

Appendix 4: Town Centre Healthcheck Assessments

Altrincham Town Centre

Description

Altrincham is a historic market town and is, by some distance, the largest centre in Trafford. It has a particularly strong service sector, which has evolved significantly in recent years as a consequence of the regenerated Altrincham Market and through attracting a range of new independent operators. Consequently, Altrincham has developed a unique offer which supports substantial footfall.

The centre is also well integrated to the wider public transport network, with Altrincham Interchange located in the east of the centre. In addition, the public realm, which has received considerable investment in recent years, is considered to be of a high standard and contributes to an attractive environment.

Status

Town Centre



Figure 1: the Con Club, located opposite the Altrincham Market



Figure 2: Altrincham Market



Figure 3: the Rackhams unit in Altrincham town centre



Figure 4: Altrincham Interchange

Table 1 Town Centre Floorspace Composition – Goad Centre Boundary

GOAD Category	Floorspace at 2007 (%)	Floorspace at 2018 (sq.m)	Floorspace at 2018 (%)	Trafford Town Centre Floorspace at 2018 (%)	Floorspace UK Average at 2018 (%)
Convenience	14.0	13,840	16.0	18.4	15.3
Comparison	36.0	23,770	27.5	26.5	34.6
Retail Services	34.2	6,980	8.1	8.1	6.9
Leisure Services		27,210	31.5	24.7	25.2
Financial and Business Services		6,020	7.0	7.1	7.6
Miscellaneous	6.1	0	0.0	0.0	0.1
Vacant	9.7	8,520	9.9	15.1	9.9
Total	100.0	86,340	100.0	100.0	100.0

Source: Composition of Town Centre derived from Nexus Planning survey of October 2018 using Experian Goad survey area; Trafford Town Centre Floorspace (cumulative figure) derived from Nexus Planning survey of October 2018; UK Average from Experian Goad Report June 2018; Figures from 2007 sourced from Trafford Retail and Leisure Study 2007 (note 1)

Table 2 Town Centre Unit Composition – Goad Centre Boundary

GOAD Category	Units at 2007 (%)	Number of Units at 2018	Units at 2018 (%)	Trafford Town Centre Units at 2018 (%)	Units UK Average at 2018 (%)
Convenience	4.1	16	4.1	6.9	9.1
Comparison	33.0	107	27.3	25.6	30.5
Retail Services	43.3	68	17.3	17.7	14.6
Leisure Services		111	28.3	24.2	24.1
Financial and Business Services		46	11.7	11.6	10.2
Miscellaneous	2.3	0	0.0	0.0	0.1
Vacant	17.3	44	11.2	14.0	11.3
TOTAL	100.0	392	100.0	100.0	100.0

Source: Composition of Town Centre derived from Nexus Planning survey of October 2018 using Experian Goad survey area; Trafford Town Centre Units (cumulative figure) derived from Nexus Planning survey of October 2018; UK Average from Experian Goad Report June 2018; Figures from 2007 sourced from Trafford Retail and Leisure Study 2007 (note 1)

Table 3 Town Centre Facilities

Type of Provision		Total
Key Anchor Units	Tesco Extra, Sainsbury's, Marks & Spencer, House of Fraser and Vue	81
Other National Retailers	Accessorize, Age UK, Argos, Barclays, Barnardo's, Betfred, British Heart Foundation, Bodycare, Boots, Caffe Nero, Cancer Research UK, Card Factory, Cex, Claire's, Clarks, Cohen's Pharmacy, Costa, Costcutter, Dawsons, Debenhams, Domino's, EE, Flannels, Frankie & Benny's, Grapevine, Greggs, H&M, Halifax, Holland & Barrett, Home Bargains, HSBC, Iceland, JD, KFC, Kwik-Fit, Ladbroke's, Lloyds, Lloyds Pharmacy, Magnet, Max Spielmann, Millets, Monsoon, Nando's, Nationwide, Natwest, Next, Oxfam Books, Paperchase, Poundland, Pure Gym, RBS, River Island, Ryman, Santander, Sharps, Skipton, Spar, Specsavers, Starbucks, Subway, Sue Ryder Care, The Carphone Warehouse, The Entertainer, The Salvation Army, The Works, Thomas Cook, Three, Tim Hortons, Timpson, Toni & Guy, Travelodge, TUI, Vodafone, Waterstones, WH Smith and Wilko	
Community Facilities	Three dental surgeries, two nurseries, two health centres, a place of worship and a tourist information centre	9

Source: Composition of Town Centre derived from Nexus Planning Survey of October 2018

Table 4 Major Retailers Present

Department Stores		Clothing	
Debenhams	1	Burton	0
House of Fraser	1	Dorothy Perkins	0
John Lewis	0	H&M	1
Marks & Spencer	1	Monsoon Accessorize	1
Mixed Goods Retailers		New Look	0
Argos	1	Next	1
Boots the Chemist	1	Primark	0
TKMaxx	0	River Island	1
W H Smith	1	Topman	0
Wilko	1	Topshop	0
Supermarkets		Other Retailers	
Sainsbury's	1	Carphone Warehouse	1
Tesco	1	Clarks	1
Waitrose	0	Clintons	0
		EE	1
		HMV	0
		O2	0
		Superdrug	0
		Vodafone	1
		Waterstones	1

Source: Composition of Town Centre derived from Nexus Planning survey of October 2018; Major retailers are the 30 operators identified by Experian Goad as being the most likely to improve the appeal of a centre

Overall Composition

- Overall there are 392 units located within the Goad centre boundary for Altrincham town centre. These account for 86,340 sq.m of commercial floorspace.
- Altrincham is the largest town centre in Trafford.
- The current vacancy rate within the Goad centre boundary is recorded as being 9.9% of total commercial floorspace and 11.2% of all units. Within the primary shopping area ('PSA') (as recommended by Nexus as part of this Study – see Appendix 8), the total vacant floorspace equates to 4,890 sq.m or 12.8% of the available commercial floorspace, and 24 units which equates to 13.4% of the units.
- Convenience and comparison uses account for 43.5% of floorspace and 31.4% of all units.
- Services uses (leisure, retail and financial and business) account for 46.6% of floorspace and 57.3% of all units.

Convenience & Comparison

The convenience and comparison goods provision in Altrincham, in respect of floorspace and number of units, is broadly in line with UK national average levels and the average figure for Trafford's four town centres. Retail operators account for 37,610 sq.m of floorspace (equivalent to 43.6% of the total stock of floorspace in the centre) and 123 units (equating to 31.4% of all units in the centre). The centre's overall Class A1 offer is evidenced by the presence of 18 of the 30 retailers identified by Experian Goad as being most likely to improve the appeal of a centre having a presence in Altrincham.

There are 107 comparison goods units in Altrincham, a figure which accounts for 27.3% of all units and a total of 23,770 sq.m of floorspace. This figure represents a decrease from the 36.0% of floorspace recorded in 2007. The comparison goods offer is anchored by Marks & Spencer and House of Fraser on George Street, and has a decent range of operators, ranging from local independents to national fashion multiples. Although the proportion of comparison goods floorspace in Altrincham is lower than the current UK national average, (possibly as a result of competition from the Trafford Centre or due to it functioning differently to the city and larger town centres in the UK), it is considered sufficient to support Altrincham's role as the principal centre in Trafford.

The convenience goods offer is underpinned by Tesco Extra on Manor Road, Sainsbury's on Lloyd Street, and the Marks & Spencer Foodhall within the M&S located on George Street. Convenience goods provision accounts for 13,840 sq.m of floorspace, equating to 16.0% of all floorspace in the centre. The 16 convenience operators are relatively diverse and include three convenience stores, three bakeries, a delicatessen, a tobacconist and an off-licence. Although the number of convenience goods operators is limited relative to other centres, accounting for just 4.1% of operators in the centre, the proportion of convenience goods floorspace is similar both to the national average figure and the average figure for Trafford's town centres.

Whilst the amount of comparison goods floorspace in the centre is lower than the national average, it is higher than the average figure across the four Trafford town centres. This is also reflective of Altrincham's stronger leisure service offer, which plays an important role in underpinning the centre. It should also be noted that House of Fraser on George Street was saved from closure in mid-2018, and 4B George Street (which was recorded as 'under alteration' at the time of our visit) has now opened as Søstrene Grene.

The centre also has 18 of the 30 major retailers that have been identified by Experian Goad as likely improving the appeal of a centre. These show an underlying strength and confidence in the centre, and despite the competition of the Trafford Centre and Manchester city centre in terms of comparison offer, Altrincham remains an attractive and viable destination.

According to therequirementlist.com website, there are a number of retailers who have a need for premises in Altrincham, including The Fragrance Shop, KFC and Aldi.

Services

Service operators (leisure, retail and financial and business) account for 225 units in Altrincham and occupy a total of 40,210 sq.m of floorspace. Leisure uses account for 57.4% of all units in the centre and 46.6% of the total stock of floorspace. As such, the level of leisure provision is both greater than the UK national average and the average for Trafford's town centres.

Leisure service operators constitute the single largest use in Altrincham, accounting for 31.5% of floorspace and 28.3% of all units in the centre. The leisure service offer is strong, but is concentrated around the mid-market food and drink offer. Leisure service operators are located throughout the centre, with a particular focus along Stamford New Road/Railway Street, and around Altrincham Market, which acts as an anchor for the leisure service offer and drives activity and footfall in the centre throughout the day and night.

Altrincham Market comprises three principal elements: Market House Altrincham (which is a permanent indoor food hall), New Market Square (food 'pods' with outdoor seating) and the outdoor covered market (which has an offer than changes from day to day). The market has been hugely successful since being revamped in 2014, and has subsequently won numerous awards (including the Observer Food Monthly Best Market Award). It is widely referenced as a case study in securing the regeneration of a town centre around a modernised market.

It is difficult to overstate the transformational effect that the market has had in Altrincham. Whilst the area around the Market Hall previously benefitted from an interesting range of independent bars (such as Pi and the Belgian Bar), the popularity of the market (and the fact that it is difficult to get served at busy times) has helped support a succession of new openings in the area.

Whilst the early beneficiaries of the market's success were generally additional food and drink operators (such as the national chain Bistrot Pierre on George Street in 2016 and the Con Club on Greenwood Street, both of which opened in 2016), recent openings have highlighted the wider benefits of the improved footfall in the centre. In the past few weeks, Søstrene Grene and the Everyman cinema have opened, which both appreciably bolster the town centre offer. Altrincham would not likely have been on the radar of such operators prior to the renewal of the market's offer.

The leisure service offer in the town centre includes hot-food takeaways, cafés, bars and wine bars, restaurants, sports and leisure centres, pubs, clubs, betting offices, a hotel, a cinema and a theatre. Although the majority of operators are independent, there are a number of national multiples with a presence in the centre, including Nando's, Pure Gym and Betfred. There may well be interest from additional national multiple leisure operators as a consequence of the popularity of the centre.

There are a total of 68 retail service units within Altrincham, which account for 6,980 sq.m of floorspace and equate to 8.1% of the total floorspace in the centre. This figure is greater than the national average, but is the same as the average figure for the four Trafford town centres. The retail service offer is diverse, with operators including hairdressers, beauty salons, tailors, opticians, travel agents, photo developers, a petrol filling station, drycleaners and a Post Office. A number of retail service national multiples have a presence in Altrincham, including Boots Opticians, Tui and Max Spielmann.

Similarly, the financial and business service offer includes a number of national multiples, such as Barclays, Halifax and RBS, alongside a number of independent operators. There are 46 financial and business service operators in Altrincham, accounting for 6,020 sq.m of floorspace, which equates to 7.0% of the total stock of commercial floorspace.

Although the number and proportion of service operators is greater than the national average, these uses (particularly leisure service operators) underpin the centre and contribute hugely to the vitality and long-term viability of Altrincham. The growth in independent leisure operators, with particular reference to Altrincham Market, has been a substantial boon to Altrincham and has ensured it remains an attractive destination at all times of the day.

Vacancies

Our survey recorded a total of 44 vacant units in Altrincham, which account for a total of 8,520 sq.m of retail floorspace and equate to 9.9% of the total stock of commercial floorspace. This figure is the same as the current UK average for vacant floorspace and is similar to the vacant floorspace recorded in 2007. We are aware that the vacancy rate has been relatively high in Altrincham for much of the past decade and the current lower vacancy rate reflects the resurgence in the town's fortunes in the past three

or four years. Furthermore vacant floorspace is substantially lower than the average for the four town centres in Trafford, which is 15.1%.

Looking at the commercial floorspace within the recommended PSA boundary, as shown at Appendix 8, the vacancy rate is recorded as 4,890 sq.m which equates to 12.8% of the total stock of commercial floorspace, and 24 units which is 13.4% of the total. The proportion of vacant units and floorspace within the PSA is therefore higher within the PSA when compared to the wider Goad town centre boundary, principally due to the concentration of the number of vacancies along George Street, The Graftons, Stamford Square and Stamford New Road.

Vacant units are broadly dispersed throughout Altrincham, with the only exception being a small concentration of vacant units around the junction of George Street and Regent Road, and at The Grafton Centre. The primary benefit of vacant units being dispersed throughout the centre is that no area has the appearance of being dominated by empty units, and the vacancies are generally less noticeable. It is felt that re-use of The Grafton Centre would help to improve the southern end of George Street, and act to encourage re-letting of currently vacant units. We note that the Council is currently in the process of sourcing a development partner to redevelop The Grafton Centre in order to complement recent improvements in Altrincham's offer. In our view, it is this area of Altrincham centre which now offers the greatest potential for further regeneration, which would help drive footfall around the southern part of the centre.

It should also be noted that at the time of our survey the former New Look store at George Street was under alteration, and has since been subdivided and let to Søstrene Grene and Orangetheory Fitness.

Miscellaneous

Altrincham accommodates a number of offices and places of employment, and its overall offer is supported by three dental surgeries, two nurseries, two health centres, a place of worship, an accountant and a tourist information centre. Altrincham therefore plays an important role as an employment destination, and there are a wide range of services that are likely to result in a number of linked trips into the centre.

Pedestrian Flows

Strong pedestrian flows were noted throughout the pedestrianised areas of Altrincham at the time of our visit, with George Street, Shaw's Road and Greenwood Street forming the 'prime pitch' circuit in the centre. Accordingly, pedestrian activity was strongest in this area at the time of our visit and was noted to reduce with greater distance from George Street.

This has the consequence of driving activity along north-south routes, with the northern building line on Shaw's Road and George Street acting as a barrier to movement through the northernmost parts of Altrincham. The concentration of office space and non-town centre uses in this area reflecting this physical constraint.

The evening economy is strongest around areas with a high concentration of leisure service operators, with these radiating out from Altrincham Market and along Stamford New Road/Railway Street. Evening footfall is more limited on George Street (reflecting its retail nature), and is considered to be the inverse of the patterns noted during the day.

Accessibility

Altrincham Interchange, located in the east of the town centre and in close proximity to George Street, ensures that the town centre benefits from a high level of accessibility to areas in Trafford and throughout Greater Manchester. From this interchange bus, Metrolink and National Rail services can be accessed easily. Bus services run to destinations throughout Trafford, but also into Cheshire and other parts of Greater Manchester. Trams run every six minutes throughout the day into Manchester city centre, which can be reached in approximately 30 minutes. Train services run hourly to Chester and Manchester Piccadilly, linking Altrincham into the wider national rail network. Altrincham is therefore considered to benefit from excellent accessibility by public transport.

The town centre is also reasonably well integrated into the local, regional and national road network. This is reflected in the good standard of provision of car parking located throughout the centre, with a large multi-storey car park located at Stamford Quarter. This, in addition to large amounts of on-street car parking, ensures that the centre caters for those arriving by car.

The majority of primary routes through the centre are pedestrianised, with restricted access for cars. This makes for a pleasant shopping and leisure environment, and ensures that users feel safe when in the centre. It also helps to ensure high standards of accessibility for less mobile visitors.

Altrincham is well integrated into the established public transport network, and the town centre is pedestrianised to ensure safe accessibility for users. As such, the centre is generally accessible to residents across the Altrincham catchment.

Perception of Safety

Altrincham is a clean and well maintained centre, with low evidence of graffiti, vandalism or anti-social behaviour and littering at the time of our visit. The high quality public realm has created a centre that encourages users to maintain it, and even where there are vacant units, the environmental quality generally remains good. Pedestrianised areas ensure a high level of natural and passive surveillance, although this reduces during the evening along George Street given its retail focus. Peripheral areas, such as those in the north of the centre, benefit from a lesser level of footfall and have a lower perception of safety, as they lack an element of natural surveillance.

According to the website www.crime-statistics.co.uk, 228 crimes were reported within a mile radius of Altrincham town centre in August 2018.

This compares with 246 crimes reported across the same area in August 2017 and 202 in August 2016.

Environmental Quality

Altrincham has recently benefited from works to improve the public realm throughout the centre, which has appreciably improved the character of the centre. The pedestrian shopping areas (George Street and Cross Street) are pleasant shopping environments, and the provision of street furniture and some planting strengthen the overall setting of the centre. The strong independent sector helps in giving the centre a unique and varied character, which is enhanced by generally attractive shop frontages and façades. Furthermore, the historic nature of the town, with small back yards and narrow roads add architectural interest to the centre.

Although the environmental quality throughout the centre is a positive attribute, there are areas that are considered weaker. These include the now former Altrincham Library on Stamford New Road, which now appears of its time and offers a somewhat poor aspect to Altrincham Interchange. A new library opened in Pott Street in December 2018.

Whilst vacant units do not significantly detract from the overall environmental quality of the centre, the area along George Street around The Grafton Centre suffers from poorer shop frontages which creates a more negative impression of this part of the centre.

In summary, Altrincham is a pleasant centre in which to spend time, with an attractive and well-maintained public realm within which there was little evidence of litter or graffiti at the time of our visit.

Conclusions

Altrincham's principal strength is considered to be its strong leisure service offer, of which Altrincham Market is a key anchor. The centre also benefits from a high environmental quality, with a strong public realm and a good level of accessibility with links from Altrincham Interchange to areas throughout Trafford and Greater Manchester. Whilst the comparison goods offer is slightly more limited than may be expected for a centre of Altrincham's size (which is possibly a result of the proximity of the Trafford Centre), some interesting operators have opened in recent months and the centre accommodates some good high street names. Bringing forward additional residential development within or at the edge of the centre would present an opportunity to further strengthen the leisure service offer, and to support the centre as a whole.

Whilst Altrincham is considered to be a highly vital and viable centre, it could perhaps improve further through additional comparison to underpin its overall function. Given its upward trajectory, we believe there is currently an important opportunity to attract additional retailers (principally comparison goods) in order to expand its offer and underpin its overall offer. Further diversification through the delivery of town centre residential and office uses will help to create an attractive environment and

encourage additional footfall throughout both the day and evening and will assist in supporting other uses.

Strengths

Altrincham has a strong leisure offer with Altrincham Market being a key anchor. The centre's environmental quality and public realm are considered to be generally high, with the centre also having a good level of accessibility with links throughout Trafford from Altrincham Interchange.

Weaknesses

The comparison goods offer is considered to be weaker than the size of the centre might suggest, although the offer in Altrincham is similar to the average for Trafford. This deflated offer is possibly the result of impacts from the Trafford Centre.

Opportunities

Growth in the amount of residential development within and on the edge of the centre should help to further strengthen the leisure offer, and has the potential to improve the existing comparison goods offer.

Threats

Potential diversification of uses at Trafford Centre, especially around leisure services, may have some potential to reduce the diversity and vitality of the sector in Altrincham. At present the centre appears too reliant on the mid-market food and drink offer.

Sale Town Centre

Description

Sale town centre is focused around The Square Shopping Centre (which dates from the 1970s) and the pedestrianised part of School Road (which lies between Washway Road to the east and Springfield Road to the west). The centre serves a relatively extensive catchment, with residents of Sale, Sale Moor, Ashton-upon-Mersey and Brooklands looking to the town centre to help meet their retail needs. Whilst the shopping centre is of a somewhat tired appearance, the town centre is generally well maintained and is underpinned by its strong convenience goods retail offer (the centre accommodates Aldi, Sainsbury's and Tesco).

The centre lies adjacent to the M60 and M56 motorway corridors, approximately 8km to the south-west of Manchester city centre, which is easily accessible from public transport (including the Sale Metrolink stop located on Northenden Road, close to the Bridgewater Canal).

Status

Town Centre



Figure 1: Tesco store, Sale town centre



Figure 2: The Square Shopping Centre



Figure 3: Sale Town Hall



Figure 4: Waterside and Slug and Lettuce

Table 1 Town Centre Floorspace Composition – Goad Centre Boundary

GOAD Category	Floorspace at 2007 (%)	Floorspace at 2018 (sq.m)	Floorspace at 2018 (%)	Trafford Town Centre Floorspace at 2018 (%)	Floorspace UK Average at 2018 (%)
Convenience	20.6	15,140	23.8	18.4	15.3
Comparison	19.2	15,650	24.6	26.5	34.6
Retail Services	30.4	4,350	6.8	8.1	6.9
Leisure Services		13,630	21.4	24.7	25.2
Financial and Business Services		5,030	7.9	7.1	7.6
Miscellaneous	23.0	0	0.0	0.0	0.1
Vacant	6.8	9,980	15.7	15.1	9.9
Total	100.0	63,580	100.0	100.0	100.0

Source: Composition of Town Centre derived from Nexus Planning survey of October 2018 using Experian Goad survey area; Trafford Town Centre Floorspace (cumulative figure) derived from Nexus Planning survey of October 2018; UK Average from Experian Goad Report June 2018; Figures from 2007 sourced from Trafford Retail and Leisure Study 2007 (note 1)

Table 2 Town Centre Unit Composition – Goad Centre Boundary

GOAD Category	Units at 2007 (%)	Number of Units at 2018	Units at 2018 (%)	Trafford Town Centre Units at 2018 (%)	Units UK Average at 2018 (%)
Convenience	9.2	21	8.1	6.9	9.1
Comparison	30.4	63	24.3	25.6	30.5
Retail Services	47.5	44	17.0	17.7	14.6
Leisure Services		61	23.6	24.2	24.1
Financial and Business Services		37	14.2	11.6	10.2
Miscellaneous	2.3	0	0.0	0.0	0.1
Vacant	10.6	34	13.1	14.0	11.3
Total	100.0	259	100.0	100.0	100.0

Source: Composition of Town Centre derived from Nexus Planning survey of October 2018 using Experian Goad survey area; Trafford Town Centre Units (cumulative figure) derived from Nexus Planning survey of October 2018; UK Average from Experian Goad Report June 2018; Figures from 2007 sourced from Trafford Retail and Leisure Study 2007 (note 1)

Table 3 Town Centre Facilities

Type of Provision		Total
Key Anchor Store	Tesco, Sainsbury's, Wilko, B&M Bargains, M&S Foodhall	53
Other National Retailers	Aldi, Barclays, Bathstore, Betfred, British Heart Foundation, Bon Marche, Boots, Bridgfords, Caffè Nero, Card Factory, Co-operative Food, Coral, Costa, David Pluck, EE, Farmfoods, Greggs, Halifax, Holland & Barrett, Leeds Building Society, Lloyds, Max Spielmann, Nationwide, Natwest, New Look, Oxfam, Peacocks, Poundland, Quality Save, Reeds Rains, Ryman, Santander, Scope, Select, Skipton, Specsavers, Sue Ryder Care, Superdrug, The Money Shop, The Slug & Lettuce, Thomas Cook, Thornley Groves, Thorntons, Timpson, Vodafone, WH Smith, William Hill	
Community Facilities	Two physiotherapy clinics, two dental surgeries, a health centre and a veterinary practice	6

Source: Composition of Town Centre derived from Nexus Planning Survey of October 2018

Table 4 Major Retailers Present

Department Stores		Clothing	
Debenhams	0	Burton	0
House of Fraser	0	Dorothy Perkins	0
John Lewis	0	H&M	0
Marks & Spencer	0	Monsoon Accessorize	0
Mixed Goods Retailers		New Look	1
Argos	0	Next	0
Boots the Chemist	1	Primark	0
TKMaxx	0	River Island	0
W H Smith	1	Topman	0
Wilko	1	Topshop	0
Supermarkets		Other Retailers	
Sainsbury's	1	Carphone Warehouse	0
Tesco	1	Clarks	0
Waitrose	0	Clintons	0
		EE	1
		HMV	0
		O2	1
		Superdrug	1
		Vodafone	1
		Waterstones	0

Source: Composition of Town Centre derived from Nexus Planning survey of October 2018; Major retailers are the 30 operators identified by Experian Goad as being the most likely to improve the appeal of a centre

Overall Composition

- Overall there are 259 units located within Sale town centre. These account for 63,580 sq.m of commercial floorspace.
- The current vacancy rate within the Goad Centre Boundary is recorded as being 15.7% of total commercial floorspace and 13.4% of all units. In terms of the defined town centre boundary, the vacancy rates are lower at 7.6% of the floorspace and 10.6% of the units.
- Convenience and comparison uses account for 48.4% of floorspace and 32.4% of all units.
- Services uses (leisure, retail and financial and business) account for 36.1% of floorspace and 54.8% of all units.

Convenience & Comparison

Sale is dominated by convenience and comparison goods operators, which together account for 48.3% of floorspace and 32.4% of all units in the centre. The proportion of floorspace in convenience and comparison goods use has increased since the previous survey was undertaken in 2007, but the number of convenience and comparison goods units has decreased.

Convenience goods operators are well represented in Sale, with the town centre being anchored by a Sainsbury's superstore and a Tesco superstore. There are a total of 21 convenience goods operators in the centre, accounting for 8.1% of all units in the centre and 15,140 sq.m of floorspace (which equates to 23.7% of the total stock of floorspace). In addition to the two supermarkets, operators include M&S Foodhall, Aldi, Farmfoods, six bakeries, three tobacconists, a delicatessen, a fishmonger and a health foods store.

There are 63 comparison goods retailers in Sale, accounting for 15,650 sq.m of floorspace, which equates to 24.5% of the total stock of floorspace. The proportion of comparison goods floorspace is only marginally lower than the average for Trafford town centres (which is 26.5%), but is significantly lower than the national average (34.6%). The comparison goods offer is focused around Wilko and B&M Bargains on Broad Road. The centre does have a limited fashion offer, with Peacocks, Select, New Look and Bon Marche being located within The Square Shopping Centre or along School Road. These units are principally associated with the value end of the fashion market. Other comparison goods operators include charity shops, jewellers, phone shops, gift shops, stationers and pharmacies.

The proportion of floorspace that is dedicated to comparison goods use is lower than both the national average and the average level of provision for Trafford town centres. This may, in part, be a consequence of the centre's commercial stock being dated and therefore of limited appeal to national multiple comparison goods operators. The ability to attract such operators will also be impacted by the centre's proximity to the Trafford Centre and to Manchester city centre.

According to therequirementlist.com, there are a number of retailers who are currently seeking premises in Sale, including Sue Ryder, Subway, Vets4Pets and KFC.

Services

The service goods offer in Sale is comparable to other centres in Trafford, however the centre is less reliant on leisure services and accommodates a smaller quantum of service floorspace than either Altrincham or Urmston. Leisure service uses account for 13,630 sq.m of floorspace (21.4% of the total stock of floorspace) and 61 units (23.5% of all units in the centre). Although leisure service operators account for less floorspace than in Altrincham or Urmston, the diversity of operators is considered to be more than sufficient to support the function of Sale as a town centre. The offering is dominated by 17 hot food take-aways, 11 restaurants and 10 cafés but also includes pubs, bars, betting offices, gyms, amusements and a theatre. National operators include William Hill, Costa and Tim Hortons, however the overwhelming majority of leisure service operators consist of independents.

Sale town centre's financial and business service offer is considered to be diverse, despite the closure of the RBS at 16-18 The Mall in August 2018. There are 37 financial and business operators which account for a total of 5,030 sq.m of floorspace (this figure equates to 7.9% of the total stock of floorspace in the centre). Operators include banks, employment agencies, estate agents, solicitors, pawnbrokers, and building contractors and merchants.

The retail service offer, which consists of 44 operators and accounts for 4,350 sq.m of floorspace, equates to 6.8% of the total commercial stock. This figure is similar to the UK national average for retail service provision, but is somewhat lower than the average level within Trafford's town centres (of 8.1%).

Sale is considered to have a reasonable service offer which is able to meet many of the needs of the surrounding residential population.

Vacancies

Sale has a vacancy rate in excess of the national average with respect to floorspace and units. There are a total of 34 vacant units throughout the town centre, which represents 13.1% of all units and accounts for 9,980 sq.m of floorspace (which equates to 15.7% of the total stock of commercial floorspace). At 2017, just 6.8% of floorspace in Sale was vacant, which indicates that the issue in respect of vacancies is relatively recent.

The high figure in respect of the proportion of floorspace that is vacant arises, in part, due to the three large units not currently being occupied: 22 Washway Road; the former Government Buildings on Cross Street; and, the former Vao restaurant at Sale Waterside. It is important to note that these units are located within the Goad centre boundary but outside of the defined town centre boundary. Whilst not located within the defined town centre, the reoccupation of these large vacancy units located just outside of the boundary will have positive impacts on the overall health of the centre.

In any event, using the defined town centre boundary, the vacancy rate was recorded at 4,040 sq.m which equates to 7.6% of the total stock of commercial floorspace, and 22 units which equates to 10.6% of the total. These figures are lower than for the centre as a whole as the former Magistrates and the vacant unit on Washway Road lie beyond the town centre boundary.

Miscellaneous

There are a number of offices located within Sale town centre, with a number of these located in large buildings on Washway Road.

Additionally there are two physiotherapy clinics, two dental surgeries, a health centre and a veterinary practice. It is therefore clear that Sale provides a range of services that are likely to encourage linked trips into the centre.

Pedestrian Flows

The actual town centre is fairly compact, and ease of movement through the main retail core is ensured by the pedestrianised areas that currently exist. Seamless pedestrian flows are compromised by the confused pedestrian crossing layout at the junction of School Road with Springfield Road and Tatton Road. There may be the potential to improve pedestrian access through this junction to allow a straightforward entry point into the pedestrianised core from the Metrolink station and areas to the east of the centre.

Whilst the central parts of the town centre (The Square Shopping Centre and parts of School Road) are pedestrianised and make for a safe shopping environment, the peripheral parts of Sale town centre are more dominated by vehicular traffic. We note that Planit IE and Civic Engineers have undertaken a Sale Town Centre Public Realm and Movement Strategy on behalf of the Council which was approved by the Council's Executive in September 2018. The Strategy seeks to identify key interventions in order to create a more functional town centre and encourage inward investment. The Strategy suggests that Sale currently lacks a 'kind of specialness that makes residents proud to belong there and visitors eager to come and be a part of the streetlife.' The Strategy focuses on: improved traffic solutions and easier connectivity (junction by Town Hall, Washway Road/Cross Street, Sibson Road, and Ashfield Road); and, public realm improvements (School Road, Town Hall, Waterside Centre and bridge, family square in front of The Square, and Northenden Road).

Such improvements would encourage pedestrian traffic throughout the town centre and help tie together parts of the centre that are of a different character. In turn, this should encourage a broader range of users throughout the centre.

Accessibility

Sale is located on a number of key transport routes through Trafford. This includes Sale Metrolink station, located in the east of the centre which provides services between Altrincham and Bury, via Manchester city centre which can be reached in less than 20 minutes. From Manchester city centre

further connections are available on the rail network to destinations throughout Greater Manchester and beyond. The town centre is also well served by a number of bus services which are accessible from the A56 and along Northenden Road. Bus services provide frequent connections to destinations throughout Trafford, south Manchester, Stockport and Manchester city centre.

The A56, which runs along the western edge of the town centre, is a key arterial road through Trafford and forms a main commuter route into Manchester city centre. This route links Sale to key regional roads including the M60 and the M56. A high number of parking spaces are available in and around the town centre, including on-street car parking. Large car parks are located at Broad Road, The Square Shopping Centre, Friars Road and Hereford Road.

Perception of Safety

Sale town centre, as a well-used destination, benefits from a high level of natural and passive surveillance. This is particularly the case throughout the pedestrianised areas through The Square Shopping Centre and along School Lane. Furthermore, the lack of passing traffic through these areas, and the generally slow moving vehicles throughout the rest of the centre, with the exception of Washway Road, ensures that pedestrian safety is secured.

At the time of our visit there was little or no graffiti, vandalism or anti-social behaviour noted in the centre. This, in addition to the prohibition of vehicles from using most of the centre, ensures that Sale town centre is a largely safe and secure destination during the day.

However, the 'core' of the town centre is very quiet in the evening as the focus of School Road is retail and there are relatively few restaurants, bars and pubs to draw people in after dark. As such, parts of Sale that are busier and popular during the day can feel less secure after 6pm.

According to the website www.crime-statistics.co.uk, 208 crimes were reported within a mile radius of Sale town centre in September 2018. This compares with 215 crimes reported across the same area in September 2017 and 210 in September 2016.

Environmental Quality

Sale town centre is located in close proximity to a variety of greenspaces, including the Bridgewater Canal and Bridgewater Way. This provides a unique feature that the centre, for historic reasons, generally turns its back to. This is slowly being addressed, primarily through the development of Sale Waterside which provides a location for enjoying the canal and its environment.

The majority of the town centre benefits from a range of historic and period buildings, including Sale Town Hall, which help to create a sense of place.

The pedestrianised shopping streets have a functional and somewhat uninspiring, public realm. School Lane is lined by trees with some street furniture, however the trees appeared to be slightly overgrown at the time of our visit. In addition, the quality of shopfronts in Sale is variable, with a number of premises having modern signs which do not relate well to buildings on which they sit.

The quality of the environment proximate to the large Tesco and Sainsbury's superstores is impacted by the amount of car trips associated with the convenience uses.

It will be important for the Council and stakeholders to act upon the recommendations of the Sale Town Centre Public Realm and Movement Strategy in order to bring about tangible improvements on the ground. Such improvements should encourage investment in the town centre, including Maloneyview's proposed redevelopment of the southern part of The Square Shopping Centre to accommodate a large-scale mixed-use development (planning application reference 94986/FUL/18). The Maloneyview proposal incorporates 202 residential units (accommodated in two towers), a cinema, retail units and a multi-storey car park, and is undetermined at the time of reporting. The application was approved at committee during the first half of 2019 and is currently awaiting the signing of a Section 106 Agreement.

We believe that there is a real opportunity in Sale town centre to appreciably improve the public realm and wider environment in order to attract modern operators and help reposition the centre.

Conclusions

Sale has a higher than average vacancy rate and an offer which is somewhat one-dimensional, being highly reliant on its convenience goods shopping anchors. Sale's comparison goods operators are generally at the budget end of the market and there is a proliferation of 'pound' shops and household goods operators. The environment around The Square Shopping Centre is also uninspiring and in need of renewal.

Notwithstanding this, the strength of the convenience goods offer (which is focused around Aldi, Sainsbury's and Tesco) is such that parts of Sale benefit from strong footfall. However, we believe that the comparison goods and leisure service sectors could be improved in order that the centre can meet more of the needs of its catchment population. Sale does benefit from a high level of accessibility, through the Metrolink and wider bus network, but public transport routes could be better linked to the town centre. As mentioned, the Town Centre Public Realm and Movement Strategy seeks to provide for improve access throughout the town centre in order to help address this issue. Public realm improvements may also help better utilise the Bridgewater Canal, which is one of the town's key assets.

In summary, Sale town centre would significantly benefit from a more diverse and modernised offer, in order that its appeal extends further than

convenience goods shopping. Improvements to the public realm and the centre’s evening offer could help underpin the centre’s future vitality and viability, and help attract further development. Residential development in the area could also improve footfall and help support local businesses.

Strengths

Sale has a particularly strong convenience goods offer, which allows the catchment population to meet most of their needs close to home. The Sale Waterside development accommodates Council offices, the library and the Robert Bolt Theatre and is well used. The centre also accommodates a range of financial and business services, which provide an important local function.

Weaknesses

The centre is of a somewhat tired appearance, particularly The Square Shopping Centre and along School Road. The public realm is also dated and shopfronts are of a variable quality. The composition of the centre and the quality of operators does not necessarily reflect local catchment.

Opportunities

Further residential uses may help increase footfall and help underpin the vitality and viability of the catchment. Parts of Sale’s catchment are affluent and there is the potential to modernise the offer in order to provide more comprehensively for the needs of residents. Sale is in need of further key anchors in order to draw custom into the town, and the proposed Maloneview development would substantially diversify the town centre offer and support additional activity through the evening.

Threats

When considering the provision within the Goad Centre Boundary, the centre has a higher than average vacancy rate, although this is inflated by two large vacant units on Washway Road. However, both of these units are located outside of the defined town centre, and whilst the centre would benefit from reoccupation of these units, the vacancy rates within the defined town centre boundary are substantially lower in terms of both the proportion of units and floorspace.

The period of time that the former Vao unit at Sale Waterside has been vacant is also a cause for concern, as are the increasing number of vacancies in The Square Shopping Centre. The centre is in transition and it is important that it ‘moves with the times’ in order to provide for its future vitality and viability.



- Adopted Town Centre Boundary
- Comparison
- Convenience
- Financial & Business Services
- Leisure Service
- Miscellaneous
- Retail Service
- Vacant

125 metres



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Stretford Town Centre

Description

Stretford is located in a densely populated area, and is the northern most town centre in Trafford. It is located at a prominent location on the A56 corridor, with good public transport links. In terms of the quantum of floorspace and the number of units it accommodates, Stretford is the smallest town centre in Trafford. The centre is dominated by Stretford Mall which was part of the late 1960s/early 1970s redevelopment of the town. A number of important community facilities are located in Stretford, such as Stretford Public Hall and Stretford Library.

The centre has suffered in recent years due to competition from other town centres and out-of-centre retail destinations, resulting in an increased vacancy rate. As a consequence, there have been significant changes at Stretford Mall the past few years, including the redevelopment of surface car parking on the western side of the Mall for an Aldi foodstore and the demolition of the southern part of the Mall (which includes the former market hall and O'Brien's public house).

Status Town Centre



Figure 1: Stretford Mall and pedestrian route



Figure 2: Aldi store, Stretford



Figure 3: Demolition site adjacent to the mall



Figure 4: Essoldo Cinema

Table 1 Town Centre Floorspace Composition – Goad Centre Boundary

GOAD Category	Floorspace at 2007 (%)	Floorspace at 2018 (sq.m)	Floorspace at 2018 (%)	Trafford Town Centre Floorspace at 2018 (%)	Floorspace UK Average at 2018 (%)
Convenience	16.4	2,040	8.0	18.4	15.3
Comparison	47.5	9,030	35.5	26.5	34.6
Retail Services	24.8	900	3.5	8.1	6.9
Leisure Services		1,800	7.1	24.7	25.2
Financial and Business Services		920	3.6	7.1	7.6
Miscellaneous	3.3	0	0.0	0.0	0.1
Vacant	8.0	10,720	42.2	15.1	9.9
Total	100.0	25,410	100.0	100.0	100.0

Source: Composition of Town Centre derived from Nexus Planning survey of October 2018 using Experian Goad survey area;; Trafford Town Centre Floorspace (cumulative figure) derived from Nexus Planning survey of October 2018; UK Average from Experian Goad Report June 2018; Figures from 2007 sourced from Trafford Retail and Leisure Study 2007 (note 1)

Table 2 Town Centre Unit Composition – Goad Centre Boundary

GOAD Category	Units at 2007 (%)	Number of Units at 2018	Units at 2018 (%)	Trafford Town Centre Units at 2018 (%)	Units UK Average at 2018 (%)
Convenience	10.0	11	10.3	6.9	9.1
Comparison	45.4	31	29.0	25.6	30.5
Retail Services	22.3	13	12.1	17.7	14.6
Leisure Services		8	7.5	24.2	24.1
Financial and Business Services		7	6.5	11.6	10.2
Miscellaneous	3.8	0	0.0	0.0	0.1
Vacant	18.5	37	34.6	14.0	11.3
Total	100.0	107	100.0	100.0	100.0

Source: Composition of Town Centre derived from Nexus Planning survey of October 2018 using Experian Goad survey area;; Trafford Town Centre Units (cumulative figure) derived from Nexus Planning survey of October 2018; UK Average from Experian Goad Report June 2018; Figures from 2007 sourced from Trafford Retail and Leisure Study 2007 (note 1)

Table 3 Town Centre Facilities

Type of Provision		Total
Key Anchor Store	Quality Save, Peacocks, WH Smith	32
Other National Retailers	02, Aldi, Barnardo's, Bon Marche, Boots, BP, Brighthouse, British Heart Foundation, Card Factory, Clarks, EE, Fragrance Shop, Greggs, Halifax, Heron Foods, Holland & Barrett, JD, Ladbrokes, Lloyds, Max Spielmann, Nationwide, Post Office, Pound Bakery, Pure Gym, Select, Shoe Zone, Spar, Specsavers, Three	
Community Facilities	Stretford Library, Stretford Public Hall, place of worship, dental surgery and a child care centre	5

Source: Composition of Town Centre derived from Nexus Planning Survey of October 2018

Table 4 Major Retailers Present

Department Stores		Clothing	
Debenhams	0	Burton	0
House of Fraser	0	Dorothy Perkins	0
John Lewis	0	H&M	0
Marks & Spencer	0	Monsoon Accessorize	0
Mixed Goods Retailers		New Look	0
Argos	0	Next	0
Boots the Chemist	0	Primark	0
TKMaxx	0	River Island	0
W H Smith	1	Topman	0
Wilko	0	Topshop	0
Supermarkets		Other Retailers	
Sainsbury's	0	Carphone Warehouse	0
Tesco	0	Clarks	1
Waitrose	0	EE	0
		HMV	0
		O2	0
		Superdrug	0
		Vodafone	0
		Waterstones	0
		Clintons	0

Source: Composition of Town Centre derived from Nexus Planning survey of October 2018; Major retailers are the 30 operators identified by Experian Goad as being the most likely to improve the appeal of a centre

Overall Composition

- Overall there are 107 commercial units located within Stretford town centre. These account for 25,410 sq.m of commercial floorspace.
- The current vacancy rate within the Goad Centre Boundary is recorded as being 42.2% of total commercial floorspace and 34.6% of all units.
- Convenience and comparison uses account for 43.5% of floorspace and 39.3% of all units. When considering the vacancy rates within the defined town centre boundary, the proportions are slightly lower at 37.5% of the floorspace and 31.5% of the units.
- Services uses (leisure, retail and financial and business) account for 14.2% of floorspace and 26.1% of all units.

Convenience & Comparison

Convenience and comparison retailers are well represented in Stretford. There are a total of 42 operators located in the centre, accounting for a total 11,070 sq.m of floorspace which equates to 43.6% of the total stock of commercial floorspace.

Stretford has the highest proportion of comparison floorspace for any centre in Trafford, with 35.5% of floorspace being in this use, which is comparable to the current national average figure. However, the proportion of town centre floorspace in comparison goods use was previously 47.5%, which indicates a weakening in the comparison goods offer over the past decade. This can be attributed to the continued success of higher order retail destinations, such as Manchester city centre and the

Trafford Centre, and substantial growth in comparison goods internet shopping.

The range of comparison goods retailers that remains is focused around the budget end of the market. There are a total of 31 comparison goods operators (accounting for 9,030 sq.m of floorspace), which include charity shops, clothes shops, chemists and phone goods shops. A number of national multiple operators have a presence in Stretford including Boots, WH Smith and Quality Save.

There are 11 convenience goods operators in the centre, which account for 2,040 sq.m of floorspace (equating to 8.0% of the total stock of commercial floorspace). The range of operators is diverse, including an Aldi foodstore, three bakeries, a butcher, a tobacconist and a number of small convenience stores and newsagents.

Whilst the new Aldi store opened in July 2016, there have been some high profile departures from Stretford Mall in recent years, including Tesco Metro in December 2017.

However, the range and composition of retailers has changed in Stretford, with the departure of Tesco Metro in December 2017 and, before that, the closure of TJ Hughes and the market.

According to therequirementlist.com there are a number of retailers that are seeking premises in the area, including Sue Ryder, Vets4Pets and Lidl (the latter of which opened in early 2019 at the former PC World unit further north down Chester Road).

Services

Stretford has a very limited service offer, which is both lower than that found in any other centre in Trafford and much lower than the current national average. There are 28 services units which account for 3,620 sq.m of floorspace, or 14.2% of the total stock of commercial floorspace.

There are 10 leisure service operators in Stretford, including three cafés, a restaurant, hot-food takeaway, amusements, a betting office and a gym. These units account for 1,800 sq.m of floorspace, which equates to 7.1% of total floorspace in the centre. This figure is much lower than both the national average, and the average of the four Trafford town centres. Stretford's leisure service offer therefore lacks the diversity of comparable centres both nationally and within Trafford. This is possibly due to the fact that the centre, dominated as it is by Stretford Mall (which closes at 8pm at the latest) lacks a night-time economy, and consequently there are fewer restaurants, bar and pubs that are indicative of such activity. However we are aware of expressions of interest from a number of food and drink operators towards the vacant ground floor units along Chester Road.

Since Nexus' visit Stretford Foodhall (located immediately to the south of Stretford Mall) opened in July 2019. Containing street food stalls, a bar and coffee counter alongside small goods vendors, we are aware that this has

initially proven to be well-used, and could act as an anchor to encourage greater levels of footfall in the centre. Furthermore it could represent an increased trend of leisure operators locating the centre, particularly along Chester Road.

The retail service and financial and business service provision in Stretford is also modest when compared with the composition of centres nationally, and the composition of Trafford's town centre.

There are 13 retail service operators located in the centre, which account for a total of 900 sq.m of floorspace and equate to 3.5% of the total stock. Retail service operators include hairdressers, beauty salons, opticians, a photo developer and a Post Office. Similarly the financial and business service offer, consisting of seven operators, including three banks (Lloyds, Halifax and Nationwide), an estate agent and an employment agency. The banks perform an important local role and help Stretford perform the role of a town centre.

Vacancies

Stretford has the highest vacancy rate of any defined centre in Trafford. In total, 10,720 sq.m of floorspace, across 37 units within the Goad centre boundary, is vacant. This comprises 42.2% of all floorspace and 34.6% of all units. As such, the vacancy rate in Stretford is significantly in excess of the current national average vacancy rate.

Indeed, the vacancy rate has increased considerably since 2007 (with the proportion of floorspace that is vacant increasing from 8.0% to 42.2%). As such, it is clear that the vacancy rate represents a significant challenge in securing Stretford's future vitality and viability.

The above analysis takes into consideration the units along Edge Lane which most substantially comprises the former Essoldo Cinema and attached units, which are not located within the defined town centre boundary. When solely considering units within the defined town centre boundary, the vacancy rate is 37.5% of the total stock of commercial floorspace and 31.5% of the units.

However, a programme of large-scale redevelopment, consisting initially of the wholesale demolition of the former Market and the units along Chester Street Mall, commenced in early 2018. This, it is hoped, will consolidate the offer at Stretford Mall and allow for the future introduction of additional uses, including residential, which will help support the centre by bringing additional footfall and expenditure into the centre. Furthermore, we are aware that there are a number of food and drink operators who are interested in taking space within the town centre, and that the unit adjacent to Pure Gym is currently under alteration to house 'Stretford Foodhall', which aims to be both a convenience store and café/bar and entertainment venue.

Furthermore, whilst located outside of the town centre boundary, the reoccupation or redevelopment of the units on Edge Lane and Chester Road will have wider benefits for Stretford town centre.

Miscellaneous

Within the Goad centre boundary, there are few community facilities located within Stretford. Stretford Library is located to the north of the centre on Kingsway and performs an important role for the local community. In addition, there is also a place of worship, a dental surgery, and a child care centre. None of the community facilities are located within the defined town centre boundary.

Pedestrian Flows

Stretford is located in an area surrounded by residential development. However, Stretford Mall is a covered shopping centre and, to some degree, turns its back on the surrounding residential areas. This is exacerbated due to the centre's proximity to the A56 Chester Road and the A5145 Kingsway, which act as barriers to pedestrian movement from neighbouring residential areas.

Although pedestrian crossings are provided at appropriate locations along these two highways, the volume of vehicle movements is still considered a major impediment in respect of accessibility. Consequently, the routes to the town centre appear to be dominated by traffic and the road network. These factors, together with the ample car parking provision, act to discourage pedestrian traffic to the centre.

Within the Mall itself, pedestrian footfall is generally moderate and reflective of a centre that has been in decline in recent years. The demolition of part of the centre may help in consolidating the offer and concentrating footfall within a smaller area.

Direct access into the centre from car parks, and from bus stops adjacent to the centre on Kingsway ensure the centre has a high level of direct accessibility.

Accessibility

Stretford is located at the junction of the A56 and the A5145, and therefore benefits from very high levels of accessibility to the local, regional and national road networks. Conversely, these routes somewhat negatively impact pedestrian movement, and act as barriers to movement from Stretford Mall to the residential areas immediately surrounding the centre.

Public transport is also readily accessible from the centre, with multiple bus services per hour running from Kingsway and Chester Road to Manchester, Stockport, Altrincham Urmston and the Trafford Centre. Metrolink services run from Stretford Metrolink station up to every six minutes throughout the day, with services running between Altrincham and Bury, thereby linking the centre directly into Manchester city centre. Although the centre lacks direct national rail connections, train stations are located in Stretford (approximately 1.5 kilometres from the centre) and in Manchester city centre.

It is felt that the greatest impediment to accessibility through Stretford are the arterial routes that bisect it. Stretford Metrolink does not effectively work as a gateway into the centre due to its physical separation from the Mall. The removal of the remaining pedestrian subways, which are unappealing and dark, and their replacement with pedestrian crossings would help to make the centre more accessible to all pedestrians.

Perception of Safety

As a covered shopping centre, Stretford Mall feels generally secure. There are considerable levels of passive and natural surveillance, and there are considerable levels of visible CCTV throughout the centre.

There was limited evidence of graffiti, vandalism or anti-social behaviour at the time of our visit. However, the areas beyond the centre (particularly those set back from the primary routes through Stretford) generally feel less safe and secure. There are large areas of the centre that lack active ground floor uses (partly a result of the level of vacancy, but primarily caused by large blank walls) and have no passive or natural surveillance.

According to the website www.crime-statistics.co.uk, 194 crimes were reported within a mile radius of Stretford town centre in September 2018. This compares with 223 crimes reported across the same area in September 2017 and 265 crimes in September 2016.

Environmental Quality

Stretford Mall opened in 1969 and, as a result, appears somewhat dated and 'of its time' in the modern era. The environment within Stretford Mall is of a moderate quality, both as a consequence of its dated design and due to the amount of vacant units. Whilst the Mall is spacious internally, the centre lacks a significant area of public space to act as a non-retail focus.

In addition, whilst the Chester Road entrance to Stretford Mall was the subject of a significant public realm scheme earlier in 2018 (which has had a beneficial impact in improving the attractiveness of the immediate environment), the new soft landscaping was in need of maintenance at the time of our visit. As set out above, the road network generally dominates the area surrounding the centre, and the remaining pedestrian subways laid under Chester Road are poorly maintained and covered in graffiti.

Stretford Mall was designed to be 'inward-looking', with few active ground floor frontages. Consequently the centre has a number of inactive frontages, with service yards fronting onto Kingsway providing a particularly poor aspect. Equally, vacant units on Edge Lane, including the Grade II former Essoldo Cinema do not currently provide as positive an impression as they should.

The Refreshed Stretford Masterplan, published in January 2018, provides a comprehensive plan to transform Stretford through encouragement of private investment, delivering new leisure facilities and improvements to public spaces and supporting new housing and town centre facilities. This plan, along with the proposed mixed-use development at Lacy Street,

represent significant opportunities to improve the quality of the town centre.

Conclusions

Stretford town centre has an extremely high vacancy rate and has an environment that is of moderate quality (notwithstanding recent beneficial improvements around its Chester Road entrance). In addition, part of the centre are relatively poorly maintained, which is a consequence of the limited demand for stock.

Whilst Stretford contains some important local facilities (and its offer has been boosted by the Aldi), its future vitality and viability is uncertain. However, Stretford is surrounded by large residential areas and the demolition of the southern part of the Mall provides an opportunity to introduce new uses which could support additional footfall and activity in the area.

At present, Stretford town centre has issues in respect of the high vacancy rates throughout the centre, low levels of pedestrian activity, and a generally moderate standard of environmental quality. The centre has been impacted by custom migrating to higher order centres and a lack of investment, both of which have compromised its overall vitality.

In addition to the redevelopment of Stretford Mall a number of schemes have emerged in and around Stretford town centre in recent times (including the Stretford Masterplan, which was adopted in January 2018, and proposed mixed use development at Lacy Street) that will provide significant opportunities to improve the retail and leisure offer of the centre, and to improve the environmental quality of Stretford.

Strengths

Stretford has a relatively good comparison goods offer (albeit not as strong as it has historically been), with the highest proportion of comparison floor space of any town centre in Trafford. However, the comparison operators are generally value/lower-end retailers. The centre also benefits from good connectivity, particularly on public transport.

Weaknesses

The centre suffers from high vacancy rates, which are both the highest of the Borough's town centre and higher than the national average. This negatively impacts the centre's composition, which has a poor service offer. Stretford Mall is an inward looking centre, offering no reason for people to 'pass through' and detracting from the rest of the centre. Stretford Mall is of its time and is not visually appealing.

Opportunities

Demolition work is ongoing in respect of the southern part of Stretford Mall, which previously accommodate the market and O'Brien's public house. The clearance of this site offers an opportunity to help address problems arising from the inward-looking nature of the centre and to improve the overall quality of the centre. The Stretford Masterplan and the proposed mixed

Threats

The high vacancy rates, and the dated environmental quality of units surrounding the centre, threaten the overall vitality of the centre. Similarly the expansion of retail facilities on Chester Road/White City has increased competition and reduced reasons to visit centre.

use development at Lacy Street can help to realise this.



- Adopted Town Centre Boundary
- Comparison
- Convenience
- Financial & Business Services
- Leisure Service
- Miscellaneous
- Retail Service
- Vacant



North



Urmston Town Centre

Description

Urmston is located approximately 9.7km to the south west of Manchester city centre. The centre serves the communities of Urmston, Davyhulme and Flixton and is focused around Eden Square. This £45 million development replaced the dated shopping precinct which was demolished in 2007. Other key assets in the centre include Urmston Market and Sainsbury's Superstore. The centre also benefits from its proximity to Urmston railway station. Despite the proximity of competing retail destinations, such as Trafford Retail Park and the Trafford Centre, Urmston has successfully managed to maintain a vacancy rate below the national average and the average for Trafford town centre. The centre accommodates a diverse range of retailers and services that are considered suitable to serve the needs of the Urmston community.

Status

Town Centre



Figure 1: Sainsbury's, Eden Square



Figure 2: Eden Square Commercial Units



Figure 3: Whetherspoons, Flixton Road



Figure 4: Commercial Units and on-street parking along Flixton Road

Table 1 Town Centre Floorspace Composition – Goad Town Centre Boundary

GOAD Category	Floorspace at 2007 (%)	Floorspace at 2018 (sq.m)	Floorspace at 2018 (%)	Trafford Town Floorspace at 2018 (%)	Floorspace UK Average at 2018 (%)
Convenience	5.4	7,430	22.3	18.4	15.3
Comparison	29.3	6,860	20.6	26.5	34.6
Retail Services	36.3	4,710	14.1	8.1	6.9
Leisure Services		8,980	27.0	24.7	25.2
Financial and Business Services		2,940	8.8	7.1	7.6
Miscellaneous	10.5	0	0.0	0.0	0.1
Vacant	18.5	2,370	7.1	15.1	9.9
Total	100.0	33,290	100.0	100.0	100.0

Source: Composition of Town Centre derived from Nexus Planning survey of October 2018 using Experian Goad survey area; Trafford Town Centre Floorspace (cumulative figure) derived from Nexus Planning survey of October 2018; UK Average from Experian Goad Report June 2018; Figures from 2007 sourced from Trafford Retail and Leisure Study 2007 (note 1)

Table 2 Town Centre Unit Composition – Goad Town Centre Boundary

GOAD Category	Units at 2007 (%)	Number of Units at 2018	Units at 2018 (%)	Trafford Town Centre Units at 2018 (%)	Units UK Average at 2018 (%)
Convenience	4.8	17	9.0	6.9	9.1
Comparison	27.4	41	21.7	25.6	30.5
Retail Services	47.1	43	22.8	17.7	14.6
Leisure Services		49	25.9	24.2	24.1
Financial and Business Services		21	11.1	11.6	10.2
Miscellaneous	3.4	0	0.0	0.0	0.1
Vacant	17.3	18	9.5	14.0	11.3
Total	100.0	189	100.0	100.0	100.0

Source: Composition of Town Centre derived from Nexus Planning survey of October 2018 using Experian Goad survey area; Trafford Town Centre Units (cumulative figure) derived from Nexus Planning survey of October 2018; UK Average from Experian Goad Report June 2018; Figures from 2007 sourced from Trafford Retail and Leisure Study 2007 (note 1)

Table 3 Town Centre Facilities

Type of Provision		Total
Key Anchor Store	Sainsbury's	33
Other National Retailers	Aldi, Anytime Fitness, Argos, Barclays, Barnardo's, Boots, Bridgfords, Cancer Research UK, Card Factory, Co-operative Funeralcare, Coral, Costa, Domino's, Greggs, Halifax, Hallmark, Iceland, Martins, McColls, Natwest, Poundland, Quality Save, RSPCA, Santander, Shelter, Subway, Thornley Groves, Thorntons, TSB, Well Pharmacy, WH Smith, William Hill	
Community Facilities	Two dance schools, two educational establishments, a medical centre, a dental surgery and a train station	7

Source: Composition of Town Centre derived from Nexus Planning Survey of October 2018

Table 4 Major Retailers Present

Department Stores		Clothing	
Debenhams	0	Burton	0
House of Fraser	0	Dorothy Perkins	0
John Lewis	0	H&M	0
Marks & Spencer	0	Monsoon Accessorize	0
Mixed Goods Retailers		New Look	0
Argos	1	Next	0
Boots the Chemist	1	Primark	0
TKMaxx	0	River Island	0
W H Smith	1	Topman	0
Wilko	0	Topshop	0
Supermarkets		Other Retailers	
Sainsbury's	1	Carphone Warehouse	0
Tesco	0	Clarks	0
Waitrose	0	EE	0
		HMV	0
		O2	0
		Superdrug	0
		Vodafone	0
		Waterstones	0
		Clintons	0

Source: Composition of Town Centre derived from Nexus Planning survey of October 2018; Major retailers are the 30 operators identified by Experian Goad as being the most likely to improve the appeal of a centre

Overall Composition

- Overall there are 189 units located within Urmston town centre. These account for 33,290 sq.m of commercial floorspace.
- The current vacancy rate within the Goad centre boundary is recorded as being 7.1% of total commercial floorspace and 9.5% of all units. Within the defined town centre boundary, the vacancy rate is lower at 6.4% of the floorspace and 8.2% of the units.
- Convenience and comparison uses account for 42.9% of floorspace and 30.7% of all units.
- Services uses (leisure, retail and financial and business) account for 49.9% of floorspace and 59.8% of all units.

Convenience & Comparison

Eden Square acts as a key commercial destination for convenience and comparison goods uses in Urmston, with the centre anchored by a Sainsbury's and Aldi foodstore at Eden Square. There are 58 convenience and comparison goods operators in Urmston, accounting for 30.7% of all units and 14,290 sq.m of floorspace which equates to 42.9% of the total stock of commercial floorspace.

Convenience goods operators account for 7,430 sq.m of floorspace and equate for 22.3% of the total stock of commercial floorspace. The 17 convenience operators (which account for 9.0% of all units in Urmston) include Sainsbury's, Aldi, Iceland, a number of convenience stores, two tobacconists, a butcher, a baker, a delicatessen and a health food store. Additionally, Urmston Market (which comprises a small market hall along

with outdoor stalls) is open on Tuesdays, Fridays and Saturdays, and provides an alternative convenience goods destination. We understand that in addition to the M41 redevelopment, proposals to regenerate the existing Urmston Indoor Market Hall are well progressed. It is believed that along with an element of retail provision this redevelopment is likely to include 12 residential apartments. Convenience goods floorspace has increased greatly from 2007, largely as a result of the Eden Square development.

There are 41 comparison goods operators in Urmston, which account for 6,860 sq.m of floorspace and equate to 20.6% of the total stock of commercial floorspace. Operators include Boots, Quality Save, Argos (as a concession within the Sainsbury's) and Well Pharmacy, alongside a range of independent and smaller retailers. The range of comparison operators in Urmston is considered to be strong, even with the number of competitor destinations located in close proximity to Urmston. Although there are a number of high-quality independent operators, there are a number of under-represented sectors including fashion and electronic goods.

According to therequirementlist.com there are a number of retailers who have a need for premises in Urmston, including Savers, Pizza Hut, Dominos, Snap Fitness and Amber Taverns.

Services

Urmston has a relatively strong service offer. Approximately half of the total stock of retail floorspace is in leisure, retail or financial and business service use. Urmston therefore has the greatest amount of service floorspace and operators of any town centre in Trafford, and a relatively strong offer for a centre of its size.

Notwithstanding this, the financial and business service sector has contracted somewhat with the closure of the RBS bank at 2-4 Crofts Bank Road. There are 21 financial and business service operators which account for 2,940 sq.m of floorspace (equating to 8.8% of the total stock). Despite the loss of RBS, there are still five banks (Barclays, Halifax, NatWest, Santander and TSB) with a presence in Urmston, alongside a number of estate agents, employment agencies, solicitors and financial planners.

There are 43 retail service operators in Urmston, occupying 22.8% of all units and accounting for 4,710 sq.m of floorspace (which equates to 14.1% of the total stock). Operators are diverse and include a number of hairdressers, beauty salons, opticians, undertakers, shoe repairers, a car repair garage and a Post Office. Although retail service operators are overrepresented compared to the national average (which equates to 6.9% of floorspace and 14.6% of units), the range of operators is considered to be one of Urmston's key strengths.

Urmston is considered to have a particularly strong leisure service offer, with 49 operators (equating to 25.9% of all units in the centre) accounting for 8,980 sq.m of floorspace, which equates to 27.0% of all commercial floorspace. This figure is greater than both the national and Trafford town

centre average for leisure services, and is indicative of the key role leisure uses play in underpinning Urmston. The diversity of leisure service operators is considered to be diverse and sufficient to ensure that Urmston is a vital destination at all times of the day. Operators include pubs, bars, cafés, restaurants, hot-food takeaways, betting offices and health centres. It is anticipated that, with the opening of Market 41 (which will provide a new-build food market, dining areas and space for pop-up stalls and events), the leisure service offer will be further expanded and the vibrancy of the centre at all times of the day will be strengthened. The market is due to open in 2019.

Vacancies

Of the four town centres in Trafford, Urmston has the lowest vacancy rate in terms of units and floorspace. The vacancy rate within the Goad centre boundary is also lower than the national average, with 7.1% of floorspace vacant (compared to 9.9% nationally) and 9.5% of units (compared with 11.3% nationally). Vacant floorspace has decreased significantly from the level (18.5%) recorded in 2007. Using the defined Town Centre boundary, the vacancy rate was recorded at 2,030 sq.m which equates to 6.4% of the total stock of commercial floorspace, and 15 units which equates to 8.2% of all units.

The greatest number of vacant units are found to the south of the train line which divides Urmston into distinct 'north' and 'south' areas. Victoria Parade, an inward looking 1960s precinct, has the greatest concentration of vacant uses, with a number of vacant units located towards the southern end of Station Road. Relatively few vacancies are noted in the north of the centre, indicating the positive impacts that the Eden Square development has had in driving footfall. Consideration should therefore be given to encouraging activity throughout the whole centre, possibly including the future redevelopment of Victoria Precinct. A notable exception to the 'north-south' vacancy pattern is the former RBS unit at 2-4 Crofts Bank Road, which occupies a prime frontage at a key junction in Urmston. However, we note that since the site visit was undertaken, this unit has subsequently been occupied by Specsavers and is therefore no longer vacant.

A temporary solution to vacant units, particularly those occupying prime locations in the centre, could include allowing independent retailers to create window displays in vacant units, or encouraging 'pop-up shops' to provide short-term leases for new and local retailers.

Miscellaneous

As with all town centres in Trafford, Urmston has a wide variety of non-retail and community facilities located within it. These include two dancing schools, two educational establishments, Gloucester House Medical Centre, a dental surgery and Urmston train station. In addition, Urmston accommodates a number of offices, an accountant and a Royal Mail Sorting Office. These features demonstrate that Urmston town centre has a key role for the surrounding communities.

Pedestrian Flows

At the time of our visit pedestrian flows were noted as being strongest to the north of the centre and around the Eden Square Shopping Centre. This is reflective of the role of the Sainsbury's superstore, which anchors the centre, and the Shopping Centre's large car park. Pedestrian activity is notably lighter along Station Road and Gloucester Road. Consequently alternative uses should be found to drive activity throughout the centre at all times of the day, with Victoria Parade on Higher Road presenting an ideal redevelopment site within the centre.

Accessibility

Urmston town centre is well integrated into the surrounding transport network. The town is bordered to the north and east by the M60 motorway, with junctions 9 and 10 of the motorway being located approximately one mile from the town centre. This provides direct and convenient access from the town centre to the wider regional and national road network. Equally the provision of considerable car parking (which is free for up to three hours) is also beneficial in encouraging visitors into the town centre. Additional car parks are located at Park Road North, Manor Avenue and Atkinson Avenue, with on-street parking available on Flixton Road, Gloucester Road and Crofts Bank Road.

Urmston train station is located within the town centre boundary and serves the Manchester-Liverpool line, which provides direct access to Liverpool South Parkway (which provides services for Liverpool Airport) and into Manchester city centre, which can be reached in under 10 minutes. Whilst Urmston does not have a Metrolink station, it is well served by the bus network, which provides direct services throughout Greater Manchester to destinations including Manchester city centre, Stockport and Altrincham. The town centre is therefore well served by a variety of transport, ensuring convenient access to and from the centre at all times of the day.

Perception of Safety

A centre focused around a small shopping centre and traditional high streets, Urmston has few areas that lack natural or passive surveillance. Accordingly the centre is judged to have a high level of user safety. This is somewhat compromised by the high numbers of vehicles that move through the centre, particularly along Crofts Bank Road/Station Road. The pedestrian footpath in this area is narrow, resulting in a perception that vehicle movements are prioritised over pedestrians in Urmston. However pleasantly there was little to no evidence of graffiti, vandalism or anti-social behaviour noted in Urmston at the time of our visit.

According to the website www.crime-statistics.co.uk, 185 crimes were reported within a mile radius of Urmston town centre in September 2018. This compares with 166 crimes reported across the same area in September 2017 and 171 in September 2016.

Environmental Quality

Urmston has a number of fine buildings within the centre which provide an attractive centre but lacks any defining characteristics. The number of independent retailers are considered to be beneficial to the environmental

quality of Urmston in providing a diverse and unique street scene. Furthermore, Eden Square Shopping Centre, although well-maintained, also lacks any defining character. The development of M41 on the site of the current market on Railway Road will provide a 'focal' point that will define Urmston as a destination and add further character to the centre's offer.

As noted above, generally Urmston lacks anything in the way of defining character or a strong public realm. Whilst the area around Eden Square provides a somewhat functional 'town square', there are few features that would encourage users to spend time in the area rather than simply move through the space. Additionally in areas beyond Eden Square, although the centre is pleasant and some roads are lined by trees and street furniture, there is significant traffic along Crofts Bank Road and Flixton Road that can, at times, detract from the appeal of the centre.

Conclusions

Urmston is a pleasant and largely functional centre, focused around Eden Square Shopping Centre and a strong service offer. The centre's comparison offer is limited (due to competitor destinations in the vicinity) but this has allowed Urmston to develop a number of niche and independent retailers. The realisation of the M41 redevelopment of Urmston Market is thought to offer an opportunity to further diversify the service offer.

The centre is divided into two distinct 'halves', with considerable lower levels of pedestrian activity noted to the south of the train line at the time of our visit. Consideration should be given to redeveloping areas of dilapidation or vacancy in this area, most notably Victoria Parade on High Road.

Notwithstanding this, Urmston is considered to be a vital and viable centre.

Strengths

Eden Square Shopping Centre provides a modern, attractive centre, which benefits from the presence of Sainsbury's as anchor and a good selection of other operators. The centre has a high level of accessibility to public transport, with Urmston train station located in the centre. The centre is generally pleasant and feels safe and secure. Urmston has the lowest vacancy rate for a town centre in Trafford.

Weaknesses

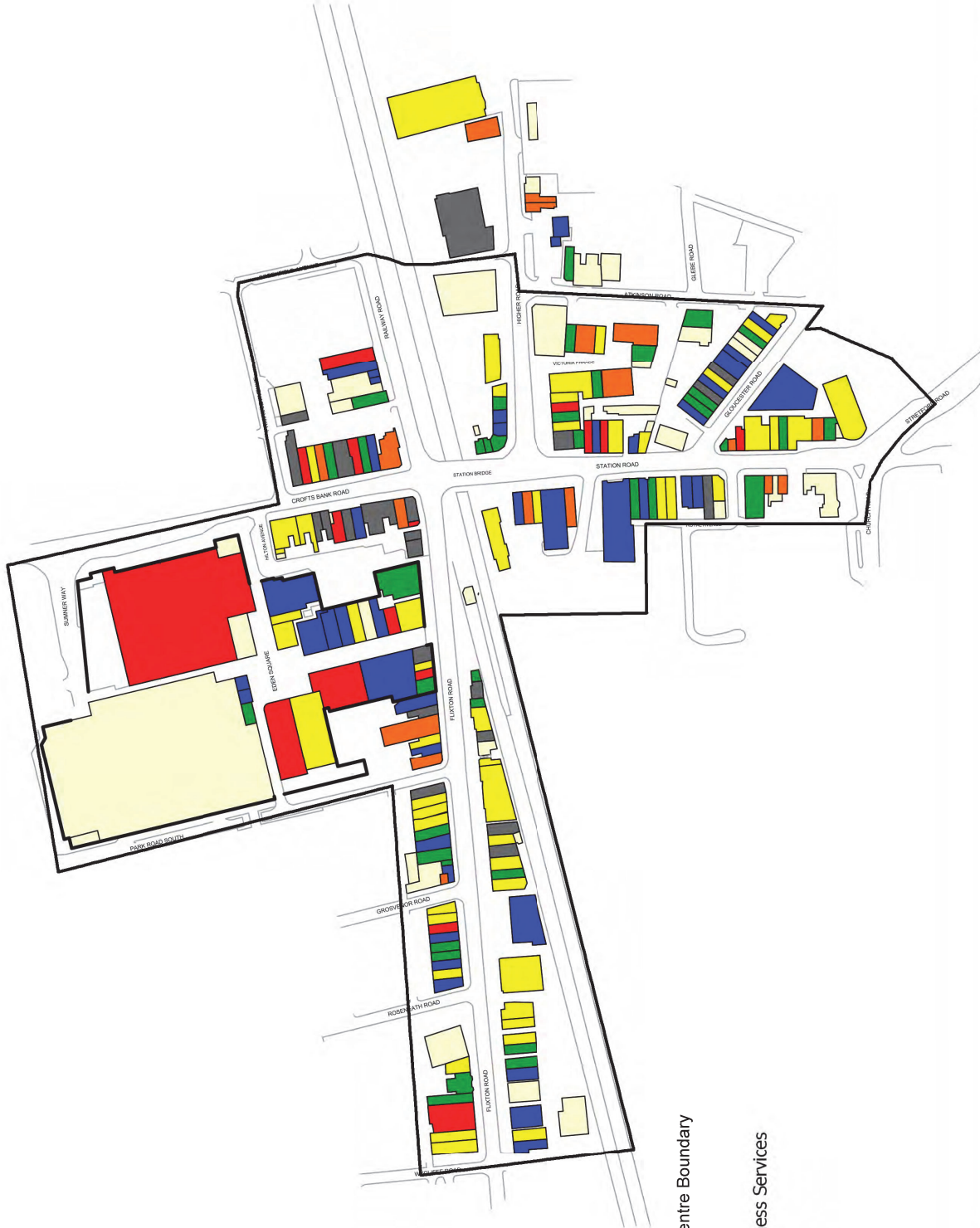
The comparison goods offer is generally limited and lacks any significant clothing and footwear operators (this is not unexpected given the size of the centre and its proximity to the Trafford Centre). The composition of uses has a greater bias towards convenience goods retailing than is typically found in a town centre.

Opportunities

The M41 Urmston Market redevelopment, on the site of the current market, is considered to provide an ideal opportunity to diversify the offer in the centre. Potential reuse/redevelopment of the Victoria Parade is also a significant, as yet unrealised, opportunity.

Threats

Urmston is located in close proximity to the Trafford Centre and Trafford Retail Park, which could act to further reduce the vitality and viability of the centre in the future. This is particularly a concern for comparison goods operators.



- Adopted Town Centre Boundary
- Comparison
 - Convenience
 - Financial & Business Services
 - Leisure Service
 - Miscellaneous
 - Retail Service
 - Vacant



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