local economy to provide jobs and create wealth (requirement (i) in the list above). It should present a well designed, safe and healthy environment (iv), support basic amenities (v) and good quality local public services (ix), and encourage good public transport (vi). By promoting the engagement and participation of the local community and encouraging social inclusion it should foster community pride and encourage a diverse, vibrant and creative local culture (iii and x). Together, these factors can help to generate a sense of place (xi).

6.14 As discussed above, it should be remembered that the key focus of the sustainable communities programme is housing, and the centres side of the equation should be understood alongside and in the context of the residential. This is particularly important in locations of Housing Area Renewal (HAR), which must be supported by adequate centres to create a sustainable community. For example, the HAR programme around Harpurhey will only achieve optimum success in repopulating the area – the main thrust of the regeneration strategy here – if it is supported by a district centre providing the quality and range of shops and services required by people to meet their day-to-day needs. As discussed above, the St Modwen scheme should provide this.

6.15 Similar improvements will need to be made in East Manchester, which includes some of the city's weaker centres, to support the planned transformation of this area and its population levels and profile. Elsewhere, the relationship between HAR in the Maine Road area, and the proposals for the football stadium itself, should be considered in the context of their relationship with Hulme (a popular "major district centre") and Rusholme (a "minor district centre"), and improvements to the latter are important in supporting the sustainable community principle here. Equally, the sub-standard local centre at Claremont Road contributes little to meeting the immediate day-to-day needs of local people, and consideration should be given to upgrading local shopping facilities, possibly as part of the football stadium redevelopment.

6.16 Centres should, therefore, be recognised as being at the heart of wider sustainable communities, and effective centres are of fundamental importance to their development. Sustainable communities are resilient, self-supporting and adaptable – in the words of the programme they are, "places where people want to live and will continue to want to live". The broad policy approaches for centres that we consider necessary in helping to achieve this are reviewed below to highlight their interaction with the sustainable communities agenda, and the means by which we assessed the extent to which Manchester's district centres measure up to this concept are highlighted.

POLICIES AND HIERARCHY

6.17 In section 4, we outlined eight broad policy approaches, that deal with a range of issues, including:

1. The new centre hierarchy
2. Development priority areas
3. Centre boundaries
4. Development needs and opportunities
5. Environmental improvements
6. Management initiatives
7. Hot food take-aways and A3 uses
8. New convenience shopping

6.18 The ways in which these policy approaches support the sustainable communities agenda is set out in the table below. As our work in formulating a policy response to the issues faced by Manchester's centres progressed, we had constant regard to the importance of ensuring that these policies were consistent with the overarching aim of promoting sustainable communities. Accordingly, during the course of the study the policy approaches were reviewed and refined to ensure that they would achieve this objective, and the outcome of this iterative process is reflected in the contents of the table.

6.19 The first policy, dealing with a review of the centre hierarchy is of particular relevance to the issue of sustainable communities, and is discussed in some detail below. The status of each centre within the hierarchy reflects in part the extent to which it contributes to supporting that concept. Understanding the way in which the hierarchy was constructed is therefore of fundamental importance in understanding how centre performance can be assessed and progress monitored.

Contribution of Policy Approaches to Creating Sustainable Communities			
Policy	Sustainability	Social Inclusion	Other Requirements
1 Centre hierarchy	See detailed discussion in main text		
2 Development priority areas	Seeks to direct development that generates a substantial number of trips in sustainable locations, and to consolidate the existing focus of activity to make most efficient use of land.	Identifies where priorities lie within the overall network of centres, including those centres that are currently performing a less than adequate role in meeting the needs of the local community.	Consistent with meeting requirements (i), (v), (vi), (ix), (xi).
3 Centre boundaries	Seeks to direct development that generates a substantial number of trips in sustainable locations, and to consolidate the existing focus of activity to make most efficient use of land.	Defines the heart of the community, and the space within which the shops, services and other facilities needed to secure a decent standard of living should be located.	Consistent with meeting requirements (v), (ix), (x), (xi).
4 Development needs & opportunities	Highlights locations and ways in which the urban environment can be sustained and enhanced, seeks to identify opportunities for investment and growth.	Highlights those centres within which major intervention is required to meet the needs of local people, and those in which more minor initiatives would be appropriate.	Consistent with meeting requirements (i), (iv), (v), (vii), (ix), (xi).

5 Environmental improvements	Seeks to ensure that the urban environment is sustained and enhanced.	Identifies measures to be taken in ensuring that centres are safe, welcoming and accessible to all.	Consistent with meeting requirements (iv), (xi).
6 Management initiatives	Provides the mechanism by which a best practice approach to sustainability can be applied citywide, and maximum efficiencies achieved. Seeks to focus interest and activity within centres, making them safe and clean. Seeks to generate new funding streams to promote growth and self-sufficiency.	Provides a single body to ensure an integrated response at the local level, taking on board the needs of all members of the community. Supports involvement and provides a voice for local people and other stakeholders to influence the development of their area. Offers the opportunity for re-branding.	Consistent with meeting requirements (i), (ii), (iii), (iv), (v), (vi), (vii), (ix), (x), (xi), (xii).
7 Take-aways & A3	Concerned with ensuring that the environmental effects of an important centre use can be managed effectively.	Moderates the extent to which centres are able to provide a wide range of services and a higher standard of living, whilst ensuring that certain groups are not disadvantaged or alienated.	Consistent with meeting requirements (i), (iv).
8 New convenience shopping	Highlights possible locations for development that would potentially foster more sustainable patterns of shopping by reducing the need to	Access to adequate food shopping is a fundamental component of social inclusion; seeks to highlight areas of the city that may be	Consistent with meeting requirements (i), (v).

	travel, and support a higher standard of living.	lacking in this regard.	

6.20 In assessing the hierarchy and the extent to which Manchester's centres currently contribute to creating sustainable communities, we examined two key aspects, namely retail provision, and aspects of social inclusion. This reflects two key principles. Firstly it recognises that, fundamentally, the strength of centres is founded on their retail offer. Secondly, it recognises that centres must perform a wider role in meeting the requirements of all members of the community.

6.21 In section 5, we discussed how the comprehensive research underpinning the Stage 1 work was summarised into a proforma for each centre containing analysis of over fifty variables. A range of key variables was then selected from this to prepare indices of retail and social inclusion value. For the retail side, these included:

- The number of convenience outlets, and the number of comparison outlets – as discussed, the strength of centres is founded on their retail offer, and by including these variables we attach weight to the extent of that offer.

- The presence of superstores, supermarkets, and deep discounters – an adequate food retail provision is important in anchoring centres, and meeting the day to day needs of local people.

- Multiple representation, shopping environment, range and quality – it is important to assess the quality as well as the quantity of provision, and we included an assessment of the proportion of units occupied by multiple retailers, and the views of people on a range of shopping issues, to address this.

- Viability – the strength of a centre can also be measured with reference to headline key performance indicators; we included vacancy rates, spending levels and average dwell time in this regard.

6.22 Turning to social exclusion, the variables we examined in constructing the index included:

- The number of public service uses, and the number of private service uses – it is important that centres provide a range of facilities to meet the wider needs of the local population, and by including these variables we attach weight to the extent of that provision.

- Strength of attraction – the quality of the service provision is assessed by looking at visitation rates, the proportion of private services operated by multiples, and the views of people on the services available to them.

- Accessibility – quantity and quality of provision is less relevant if it is not also accessible to local people. For this reason, we included measures of public transport, parking and pedestrian access, but also safety and the extent to which the centres serve all sections of the community.

- Levels of evening patronage – the extent to which centres are used in the evening is indicative of the degree to which they meet the full range of needs of the communities they serve.

6.23 By focusing on the twin components of retail provision and social inclusion, our approach makes no explicit reference to the sustainable development component of the sustainable communities concept. This is not considered to be a problem for two reasons. Firstly, we have proceeded on the assumption that centres will, per se, tend to represent sustainable locations in any event, and the tone our policy recommendations seeks to reinforce this. Secondly, the issue is dealt with implicitly in any event through a number of the variables included as part of the assessment of retail and social inclusion, such as the measures of viability and accessibility.

6.24 The Stage 1 analysis illustrates the outcome of this exercise by locating each centre within a simple two-dimensional framework. The retail index is plotted along the Y axis, and the social inclusion index along the X axis – the results for Harpurhey are illustrated below as an example. Our assignment of each centre into a three tier hierarchy (“major district”, “district”, or “minor district”) is then based on where it is situated within the framework relative to other centres and groupings of centres.

6.25 However, it is important to note that this process has been moderated by our own qualitative assessment and knowledge of each centre. The indices are not followed slavishly in developing the hierarchy, as it is not considered realistic to base this purely on the reduction of each centre to a pair of coordinates.

RETAIL			
Improving / Strong			
Stable		X	
Declining / Poor			
	Poor	Average	Good
		INCLUSION	

In RETAIL terms, Harpurhey is a stable centre. In this respect it has a comparable rating to Newton Heath.

In INCLUSION terms, Harpurhey is an average centre. In this respect it has a comparable rating to Withington

EVALUATIVE FRAMEWORK

6.26 This grid conceptualises the current status of Manchester's district centres in two dimensions. However, moving forward, it is important to introduce a third dimension – time. Through implementing the policy initiatives and action plans set out in sections 4 and 5, the goal is to shift the centres towards the top right hand corner of the grid. As discussed above (section 4), it is neither desirable nor realistic to aspire to every district centre becoming "major". However, Manchester's least effective ("minor") district centres are located at the bottom left hand corner of the grid, and it is important to focus attention on them so that they may be upgraded to the "district centre" tier. Equally, through time, it will be important to reassess the standard used here to define this higher classification, i.e. what it means to be a "district centre", and again seek to move this forward.

6.27 The extent to which this has been achieved should be measured using the methodology and variables outlined above, overlain again with a qualitative review of each centre. The baseline against which such an assessment should be made is summarised in the table below, which sets out the typical profile of centres on each tier of our suggested hierarchy. However, it is important to note that there is no “magic formula” for a successful centre, and also that there is significant variation between the characteristics of individual centres on each tier. The table should therefore be viewed as a guideline to the evaluation and monitoring of individual centres, not a checklist.

Centre Hierarchy – Evaluative Framework			
	Major District Centre	District Centre	Minor District Centre
Retail Variables			
Number of outlets	A very good range of convenience outlets (typically about 15) and comparison outlets (typically about 35).	A good range of convenience outlets (typically about a dozen) and comparison outlets (typically about 20).	A more limited range of convenience outlets (typically fewer than 10) and comparison outlets (typically about 15).
Supermarkets & superstores	More likely to have a superstore than centres on other tiers. Anchored by a superstore or supermarket, may also offer a discount supermarket.	Anchored by a superstore or supermarket. More likely to offer a discount supermarket than centres on other tiers.	Anchored by a superstore or supermarket, but may only offer a discount supermarket.
Quality	High proportion of retail multiples (typically almost half). Shopping environment rated highly (4 out of 5). Shopping range and quality rated highly (3.7 out of 5).	High proportion of retail multiples (typically almost half). Shopping environment rated moderately (3.5 out of 5). Shopping range and quality rated moderately (3.4 out of 5).	Low proportion of retail multiples (typically about 10%). Shopping environment rated moderately (3.3 out of 5). Shopping range and quality rated moderately (3.2 out of 5).
Vitality	Vacancy rates low (typically about 9%), and average basket size high	Vacancy rates high (typically about 14%), and average basket size	Vacancy rates very high (typically about 18%), and average basket

	(about £25). Dwell time low – typically about an hour.	moderate (about £20). Dwell time low – typically about an hour.	size low (about £17). Dwell time high – typically approaching one and a half hours.
Social Inclusion Variables			
Number of uses	A good range of private service outlets (typically over 70), but a limited range of public service uses (average about 6; however, this is strongly influenced by limited provision in Sport City and Hulme – average for other major district centres is high (about 8)).	Adequate range of private service outlets (typically about 25), and strong representation of public service uses (typically about 10).	Adequate range of private service outlets (average about 40; however, this is strongly influenced by unusually high provision in Rusholme, Fallowfield and Withington). Limited range of public service uses (typically about 4).
Strength of attraction	High proportion of service multiples (typically about 40%). Services rated highly (3.9 out of 5), but visitation rates comparatively low.	Good proportion of service multiples (typically about a fifth). Services rated highly (3.7 out of 5), and visitation rates comparatively high.	Low proportion of service multiples (typically about 10%). Services rated moderately (3.4 out of 5), and visitation rates comparatively high.
Accessibility	Physical accessibility rated highly (3.9 out of 5), perception of safety and suitability for all sections of the community also rated highly (4 out	Physical accessibility rated moderately (3.6 out of 5), perception of safety and suitability for all sections of the community	Physical accessibility rated moderately (3.6 out of 5), perception of safety and suitability for all sections of the community

	of 5).	also rated moderately (3.6 out of 5).	also rated moderately (3.3 out of 5).
Evening patronage	Good level of evening patronage.	Weak evening patronage.	Very strong evening patronage (however, strongly influenced by Rusholme and Fallowfield).

6.28 Again, it should be emphasised that this represents a framework for strategic guidance only, and in considering the status of individual centres it will always be important to consider qualitative factors and apply judgement. The "major district centres" are a good example of this. The public service provision in a number of these centres is limited – and in the case of Sport City, non-existent. Similarly, with the exception of food shopping, the evening economy in Sport City is poorly developed. However, they undoubtedly operate as higher order centres in the context of Manchester's overall local and district centre provision and, importantly, they are popular, highly rated, and well used. For this reason, where public service provision is lacking, these centres should be a preferred location for joint service delivery, and where private services to meet the day to day needs of local people are missing, they should be encouraged.

6.29 At the other end of the spectrum, the character of "minor district centres" restricts their ability to support the concept of sustainable communities. The retail offer is limited and of poor quality, public services are similarly restricted and service quality uninspiring. However, they are characterised by high visitation rates and extremely high dwell times. Indeed, average dwell times are markedly higher than for "major district centres" and "district centres". This is indicative of demand for provision frustrated by poor quality, reflected by dissatisfaction. Some of these centres – notably Rusholme and Fallowfield – are successful in performing a niche function through their evening economy, and this should be managed as a strength. However, none of the "minor district centres" are performing a fully rounded role as cornerstones of sustainable communities, and it is these centres that warrant most action and investment.

7. Summary and Conclusions

Policy Recommendations

7.1 We recommend 8 broad policy approaches to guide the evolution of Manchester's district and local centres. These include:

1. A New Centre Hierarchy – the definition of a district centre hierarchy is important for three key reasons. First, it is the means by which the places within which certain types of development are to be directed are identified. Second, by establishing tiers within that framework it is the means of describing the current status of Manchester's district centres. Third, it is the means by which the performance of centres can be monitored and the success of policy initiatives assessed. The hierarchy comprises three tiers – 'major district centres' (e.g Chorlton and Sport City), 'District Centres' (e.g. Northenden and Harpurhey), and 'minor district centres' (e.g. Gorton and Fallowfield). The strategic aim should be to elevate the 'minor district centres' to 'district centre' status, and to raise the overall standard of the 'district centre' classification.

2. Development Priority Areas – this is a policy mechanism to identify where the priorities lie within the overall network of centres in Manchester. Centres should remain the preferred location for certain types of development, including those that generate a substantial number of trips. The concept of 'development priority areas' highlights parts of the city defined by groups of centres, and the neighbourhoods they serve, that represent a priority in terms of investment and regeneration activity. Three such areas area suggested, including the Rusholme / Fallowfield / Withington area, the Wythenshawe / Northenden area, and an eastern area, broadly defined, comprising Gorton, Openshaw, and Newton Heath / Miles Platting.

3. Centre Boundaries – in spatial planning terms the definition of what is meant by a 'district centre' on the ground is of fundamental importance. It delineates the preferred location for certain types of development, and can help manage the evolution of a centre to create a more focused, vital and viable place. The definition of many of Manchester's district centres bears little relationship to the current or proposed situation there. The district centre boundaries should be reviewed and where appropriate redrawn.

4. Development needs and opportunities – to strengthen further the strategic guidance provided by the centre hierarchy and development priority area approaches, specific

policy support should be put in place to encourage and bring forward development in a number of district centres, including Openshaw, Gorton, Newton Heath, Wythenshawe and Rusholme, as well as the inner north / Oldham Road area. Coordination and prioritisation of action within these centres should be carried out in accordance with the management initiatives discussed below.

5. Environmental Improvements – the need for a programme of environmental improvements is evident across a large number of Manchester's centres. This should be recognised as a policy priority and again coordinated through the management initiatives discussed below.

6. Management Initiatives – a key concern in seeking to enhance Manchester's centres is the lack of a coordinating body to ensure an integrated, citywide response at the local level. We recommend a new approach to the management issues facing Manchester's centres comprising three distinctive strands – a District Centres Manager supported by a Senior Project Champion, a district centre regeneration company, and local development partnerships. It may be appropriate to combine these roles into a single vehicle operating along the same lines as the city centre management company, or indeed to expand the remit of the city centre management company to cover the district and local centres.

7. Hot Food Take-Aways and A3 Uses – the issues surrounding hot food take-aways and A3 uses are a matter of some concern to the City Council. The preparation of Supplementary Planning Guidance is recommended as an appropriate response to address these concerns, to be used in parallel with the effective, creative and consistent application of conditions, and establishing and working with a forum of interested parties outside the planning arena. In formulating a policy response to this particular issue it is of fundamental importance to follow an objective, balanced and even handed approach that avoids being overly prescriptive and takes a long term view. It should be subject to detailed analysis and very careful consultation.

8. New Convenience Shopping – several potential areas are identified for additional or improved convenience retailing, including the city centre, the inner north / Oldham Road area, Openshaw, Gorton, Rusholme and Wythenshawe / Northenden. Should proposals come forward for development at these (or indeed any other) locations, they should be subject to the requirement for a detailed supporting retail statement.

DISTRICT CENTRE ACTION PLANS

7.2 We have prepared an action plan for each of Manchester's district centres, presenting a vision for their future development. We briefly comment on our analysis of each centre below:

- The ability of Cheetham Hill to operate as a district centre is undermined by the quality of its retail offer, the quality of its private service offer and the quality of its urban environment. Major intervention by way of proposals to redevelop the Cheetham Hill Parade and adjoining land to include the provision of a Tesco superstore is anticipated. As this development moves forward, the immediate priority is to invest in a programme of environmental improvements elsewhere in Cheetham Hill, to ensure that the centre as a whole is able to contribute to meeting the needs of local people once the Tesco scheme is in place.
- Chorlton is performing well in many respects and is designated as a 'major district centre' within our suggested hierarchy. One important area of concern is the poor quality and function of its main food store. The immediate priority to drive Chorlton forward is therefore measures to improve the performance and attraction of this store.
- Similarly, Didsbury functions well as a district centre, and is designated as a 'major district centre' within the suggested hierarchy. The issues faced by Didsbury tend to be focused on environmental and management matters, and improvements should be pursued in this regard.
- Fallowfield is identified as representing a particular priority for action. It falls within a 'development priority area' in the central – southern part of the city, and is classified as a 'minor district centre' placing it alongside some of Manchester's worst performing centres. Immediate priorities include seeking to promote non-food retail in the centre, and managing A3 uses more effectively.
- We recommend that specific policy support should be given to encourage development in Gorton – it is a poorly performing 'minor district centre' and falls within the 'development priority area' in the western part of the city. Comprehensive redevelopment of the shopping area is a priority, driven by a master planning approach.
- The weaknesses of Harpurhey - limited comparison goods shopping, poor private service provision, poor performance of public services - should be addressed by the comprehensive redevelopment scheme for the centre currently being brought forward. In this context the immediate priority is to capitalise on this investment

further by supporting the reuse of the important public bath buildings and site by the Manchester College of Arts and Technology.

- The designation of Hulme as a 'district centre' reflects the strength of its convenience shopping attraction, its strategic location serving the southern central part of the city, and the plans and opportunities to enhance its role further. The immediate priority is to create additional critical mass by way of further non-food retail provision, and in turn the provision of further non-retail facilities, environmental improvements, and enhanced public transport accessibility.
- The status of Levenshulme as one of Manchester's largest district centres, offering a wide range of facilities and a particular niche in terms of its antique and furniture shop provision is reflected in its designation as a 'major district centre' within the suggested hierarchy. However, the vacancy rate is amongst the highest recorded citywide, and there is a need to encourage the reoccupation of these units as part of a wider reconfiguration and consolidation strategy for the centre as a whole.
- Whilst Longsight has several strengths, including the main food retail focus for the A6 corridor (Asda) and a number of public service uses, it does not fully capitalise on the opportunities these facilities present. As such, the centre would benefit from consolidation of the public service provision, and an improved treatment of Asda and the area immediately around it, to integrate it more fully with the Stockport Road frontage and the rest of Longsight.
- Newton Heath performs adequately as a district centre but improvements are required to underpin its commercial viability and support its ability to perform its designated function. It benefits from the availability of several potential development sites, which should be exploited to support its vitality and viability. We recommend that specific policy support should be given to encourage development in Newton Heath, and its location within a 'development priority area' recognises that it represents a particular priority for action.
- Similarly, Northenden is performing adequately as a district centre, although opportunities for change by way of operational development appear limited. However, Northenden, alongside Wythenshawe, falls within a 'development priority area' in the southern part of the city and therefore represents a particular priority for action. In this context, emphasis should be placed on pursuing the limited development opportunities that do exist in the centre, and on bringing forward environmental improvements.
- Of all the district centres examined, Openshaw faces perhaps the greatest challenges in terms of its retail and service offer, the quality of its shopping

environment, and its ability to maintain its function as a viable district centre. It is classified as a 'minor district centre', located within a 'development priority area', and we recommend that specific policy support should be given to encourage development here. The proposed redevelopment of the Alstom Works may provide the opportunity to revitalise the centre, although any firm proposals for this site should be subject to detailed scrutiny.

- Rusholme functions well in terms of Asian retailing and the lively evening economy, and is unique in Manchester in terms of this valuable niche role. However, to a certain extent, this is at the expense of its ability to perform a fully rounded district centre role, and on this basis it is classified as a 'minor district centre' within the suggested hierarchy of centres. It is also identified as falling within a 'development priority area' in the central – southern part of the city, and therefore recognised as representing a particular priority for action. In the context of the particular development challenges evident in Rusholme and the needs of the area we recommend that specific policy support should be given to encourage development at this location. Equally, improved centre management is an immediate priority.

- In retail terms Sport City operates as a strong district centre – the range of goods on offer is extensive, shopper satisfaction is high and it is extremely well used. This is reflected in its designation as a 'major district centre' within the hierarchy. However, the service provision and availability of wider community facilities is very poor and this restricts its ability to perform a fully rounded district centre role. The pursuit of opportunities to broaden the range of facilities available at Sport City is an immediate priority.

- Withington is classified as a 'minor district centre' , reflecting its limited retail offer, concerns over safety and security, and the overall centre environment. It is located within a 'development priority area' and as such recognised as representing a particular priority for action.

- Similarly, Wythenshawe (alongside Northenden) falls within a 'development priority area' and is therefore identified as a particular priority for action. The provision of a strong main food retail anchor is an immediate priority here, to act as a catalyst to further, much needed improvements to the centre.

The Local Centres

7.3 Whilst the main focus of the study has been on Manchester's district centres, we have also carried out a detailed review of its local centres. Whilst none of the local centres examined warrant elevation to district centre status, consideration should be given to removal of one – Claremont Road – from the hierarchy, possibly in conjunction with the designation of a new local centre as part of the Maine Road stadium redevelopment. Two further local centres situated within close proximity of one another – Kingsway / Slade Lane and Dickenson Road / Anson Road – are also, in functional terms, amongst the poorest performing in Manchester. We recommend that consolidation of these centres into a single centre should be considered.

7.4 The qualitative shortcomings evident in a range of local centres should be addressed through the broad policy approaches outlined above, in a way that will enable them to perform their role and function more effectively. For example, a number of local centres are situated within the 'development priority areas' and future decisions about the management and development of district centres within these areas should have regard to their relationship with nearby local centres, as specified in the action plans. Similarly, the definition of centre boundaries (or centre frontages) is an issue of particular importance to the local centres. A key problem faced by many local centres is that they are disjointed, fragmented, and lack definition and a clear focal point. Clearly defined boundaries supported by a policy approach to manage uses both inside and outside the centres are extremely important. Finally, the opportunity to improve convenience shopping at a local centre scale in a replacement local centre at Maine Road and a consolidated local centre in the Dickinson Road / Anson Road, Kingsway / Slade Lane area is highlighted.

SUSTAINABLE COMMUNITIES

7.5 The policy approaches and action plans have been prepared with the overriding aim of creating centres that in turn contribute to creating sustainable communities. We have identified three elements to the concept of 'sustainable communities'. First, sustainable communities are characterised by sustainable development. Second, sustainable communities are socially inclusive. Third, sustainable communities can be characterised by the extent to which they meet a series of 'requirements' covering a range of issues. Centres should be recognised as occupying a place at the heart of wider sustainable communities, and effective centres are of fundamental importance to their development.

7.6 In assessing the hierarchy of centres within Manchester, and the extent to which these centres currently contribute to creating sustainable communities, we have examined two key aspects, namely retail provision, and elements of social inclusion. This assessment has been moderated by qualitative analysis and our knowledge of each centre. We have constructed on this basis an evaluative framework within which the progress of Manchester's district centres can be monitored. Whilst it is neither desirable nor realistic to aspire to every centre becoming 'major', it is important to focus attention on the 'minor district centres' so that they may be upgraded to the 'district centre' tier. Equally, through time, it will be important to raise the standard of the 'district centre' tier.

7.7 It should be emphasised that this evaluative framework is for strategic guidance only. In considering the status of individual centres it is always important to examine qualitative factors and apply judgement.

KEY STAKEHOLDERS

7.8 Delivering the Action Plans to improve the retail and other facilities within Manchester's District and Local Centres is a long-term process. Even in relation to the individual sites in potentially attractive areas, the development process can take a number of years from inception to completion. The successful implementation and delivery of the objectives often requires a change in the role and perception of the area itself. This requires a move towards sustained investment confidence and activity to implement projects and thus to stimulate change both in the physical environment and in people's perception of the area in question. It is only once physical action and change takes place on the ground that confidence and investment interest will be stimulated. A marketing strategy may therefore be needed to promote all the centres where significant change is envisaged, to potential investors, developers, occupiers and the local community. This should be implemented through the management initiatives discussed above.

7.9 Implementation of the Action Plans is therefore likely to take place over the short, medium and long term, and will require the cooperation and commitment of a number of key parties. The roles of these parties are expected to be as follows:

PARTY	ROLE/TASK/FUNCTION
THE COUNCIL	• Marketing: The Council will be the main 'sponsor' of each Action Plan and therefore will be responsible for marketing it and individual development / investment opportunities to the private sector and to the general public.

PARTY	ROLE/TASK/FUNCTION
	• Local Planning: The Council will determine the statutory land use and infrastructure planning policies, based upon the emerging ideas from the Action Plans. The Council will also be required to review planning policies in light of the initiatives being put forward. The Council will need to consider S106 obligations with developers (where more viable schemes exist) as a means of securing infrastructure, community, environment and social benefits as part of any new development. • Compulsory Purchase Orders/Road Closure Orders: In order to ensure that appropriate sites are brought forward at the correct time, maximising the benefits to the overall implementation of the relevant Action Plan, it may be necessary for the Council to exercise its powers of Compulsory Purchase. This will be necessary to provide certainty as to the delivery process. Road Closure Orders may also be required in order to implement any transport related proposals. • Partnerships: It is envisaged that the proposals can be implemented through a process of partnership with the various stakeholders. Negotiations on partnership arrangements will be required to establish the framework for partner involvement.
District Centre Management (DCM)	• Marketing: The creation of a district centre management structure would be desirable, for overseeing and providing a strong drive to implementing any proposals. For example, were such a body created, it could be responsible for the active marketing of the relevant centre to the public and private sector investors alike. In particular, the DCM will need to market the centres to new retailers, and to the public by holding events/exhibitions in the centre. In essence the DCM will form an integral part of the delivery of the vision.
LANDOWNERS	• Partnership: There are a number of landowners with significant interests in each District Centre. In each case, it is important to identify relevant land ownerships to facilitate delivery. These parties have a major role to play, by working in partnership with the Council, who is also a major landowner in many of the centres. Potentially, the landowners will also have the opportunity to participate in enhanced land values/rents/investment

PARTY	ROLE/TASK/FUNCTION
	activity, as a result of implementing the objectives of the Action Plans.
DEVELOPERS	• Transfer of Risk/Partnership: The Council will seek to transfer an appropriate level of development risk to individual developers who will be responsible for implementing the proposals across the individual sites referred to included within the Action Plans. • Innovative Funding: Developers will be keen to capitalise on opportunities for innovative funding structures, to ensure that sites can be brought forward for comprehensive development at the earliest opportunity, or when they are most able to contribute to the successful implementation of the Action Plan proposals.

7.10 A delivery framework will need to be established between the above parties / partners. The delivery framework will need to be as flexible as possible to ensure that the Action Plans can accommodate changes in phasing and the mix of land uses and remain robust as market considerations and demand for space fluctuates. Within the Action Plans, we explained the key tasks that need to be undertaken within the short, medium and long term, but the overall strategy is one which will need to be carefully monitored, not only over an initial 3-5 year period, but also in a longer timescale, given that some projects or initiatives in Manchester may take 10 years, or even longer, to come to fruition.

7.11 Taken together, the Action Plans and the detailed proposals set out in this report will help to secure the necessary 'step change' required to improve the district and local centres' attractiveness and ability to contribute to and support sustainable communities. A positive first step for the proposed District Centre Manage would be to produce a five year outline Business Plan, in order to see clearly and agree the Council's aims and priorities, and to show how the other parties will each play a part within the delivery of the proposals.

OBJECTIVES

7.12 In Section 4, we set out our recommended policy initiatives for development, the environment and management across the city's district and local centres. These were expanded within the Action Plans in Section 5. The opportunities identified in this section provide significant scope to change the perception of and the future role and function of, many of the city's centres. However, to support the city-wide strategy, and to inform future benchmarking and monitoring, we have encapsulated the key issues and themes emerging from the study into ten objectives. These are as follows:

- **Objective 1 – Improve the Urban Quality of the District / Local Centre**

Each centre must be distinctive in terms of the mix of uses, services and facilities, but also in the quality of the environment (buildings, spaces and streetscape).

- **Objective 2 – Introduce New Uses and Facilities**

Many of the centres need to continue to provide opportunities for new non-retail services to be improved and for residential led mixed-use developments to be incorporated.

- **Objective 3 – Develop Specialist Retail**

As well as increasing the opportunity to attract mainstream retail (i.e. comparison and convenience), some centres need to expand their offer by providing opportunities for specialist retailing (ranging from Asian retailing to antiques). Local independent traders can also facilitate more specialist retailing.

- **Objective 4 – Improve Access and Connectivity**

In many centres, issues relating to car parking need to be addressed on an ongoing basis, and improvements to servicing solutions may be required so as to enhance conditions for pedestrians and shoppers.

- **Objective 5 – Improve Urban Space, Approaches and Streetscape**

New or improved public spaces, clear gateways to each centre, a strong treatment of street layout and design, and active frontages on ground floors, need to be addressed in order to improve the environment and to strengthen the identity of the centres.

- **Objective 6 – Build Civic 'Local' Pride through Partnership**

It is important to bolster the confidence in the future of each district / local centre, which together are a major part of the life of the city, and to enable partnerships to be built or strengthened at the district or local level, through coordinated action by a District Centres Manager.

- **Objective 7 – Create a Unique Physical Catalyst**

A significant element of physical change to the fabric of each centre, that can be implemented readily or at an early date, could assist in making clear the commitment of the City Council to the District/Local Centres Strategy and encourage further investment and development.

- **Objective 8 – Strengthen Centre Management**

It may be necessary to seek increased funding to support the implementation of the Action Plans. It is also strongly recommended that the suggested revised management structure be made responsible for implementing the key Action Plan initiatives. Some actions and initiatives could also be monitored more at the local level by those local partnerships or stakeholders who have a detailed understanding of the needs of the centre. Such a partnership could act as the local management board. In turn, this could enable a source of community ownership of the proposals, as discussed earlier.

- **Objective 9 – Enable Community Participation**

Encourage the local community to take ownership and pride within each district and local centre by holding public consultation events and having a strong community representation on the relevant management board. Thus, we envisage that the initiatives suggested would be driven by a partnership of community and relevant interested parties.

- **Objective 10 – Improve the Perception in the Wider Retail and Leisure Market of Key District and Local Centres**

By focusing on the above objectives, it should be possible to improve each centre's retail and leisure perception e.g. among retailers, shoppers and other non-users'. However, this can be further achieved by actively promoting the centre in the local press and / or public events within the centre.

7.13 Given the scale of the objectives, it is likely to take a number of years to realise the potential of all the district and local centres. To realise this full potential, the City Council, together with other landowners, investors, developers and other agencies in the public sector will need to work closely together to ensure that development / investment across the individual centres is delivered in a cohesive, comprehensive and above all integrated manner.

FURTHER RECOMMENDATIONS

7.14 Throughout this study, detailed advice is given and recommendations made in terms of policy approaches, action plans for each district centre, and evaluation of the extent to which Manchester's centres contribute towards supporting 'sustainable communities'. In terms of overarching recommendations we would comment as follows:

1. The policy advice and action planning should be carried forward and implemented through the UDP Review within the new development planning framework.

2. Within this process, the immediate priorities include;

   a. Management initiatives – the policy recommendations made in terms of a new approach to the management of Manchester's district and local centres are of fundamental importance to the strategy as a whole and should be pursued at the earliest opportunity.
   b. Centre boundaries – in spatial planning terms the review and redefinition of district centre boundaries and local centre boundaries / frontages is key to their future development.

   c. Development priorities – the centres representing a particular priority for action are highlighted through the new centre hierarchy, the 'development priority areas' and the specific development needs and opportunities commentary. Action in many of these centres is required immediately and every effort should be made to expedite this, for example through the Council initiating a master planning process.

   d. Hot food takeaways and A3 uses – on a day to day basis, the issues arising from these uses are a matter of some concern to the Council. The SPG lead approach to dealing with these concerns suggested here should be pursued.

3. We have identified a concentration of potential opportunities for convenience retail in east and south Manchester, *broadly defined*. A pro-active and strategic view should be taken on the scope to support further convenience retail in these parts of the city. This should be in the form of a quantitative market analysis, married to the qualitative assessment presented in this study, to pre-empt rather than respond to individual schemes that may come forward. A three-stage process is suggested, comprising analysis of the existing market, detailed assessment of the locations for future growth, and recognition of the qualitative needs of local people, within the context of wider regeneration initiatives.

4. In section 6 of this report we set out the evaluative framework within which the current status of Manchester's district centres was assessed, and the future progress of the centres can be measured. Moving forward, it will be important to use this framework to determine the extent to which Manchester's worst performing centres have improved, and overall standards have been enhanced.