TRAFFORD COUNCIL
BOROUGH RETAIL AND LEISURE STUDY

November 2007
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PREFACE

The Trafford Retail and Leisure Study has been commissioned by Trafford Council as independent research to provide an objective evidence base to inform the preparation of the Trafford Local Development Framework (LDF). The contents of this report do not represent the policy of Trafford Council and any views expressed herein are those solely of GVA Grimley LLP. The identification of any sites or buildings within this study does not imply that Trafford Council would grant planning permission for retail or leisure development. Similarly, it does not preclude identified sites being developed for other suitable uses or preclude the possibility of retail or leisure development being granted on sites that have not been formally identified as part of this study. Any planning applications will continue to be treated on their own individual merits in accordance with the up-to-date statutory planning policy framework for the Borough.
1. INTRODUCTION

1.1 Trafford Council commissioned GVA Grimley in June 2007 to undertake a comprehensive assessment of the future shopping and leisure needs of the borough, with particular focus on the four main town centres of Altrincham, Sale, Stretford and Urmston and the local centre of Partington.

1.2 The study provides a composite picture of retail and leisure provision within the borough, identifying potential requirements for new floorspace and considers where such new provision might come forward. This will enable the Council to develop a robust suite of Local Development Framework (LDF) documents which will replace the existing adopted Unitary Development Plan (UDP).

1.3 The study will also inform the Council’s Core Strategy, which will set out the spatial vision and strategic objectives of the planning framework for the borough as a whole, and also the Partington Area Action Plan (AAP), which will set out proposals for this priority regeneration area.

1.4 The study will also provide a basis for the Council to make future development control decisions on retail and leisure proposals and proactively plan for additional development.

1.5 The main terms of reference for the study can be summarised as follows:

- To understand the existing behaviour of the catchment through detailed shopper surveys so as to fully identify convenience, comparison (bulky and non-bulky) goods and leisure expenditure patterns;
- To understand the future quantitative capacity for new comparison and convenience retail floorspace across the borough in the period up to 2021;
- To undertake health checks of the principal town centres within the borough, including the three district centres of Hale, Sale Moor and Timperley;
- To qualitatively appraise the performance of the main town centres and Partington against national benchmark data and understand operator demand for new retail and leisure facilities;
- To provide initial views on broad locations within or adjacent to the four main town centres and Partington for future retail and leisure development if a need (quantitative or qualitative) is identified; and
• To provide strategic advice on the overall future retail and leisure need and the implications for policies and strategies being considered by the Council in its Core Strategy Issues and Options for the Local Development Framework.

1.6 In addition to the main outputs of the study, the Brief also requires the following area-specific assessments:

• A review of the potential for change within the three district centres of Hale, Sale Moor and Timperley;
• A general review of other Local and Neighbourhood Centres and their ability to meet local convenience shopping needs; and
• A review of the convenience retail needs in the Broadheath area and future options to meet any identified gaps in provision.

1.7 In order to deliver the requirements of the brief and to ensure the assessment is appropriately and robustly informed, we have drawn on comprehensive in-centre and household telephone survey responses, town centre health checks and a review of competing retail and leisure provision.

1.8 Our quantitative capacity forecasts draw on the household telephone survey results to identify the respective town centres current market shares as a basis for understanding the implications of and the potential for expenditure growth in relation to retail and leisure floorspace provision. The results of the full quantitative analysis and qualitative appraisal are then drawn together, along with the identification of competition from planned and proposed improvements in competing centres outside of the borough to provide a set of recommendations to enable the Council to proactively plan for future retail and leisure development.

1.9 The structure of the study is as follows:

**Part 1 – Background detail and context**

**Section 1 - Introduction**

**Section 2** – sets out the background national and regional policy framework which guides retail and leisure development, and which provides the context for the study, methodology and findings.
Section 3 – provides the general background context provided by national trends in the retail and leisure markets and the implication of these as retail and leisure provision within key centres.

Section 4 – sets out the detail of existing and emerging pattern of retail and leisure provision in the wider sub-region which could potentially impact upon existing centres within the Borough.

Part 2 – Trafford Retail Context and Centre Health Check

Section 5 – reviews existing retail provision within Trafford.

Section 6 – reports on the town centre health-check findings;

Section 7 – summaries the headline results of the in-centre shopper survey exercise

Part 3 – Quantitative and Qualitative Appraisal

Section 8 – sets out the research methodology underpinning the quantitative modelling and capacity exercise.

Section 9 – undertakes a review of the current performance and market shares of the defined town centre based catchment zones and considers forward capacity.

Section 10 – undertakes a review of current performance in relation to bulky and non-bulky comparison goods

Section 11 – assesses the potential for an increase in market share based on the existing performance of the respective catchment zones and the principal centres to which they relate

Section 12 – considers quantitative and qualitative gaps in leisure provision within the principal town centres of the borough

Part 4 – Area Specific Assessments

Section 13 – assesses potential development site opportunities within the principal town centres within the borough

Section 14 – undertakes the area specific assessments on the future for potential change in the three district centres of Hale, Sale Moor and Timperley.

Section 15 – undertakes an assessment of the future for potential change in the local centres of Partington and Broadheath

Part 5 – Conclusions and Strategic Advice
2. PLANNING POLICY FRAMEWORK

2.1 In this section we set out the key themes issues arising out of statutory planning policy framework against which future retail considerations within the borough will be considered.

PPS1 – Delivering Sustainable Development

2.2 PPS1 was issued in February 2005 and sets out the overarching planning policies on the delivery of sustainable development through the planning system. The guidance confirms that sustainable development is the core principle underpinning planning, clarifying that at the heart of sustainable development is the simple idea of ensuring a better quality of life for everyone today and for future generations.

2.3 The Government makes clear that planning should facilitate and promote sustainable and inclusive patterns of urban and rural development through a number of initiatives, including the need to ensure that new developments provide good access to jobs and key services for all members of the community. In promoting sustainable development, the Government reaffirms through the guidance that, amongst other things, the planning system needs to:

- Recognise that economic development can deliver environmental and social benefits;
- Make suitable land available for development in line with economic, social and environment objectives – ensuring that suitable locations are available for industrial, commercial, retail, tourism and leisure development, so that the economy can prosper;
- Promote urban and rural regeneration to improve the well-being of communities, improve facilities, promote high quality and safe development and create new opportunities for the people living in those communities. Promote mixed-use developments for locations that allow the creation of linkages between different uses and can thereby create more vibrant places;
- Provide improved access for all jobs, health, education, shops, leisure and community facilities, open space, sport and recreation, by ensuring that new development is location where everyone can access services or facilities on foot, bicycle or public transport rather than having to rely on access by car, while recognising that this may be more difficult in rural areas; and
- Promote the more efficient use of land through higher density, mixed-use development and the use of suitably located previously developed land and buildings; bring vacant
and under-used previously developed land and buildings back into beneficial use to achieve the targets the Government has set for development on previously developed land.

2.4 Whilst PPS1 sets the key objectives for the planning system, the guidance does not replace or override other national policies and should be read in conjunction with other statements of national planning policy.

2.5 Supplementing existing guidance in PPS1, the Government published a consultation draft PPS1 supplement in December 2006 to address how spatial planning should contribute towards reducing emissions and stabilising climate change. The PPS details the decision-making principles that local planning authorities should adhere to and that climate change considerations should be integrated into all spatial planning concerns, including transport, housing, economic growth and regeneration and should not considered separately.

**PPS3 – Housing**

2.6 The Government issued PPS3 in November 2006 and significant emphasis is placed on achieving sustainable development. In planning for housing, one of the Government’s key objectives is to deliver housing developments in suitable locations which are easily accessible and well-connected to a good range of community facilities, jobs, key services (including retail) and infrastructure. Providing housing as part of mixed-use town centre development is particularly encouraged.

**PPS6 – Planning for Town Centres**

2.7 PPS6 was issued in March 2005 and represents the Government’s most up to date expression of policy in relation to retail and leisure uses. At the outset the guidance states that the Government’s key objective for town centres is to promote their vitality and viability by planning for the growth and development of existing centres and by focussing development in such centres, encouraging a wider range of services in a good environment, accessible to all. The guidance identifies the main town centre uses which fall within the scope of control and goes on to re-affirm that it is not the intention of any part of policy to restrict competition, preserve commercial interests or prevent innovation.

2.8 In urging authorities to actively plan for identified growth and to manage change within centres, the guidance suggests that better use should be made of existing land and buildings through increasing the density of development, identifying opportunities etc. The guidance suggests that where growth cannot be accommodated in existing centres
authorities should plan for the extension of the primary shopping area – subject to appropriate integration in terms of both means of access and design. Where existing centres are in decline the guidance notes that planning authorities should seek to consolidate and strengthen those centres by seeking to focus a wider range of services, promote the diversification of uses and improve the environment.

2.9 The guidance urges a pro-active, plan-led approach to the management and control of retail development. It reiterates the role of local level plans in identifying a spatial vision and strategy for existing centres alongside the importance of promoting high quality design and safety.

2.10 PPS6 guidance also acknowledges that street and covered markets can make a valuable contribution to local choice and diversity and vitality. Local authorities are encouraged to seek to retain and enhance existing markets, ensuring they remain attractive and investing in their development and promotion where required.

2.11 In considering the scope for future development, the guidance suggests that local planning authorities should:

- Assess the need for development, placing greater weight on quantitative need but also taking account of qualitative considerations;
- Identify the appropriate scale of development within town centres;
- Apply the sequential approach to site selection (i.e. in centre, followed by edge of centre, then accessible out of centre opportunities);
- Assess impacts, both positive and negative; and
- Ensure locations are accessible (in accordance with the sustainability provisions identified in PPS1 and PPG13).

2.12 The guidance goes on at paragraph 2.31 to suggest that planning authorities may need to make choices between competing development pressures in town centres and should use the allocation of new sites to secure their strategy for strengthening and improving the performance of a centre, particularly those areas requiring regeneration. In planning for growth, local authorities are urged to allocate sufficient sites to meet an identified need for a forward period of at least 5 years, with the use of compulsory purchase powers if necessary to ensure that suitable sites are brought forward for development.

2.13 The guidance suggests that the same range of considerations should be applied by planning authorities in assessing proposed developments.
PPG13 – Transport

2.14 Published in March 2001, PPG13 details how local authorities should integrate transport and land use planning for all types of development. The key aims of PPG13 are to promote:

- More sustainable transport choices for both people and for moving freight;
- Accessibility to jobs, shopping, leisure facilities and services by public transport; and
- Reduction of the need to travel, especially by car.

2.15 PPG13 lies at the core of the Government’s sustainable development strategy by seeking to reduce the need to travel with the aim of reducing the overall environmental impacts of transport. In order to deliver the objectives of this guidance, local authorities are directed to (amongst others):

- Actively manage the pattern of urban growth to make the fullest use of public transport, and focus major generators of travel demand in city, town or district centres and near to major public transport interchanges;
- Locate local and day-to-day facilities so that they are accessible by walking and cycling;
- Plan for increased density of development for both housing and other uses at locations which are highly accessible by public transport, walking and cycling; and
- Ensure that development comprising jobs, shopping, leisure and services offers a realistic choice of access by public transport, walking and cycling, recognising that this may be less achievable in some rural areas.

2.16 With particular respect to retail development, PPG13 endorses the need to promote the vitality and diversity of existing town centres, emphasising the sequential approach to new development.

Planning White Paper

2.17 The Government published the Planning for a Sustainable Future White Paper in May 2007 with formal consultation running until mid August. With respect to retail policy, the White Paper proposes changes to the current town centre ‘first’ policy articulated in PPS6, although little detail is provided.
2.18 However, it is understood that the Government will publish proposals in the summer to replace the current impact and need tests with a single test that has a strong focus on town centres but which promotes competition and improves consumer choice while avoiding the unintended effects of the current need test.

Regional Spatial Strategy for the North West

2.19 RPG13 for the North West was adopted in March 2003 and following commencement of the Planning & Compulsory Purchase Act in September 2004, became the Regional Spatial Strategy, forming part of the statutory development plan. Town centre policy, as articulated in policy EC8, reflects the sequential requirements set out within PPG/S 6.

2.20 In accordance with statutory requirements, a replacement RSS is presently being progressed with the Examination in Public (EiP) panel report being recently published in May 2007 in advance of a scheduled RSS adoption date in late 2007.

2.21 In terms of emerging retail policy, the draft replacement RSS proposes a three tier hierarchy of centres in which comparison retail development is to be encouraged. Whilst Manchester and Liverpool City Centres are identified as regional centres, policy W5 identifies a network of 24 primary retail centres, which form the second hierarchical tier.

2.22 With respect to Trafford, whilst the centres of Stretford and Sale were nominated as ‘tier 2 centres’ at the independent examination, only Altrincham, by virtue of its sub-regional size and retail composition, is identified as a second tier primary retail centre along with other comparable centres such as Warrington, Stockport and Macclesfield.

2.23 In terms of policy detail, the draft replacement RSS seeks to promote retail investment in the regeneration and economic growth of a centre, where it is consistent with the scale and function of the centre and would not undermine the vitality and viability of any other centre or result in the creation of unsustainable shopping patterns.

2.24 In addition to seeking a sustainable distribution of high quality retail facilities outside of the regional poles (Liverpool / Manchester), draft replacement RSS emphasises that there will be a presumption against large-scale extensions to existing out-of-centre regional / sub-regional comparison retailing facilities such as the Trafford Centre or indeed any new retail facilities of such a scale.
Trafford Unitary Development Plan (UDP)

2.25 The revised Unitary Development Plan (UDP) was adopted in June 2006 and its policies will be saved for three years, or until they are replaced by new Development Plan Documents (DPDs), which will form part of the wider Local Development Framework (LDF).

2.26 The retail policies within the adopted UDP state are set out in summary below.

Part One Policies

2.27 **Policy S1 – New Shopping Development** states that new retail development will be permitted within established town, district, local and neighbourhood shopping centres, as defined on the Proposals Map, where such development extends the choice and service to the public and does not significantly undermine the vitality or viability of any nearby town or district centre as a whole.

2.28 Largely articulating PPS6 guidance, the policy goes on to state that new retail development in edge or out-of-centre locations will not be permitted unless supported by clear evidence of quantitative and qualitative need as well as a demonstration of sequential compliance and appropriateness of scale.

2.29 However, the policy makes clear that the Council will seek to avoid the sporadic siting of comparison bulky goods units outside of the existing defined centres or defined non-food retail warehouse parks.

2.30 **Policy S2 – Trafford Centre** makes clear that the centre is not classified as an established town or district centre and that any proposals for further retail development will be treated as out-of-centre development.

2.31 **Policy S3 – Improving the Main Shopping Centres** emphasises that Council will seek to improve the environment and infrastructure of the main shopping areas by ensuring that all new developments are conveniently located in relation to public transport and are of a good quality in terms of landscaping and the physical environment.

2.32 **Policy S4 – Local and Neighbourhood Centres** provides that the Council will seek to maintain local and neighbourhood shopping provision to the degree necessary to ensure that local residents’ day-to-day shopping needs are adequately met.
Part Two Policies

2.33 Policy S5 – Development in Town and District Shopping Centres specifically seeks to promote further growth of Altrincham as a shopping centre of sub-regional importance and provides for the incremental growth, consolidation and improvement of the town centres of Sale, Stretford and Urmston as well as the district centres of Hale, Sale Moor and Timperley.

2.34 However, where suitable locations for retail development are not available within the identified town and district centres, planning permission may be granted on sites immediately adjoining the centres provided that the proposal can (amongst others) be satisfactorily integrated with the existing shopping centres in terms of scale, appearance, layout and access.

2.35 Policy S6 – Development in Altrincham Town Centre states that the Council will promote and grant planning permission for the development and redevelopment in Altrincham Town Centre as indicated on the UDP Inset Proposals Map. In particular, policy S6 identifies 5 key sites for development within the town centre (Stamford New Road / Railway Street, Greenwood Street, Altrincham Town Hall site and Kingsway) for a mix of retail and commercial town centre uses.

2.36 In addition to promoting major development opportunities, policy S6 also confirms that the Council will undertake highway, public transport and environmental improvement works within the town centre so as to improve the physical town centre environment.

2.37 Policy S7 – Development in Sale Town Centre provides that a new focus for the town centre around Sale Town Hall and the Bridgewater Canal-side area will be promoted through the development of new uses including new Council offices and commercial uses (largely completed through Sale Waterside scheme). In addition, the policy specifies that the Council will promote the redevelopment of land between the A56 (Chester Road) and Hayfield Street for appropriate town centre uses as well as supporting efforts to upgrade facilities at the Six-Acre Centre and also public transport facilities within the town centre.

2.38 Policy S8 – Development in Stretford Town Centre seeks to consolidate and enhance the vitality and viability of the town centre through favouring proposals for the redevelopment of properties along Edge Lane and the A56 frontages for town centre related activities. In addition, the policy is supportive of the development of the Newton Street / Lacy Street Car Park for business use in order to contribute to the retail and commercial regeneration of the town centre. Policy support for improvements in the
physical appearance of the town centre and surrounding public buildings are particularly supported and encouraged.

2.39 **Policy S9 – Development in Urmston Town Centre** sets out the requirement for the comprehensive redevelopment of the town centre, including the provision of a large modern foodstore within the town centre. This policy aspiration has now largely been met through the Ask Developments scheme, which has been granted planning permission and has recently been subject of a Compulsory Purchase Order (CPO) Inquiry.

2.40 In addition to the main town centre regeneration aspirations, policy S9 also seeks to promote wider town centre regeneration through improvements to the physical environment, landscape, design and public transport facilities.

2.41 **Policy S10 – Local and Neighbourhood Shopping Centres** provides that the Council will maintain and enhance the retail function of local and neighbourhood shopping centres through permitting new retail development where the development is of a scale appropriate to the size of the centre and does not materially impact on existing town and district centres. In addition, the policy states that the Council will promote the development of a new local shopping centre at Sinderland Road in Broadheath to serve the significant new housing development proposed there. This is subject to a separate area-specific assessment later in this report.

2.42 **Policy S11 – Development Outside Established Centres** states that proposals for retail development not on land within town or district centres (or otherwise specifically allocated in the UDP) will not be permitted unless (amongst others) there is a demonstrable need, that the proposal is sequential compliant, taking into account the preference for in-centre and then edge-of-centre sites within existing town and district centres before local and neighbourhood centres and only then out-of-centre sites. In addition, proposals must be highly accessible by a choice of means of transport.

2.43 **Policy S12 – Retail Warehouse Park Development** confirms that non-food retail warehouse development will be concentrated within the three existing retail warehouse parks (Altrincham Retail Park, Trafford Retail Park and White City Retail Park) and the area presently being developed as Barton Square (UDP area TCA1D adjacent to Trafford Centre). Policy continues to specify that other than within these areas, the Council will not permit the sporadic siting of comparison / bulky goods units outside of the defined centres or along road corridors.
2.44 New development proposals arising within the three existing retail warehouse parks will only be granted planning permission where they comply with detailed development control policies.

2.45 **Policies S13 and S14 – Non Shop Uses with Town, District or Local / Neighbourhood Centres** provide that planning permission will only be granted for changes of use from A1 to Class A2 / A3 – A5 where proposals conform with the provisions of the detailed development control policies and do not cause significant harm to the diversity and vitality of the centre’s principal role.

**Trafford Local Development Framework (LDF)**

2.46 The Council’s Local Development Scheme (LDS) has been submitted for approval to the Department for Communities and Local Government (DCLG). Work on the preparation of the Core Strategy evidence base, which this study will inform, commenced in early 2007 and will look ahead in the period to 2021. It will form the context and platform for the preparation of detailed Development Plan Documents (DPDs).

2.47 Preparatory work on an Area Action Plan (AAP) for Partington has recently commenced and the Council is presently formally consulting on issues and options. With respect to the Land Use Allocations DPD, it is understood that the Council has started work on its evidence base, although it has not progressed significantly to date.

2.48 In addition to the above and as part of the Council’s Local Development Framework (LDF), the Council has recently adopted (March 2007) the A56 Corridor Development Guidelines Supplementary Planning Document (SPD) to set out guidelines for developments and environmental improvements. The SPD focuses in particular on four themes; Opportunity Areas, Street Scene, Safety and Accessibility and Green Infrastructure.
3. CURRENT RETAIL AND LEISURE TRENDS

3.1 This section examines key trends and drivers for change in the retail and leisure industry. This review is drawn from a range of published data sources, including up-to-date research by Verdict Analysis, Mintel and the New Economics Foundation.

**Income and Expenditure Trends**

**National Overview**

3.2 In order to put our assessment of the quality of existing provision and the need for additional floorspace into context, it is relevant to consider the wider economic and social trends likely to influence retailing and leisure within the Borough.

3.3 Incomes and expenditure have shown strong growth over the last 20 years, with retail expenditure growing faster than incomes. At the same time working hours have generally lengthened leading to a cash rich, time poor consumer. Overall retail expenditure has increased by about 4% per annum in real terms over the last 20 years, with most of this growth on comparison goods rather than convenience goods, where growth has been less than 1% per annum. Comparison goods growth has been close to 5% per annum over the last 30 years, over 6% per annum over the last 20 years and even stronger over the last 10 years.

3.4 However, these strong trends are not expected to continue in the foreseeable future due to current high levels of consumer debt, an already low savings ratio and a weakening housing market. Over the next 5-10 years the latest economic forecasts provided by Experian Business Strategies suggest that comparison goods expenditure growth will be about 3.5 - 4.5% per annum.

3.5 With longer working hours for many, shop opening hours in the larger centres have been extended and Sunday is now one of the strongest trading days in the week. This has implications for where retail expenditure is concentrated and the nature of some shopping trips which are considered to be a quasi leisure experience. Longer working hours, plus the Internet and broadband technology have lead to a huge growth in non-store shopping, albeit from a small base. Total non-store trading including mail order and the internet is currently estimated to be about 2.5% of convenience goods spending and about 6% of comparison goods spending. The latest forecasts suggest continuing strong growth over
the next 5-10 years before a plateau is reached at about double the current proportions of expenditure.

**Greater Manchester Trends**

3.6 According to the Greater Manchester Forecasting Model, the total population within Trafford Borough is projected to rise from 215,600 in 2007 to 218,301 in 2014 and 221,688 by 2021, representing a 1.25% growth in the period 2007 – 2014; 1.55% growth in the period 2014 – 2021 and an overall growth of 2.8% between 2007 and 2021.

3.7 In comparison, the total population growth in Greater Manchester is projected to increase from c. 2.56 million in 2007 to c. 2.61 million in 2014 (1.86% growth 2007 – 2014) and to c. 2.67 million in 2021 (2.28% growth 2014 – 2021), giving an overall growth rate of 4.2% growth over the period between 2007 – 2021.

3.8 At the regional level, the North West population is projected to grow from c. 6.88m in 2007 to c. 6.98m in 2014 and c. 7.11m in 2021, equating to 1.55% growth in the period between 2007 - 2014; 1.79% between 2014 – 2021; and overall, 3.4% between 2007 – 2021. Consequently, whilst the population projections highlight the total population in Trafford Borough is expected to increase during the lifetime of its Local Development Framework, the forecasted growth is below the scale projected for both Greater Manchester and the wider North West region.

3.9 With respect to the total working age population, the Greater Manchester Forecasting Model predicts that the working age population in Trafford will increase from c. 137,000 in 2007 to c. 141,000 in 2014 and c.146,000 in 2021, representing a 3.24% increase between 2007 – 2014; a 3.40% increase between 2014 – 2021; and an overall increase of 6.7% over the period 2007 – 2021. This overall increase (6.7%) in the working age population over the period 2007 – 2021 is greater than the projected 6% increase in the North West region in the same period on the basis of the working age population growing from c. 4.34 million in 2007 to c. 4.6 million in 2021. However, the overall growth in the working age population in Trafford is considerably lower than that projected for the Greater Manchester sub region, where the working age population is scheduled to grow from c. 1.65m in 2007 to c. 1.77m in 2021, which represents a 7.3% increase.

3.10 In terms of understanding as to whether Trafford Borough has a particularly ‘ageing’ population, the Greater Manchester Forecasting Model results show that the over 60’s population is projected to increase from c. 39,800 in 2007 to c. 40,300 in 2014 and c. 41,500 in 2021, equating to increases of 1.27% (2007 – 2014), 2.76% (2014 – 2021) and
overall, 4.1% (2007 – 2021). This compares favourably however with Greater Manchester, where the over 60’s population is projected to increase from c. 450,000 in 2007 to c. 503,000 in 2021 (11.5% increase) and in the wider North West region from c. 1.33m in 2007 to c. 1.49m in 2021 (12.6% increase). Therefore, whilst Trafford's population is projected to get older, the demographic modelling predicts that it will grow older at a significantly less rate than expected for the wider North West region.

3.11 Whilst no regional data is available on household formation in Trafford or the North West region, it is widely reported that nationally, the number of households has increased significantly in relation to the population growth, whilst household size has decreased with smaller families, more divorces, people living longer etc.

**Town Centre / High Street Retailing**

3.12 Despite the growth of out of town or out of town retailing, high street retailers (including those in shopping centres) totalled sales of £122.7 billion in 2003, which is 49.1% of the expenditure spent by consumers on retail. Notwithstanding the growth of out-of-centre and online retailing, the high street’s share of all retail spending is only fractionally down on its 50.8% market share of 10 years ago. This is primarily because the convenience goods retailers have born the brunt of the migration of shoppers to out-of-centre locations and not the high street.

3.13 Deflation has become a major issue for retailers on the high street and over the last five years there has been deflation of 0.7% in comparison to average annual inflation selling prices of 2.4% in the period 1993 – 1998. Several factors have contributed to deflation, including aggressive price competition from out of town retailers as well as the influx of significantly lower cost retail models (Primark, etc) that are able to challenge established high street retailers such as Marks & Spencer, Boots and Woolworths.

3.14 The High Street has also become a higher cost location with a previous shortage of units in prime locations having put upward pressure on already high rents and distribution / servicing costs.

3.15 However, despite these difficulties, many high street retailers are thriving and perhaps the most encouraging indicator of the long-term health of the high street is the strong pipeline of new town centre developments in the North West. As planning consent for out of town sites has become harder to gain, developers have switched their attentions back to town centres, reflected in the ongoing redevelopment of Altrincham and Urmston town centres in Trafford Borough and in competing centres such as Warrington, Bury and Macclesfield.
3.16 In addition, whilst larger centres initially increased their market share at the expense of smaller centres, given the extent of the retail development pipeline in the North West, developers are now beginning to increasing look at smaller centres for redevelopment opportunities, such as Gorton and Openshaw in East Manchester for example.

**Number of Shops Units**

3.17 Given the growth of multiple traders and increased competition between companies, national retail trends indicate a continued contraction in the number of shop units as the larger companies require larger shop units.

3.18 As a consequence of market demand and expectation, shopping centres and out-of-centre development that have been able to accommodate this demand for larger sized units (typically 500 - 2,000 m² or larger) have grown in importance. This has reinforced the trend of higher order centres and out-of-centre retailing growing in relative importance to smaller more constrained centres, precipitating increased polarisation in the retail hierarchy.

3.19 The growth in the size of stores has caused a contraction in the number of shop units and consumer choice. This is particularly evident in the food sector, with a marked decline in the number of smaller and more specialist food retailers (grocers, butchers, fishmongers, bakers etc), and a large increase of superstores.

3.20 This gravitation towards larger units is placing increased pressure, particularly on town centres, to adequately accommodate retailer demands in light of historical constraints (e.g. conservation areas) and the desire for local shoppers to have both mainstream and smaller independent retailers present within their local town centre.

**The Shopping Experience**

3.21 Due to increased affluence and mobility and the rise of the internet, the shopping experience is not as functional as it may have historically been (particularly in the non-food sector) and shoppers no longer shop merely to satisfy needs. Retailing in higher-order centres and the more attractive smaller centres is changing / evolving into a quasi-leisure experience. With spending on leisure activities continuing to outstrip that of retail, quality restaurants, coffee shops, cafes and bars as well as leisure facilities such as multiplexes are therefore important in attracting shoppers and encouraging longer dwell times within centres. Pedestrianised streets, shopping malls and other covered retail areas are also
important in attracting shoppers, as is the overall attractiveness of the town centre, along with good accessibility and car parking. All of these factors are directly relevant to the main town centres within the Borough where the catchment demographics (generally mobile, cash and time rich, able to exercise choice etc.) suggest that particular emphasis will be placed on these elements.

**Convenience Retail Market**

3.22 A noticeable by-product of the PPS6 restriction on the development of new, large foodstores has been the growth in planning applications to extend existing stores and the changing composition of floorspace within existing foodstores. There is an increasing emphasis on the sale of higher value, less space intensive comparison goods (particularly electrical goods) at the expense of convenience goods, reflected in the significant expenditure growth rates for comparison goods (c. 3.6% per annum for comparison goods and 4.2% for bulky comparison goods according to **Experian**) in comparison to much lower growth rates for convenience goods (c. 0.7%).

3.23 This trend alone poses an increasing threat to smaller centres, as larger foodstores significantly increase their market shares given their potential to sell an increasing wider product range of day-to-day convenience and comparison goods and services. This is reflected in the total store numbers in the United Kingdom (UK) having declined by c. 11% over the last 10 years.

3.24 Whilst this masks variations in the decline of different types of stores, given the emergence of superstores during the late 1980’s and early 1990’s, it is widely accepted that there has been a polarisation of retail facilities into the larger centres, resulting in the decline of smaller and more specialist food retailers. This trend is likely to continue and impact further on smaller district and local centres.

3.25 This decline in smaller and more traditional / specialist food retailers (e.g. butchers, fishmongers etc.) have also been compounded by the significant growth in smaller mini-convenience store formats such as **Sainsbury’s Local**, **Tesco Express**, which are underpinning traditional high street and suburban shopping parades. However, notwithstanding this significant growth in mini convenience store formats, there has been a considerable increase, particularly in affluent areas, in the patronage of independent / niche food retailers.
3.26 Another particularly significant development in the food retail market over the past few years has been the continued expansion of higher quality food retailers such as M&S Simply Food and in particular, Waitrose, which is now expanding into the regional markets.

3.27 Notwithstanding the growth in ‘niche’ higher quality retailers, competition from continental discount operators such as Aldi, Lidl and Netto remains strong despite saturation at the lower end of the convenience market, highlighted by the ongoing financial and operational difficulties at Kwik Save, the closure of which would have significant implications for the retail sector with c. 200 stores potentially becoming available to alternative A1 retail operators.

3.28 Finally, another recent development in the convenience retail sector has been the development of ‘forecourt’ convenience retailing within petrol stations. Whilst the link-up outlets, such as Esso – Tesco Express, have relatively small trading areas (c. 200 m²), they are open for long hours and potentially impact further on the viability of smaller, localised retail provision, particularly in relation to top-up food shopping patterns.

Non-Food Retail Market

3.29 The most significant change in non-food retailing over the last few years has been the increasing proportion of non-food sales accounted for by larger supermarkets, which have boosted their non-food market share notably. The development of larger format-stores and increased allocation of floorspace dedicated to non-food sales has allowed the major national convenience retailers such as Asda significantly increase the range of goods that they offer.

3.30 Indeed, notwithstanding this expansion in non-food retailing floorspace within existing store formats, Tesco and Asda in particular have began to operate smaller standalone stores dedicated to non-food product lines (such as the Asda ‘Living’ store at Altrincham Retail Park).

3.31 In addition to the significant expansion of convenience retailers into the non-food retail market, the main market trend in the non-food sector has been towards polarisation in terms of the growth of both the ‘value sector’ (operators such as Primark, New Look and Wilkinson’s) and also the niche specialists (such as Monsoon and Zara) who target distinct customer segments and seek to capitalise on customers growing demands for individuality. Given the growth in the value and higher order niche retailers, the middle market retailers (e.g. Marks & Spencer, Next etc.) are facing a challenging retail climate, being squeezed on price by the value sector and on service / quality by higher order niche retailers.
3.32 The short term impact of this polarisation within the non-food retail sector is that (according to Verdict Research) in recent years there has been a proportionately higher level of high street closures given that high street discounting cannot match out-of-town / online outlets given increasing high street operation costs (rent etc.) and the lack of floorspace to present full retail product lines.

**Out-of-Town Retailing**

3.33 Increased mobility and affluence has favoured larger centres which increased in size and importance relative to smaller centres. However, notwithstanding the increased attraction of larger centres, increased mobility and affluence has also stimulated out-of-centre development, which has grown much more rapidly than town centre development over the last 20 years.

3.34 Whilst this trend in favour of out-of-town retail development is beginning to reverse given the restrictive town centres ‘first’ approach advocated by PPG/S 6, Verdict still expect sales at out-of-centre locations to increase at a faster rate than at in-centre locations.

3.35 This is reflected in the fact that whilst retail sales as a whole have increased by 62.1%, sales from out-of-town stores grew nearly twice as fast at 118% over the past ten years. Out-of-town retail parks have provided retailers with larger, lower cost retail units than in town centre locations and they have used this opportunity to broaden their product offer and drive down prices. It has been a ‘winning’ formula not just for the grocers’ superstores and bulky goods operators, who have replaced lower value, space-intensive goods with higher value, space efficient electrical goods, but also, if carefully applied, for a growing number of high street retailers.

3.36 In terms of individual sectors, Verdict expect DIY to be the fastest growing out-of-town (out of town) sector, with sales expected to grow by up to 39.2% over the next five years. Clothing and footwear will be the second fastest growing out of town sector as retailers take up more units on shopping parks to take advantage of more spacious and bespoke accommodation. General merchandise retailers are also predicted to grow strongly (35.4% over the next five years according to Verdict) whilst electrical retailers are expected to grow by 35.3%, driven by the demand for new technologies such as LCD TVs and home entertainment systems.

3.37 With respect to grocers’ out of town sales, Verdict predicts that sales will grow more slowly than other sectors but that it will remain the largest retail sector, accounting for c. 65.5% of all out of town sales. This rate of growth is much faster than the 15.4% growth expected in
spending on food due to the increasing quantity of large-scale out-of-centre stores dedicated to non-food retail products.

**Non-Store Trading**

3.38 Home shopping (mail order and internet shopping) is the main component of non-store retailing, with non-store retailing presently amounting to c. 7% of comparison goods expenditure. Whilst mail order has a long history and has suffered to some extent from the rise of internet shopping, it has evolved and new retailers have entered the market and expanded, including retailers such as Next, Marks & Spencer and more recently John Lewis. These retailers expect home shopping to play an increasing, but supplementary, role to traditional store-based shopping.

3.39 However, with respect to ‘e-tailing’, growth has been phenomenal over the last few years, albeit from a very small base. Growth rates of c. 70% per annum were not unusual two years ago and whilst this growth has now come down to around 30% per annum, this represents a very strong growth rate compared to traditional forms of retailing.

3.40 It is estimated that about 5% of retail expenditure is now conducted on the internet, although most foodstore operators have closed their virtual stores or warehouses and operate home deliveries out of existing stores. It is apparent that traditional retailers focussing on books, games, DVDs and CDs along with finance, insurance and travel services have been most affected by e-tailing growth and it is highly likely that some alternative bulky and non-bulky comparison goods sectors such as toys and gifts, small electrical goods and some clothing and footwear could be significantly affected by future internet sales growth. This is reflected in Experian’s prediction that c. 12% of available comparison goods expenditure will be spent in non-store formats in the near future.

**Retail Sector Employment**

3.41 Over the last 20 years retail expenditure has increased at about 4% per annum, although retail employment has increased much more slowly. Total employees in employment have increased from 2.1 million to 2.9 million, an increase of 1.75% per annum. However, this growth has been in part time employees. Full time equivalent (FTE) employment has hardly increased at all, from about 2 million to 2.2 million, a 0.5% pa increase. Over the next 15 years Experian Business Strategies expect an overall decline in FTE employment with only a marginal increase in part time employment.
3.42 Within the North West, the number of people employed in retail is forecast to rise from c. 390,000 in 2007 to c. 413,000 in 2021 whilst in the Greater Manchester sub-region, the number of people employed is expected to rise from c. 142,000 in 2007 to c. 150,000 in 2021.  

Leisure Trends

3.43 The range of leisure choices now on offer has grown considerably within the last decade, driven by demographics, cyclical participation rates, consumer expectations and general market trends. This had led to an increase in competition within the leisure industry and it is evident that the pace of growth in the cinema and health & fitness market has been notably faster than other leisure sectors.

3.44 However, the main trend in the leisure market has been one of polarisation with leisure facilities being increasingly accommodated within bespoke developments served by larger catchments, to the detriment of smaller centres and operators.

i) Cinema

3.45 This polarisation in leisure offer has not been experienced more than within the cinema sector with significant closures of independent and suburban cinemas in response to the proliferation of out-of-centre complexes and the PPS6 fuelled expansion in smaller-scale town centre cinema schemes, such as the Denmark Street (Apollo Cinemas) multiplex development in Altrincham and the 5 screen (670 seat) Reel Cinema multiplex in Crewe town centre.

3.46 Expansion within the cinema sector is likely to slow over the next few years as more town centre ‘multiplex’ schemes (c. 6 – 8 screens) come on stream (e.g. Macclesfield town centre and Warrington Wireworks scheme) to complement the proliferation of out-of-centre developments.

ii) Health & Fitness

3.47 Along with the cinema sector, the pace of growth in the health and fitness market has been noticeably faster than other leisure sectors. Whilst previously the domain of the public sector, the 1990s experienced significant growth in the range of health and fitness clubs / facilities. This growth in private sector facilities is particularly reflected in the conclusions

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1 Greater Manchester Forecasting Modelling – no borough-wide data available
of Mintel’s report on the sector, which found that between 1998 and 2002, the value of the private health & fitness market had increased by 62% at current prices.

3.48 Whilst many operators (Virgin Active / David Lloyd) prefer out-of-centre locations on main arterial routes, increasingly smaller gyms are locating within town centres, particularly as part of wider mixed-use redevelopment schemes. This is in addition to strong investment by the Government and local council’s in public sports health / fitness facilities.

iii) Drinking and Eating

3.49 Research by Mintel indicates that in the period between 1998 – 2003, the ‘eating out’ market grew by some 25% with this growth being largely attributable to convenience for consumers, an increase in disposable income and the social aspect of eating out given that it is now less formal and more family orientated.

3.50 Whilst there remains significant growth in the fast-food market despite increasing lifestyle / health concerns, there has also been a significant increase in the number of national chain / themed restaurants such as La Tasca, Nando’s, Café Rouge and Pizza Express, which are often associated with successful and vibrant leisure sectors within town centres.

3.51 This rise in national chains is complemented by the rise in higher quality gastro-pub and niche restaurants, particularly in affluent and predominantly young professional orientated areas. The development of ‘food / restaurant’ destinations in some smaller centres can have a positive effect on the continuing viability of smaller centres (e.g. Hale, Didsbury and Chorlton), although careful management of the evening economy is required so that residential amenity is not impacted upon. This is particularly pertinent to takeaway uses.

3.52 In addition to the growth in the restaurant sector, there has been significant growth in the number of coffee shops and sandwich bars on the high street to complement existing chain bakeries such as Hampson’s and Gregg’s, with the latest ‘wave’ of growth being particularly focused on health foods and deli style outlets, which can be accommodated in a wide range of centres.

3.53 Finally, with respect to the drinks market, whilst the impacts of the national smoking ban will be unknown for several months, it is clear that the recent trend has been towards more café-bar style outlets, although growth in this sector is slowing due to cheaper alcohol offers from the main convenience store operators. Only mass discount operators such as Weatherspoon’s are continuing to proceed with expansion at this time.
4. SUB-REGIONAL CONTEXT

4.1 This section examines the regional context within which Trafford and its town centres operate. Given that Trafford sits within a dynamic catchment and does not function in isolation, it is proper to consider the competing attraction of other centres within the sub-region, particularly those centres which the household telephone survey results shows are the main beneficiary of expenditure leakage out of the catchment.

4.2 It is also important to identify planned quantitative and qualitative improvements in competing centres. Significant planned improvements to Stockport, Macclesfield and Warrington town centres, for example could easily impact on Trafford’s principal town centres, as could any improvements to out-of-centre retail parks within the sub-region, including The Trafford Centre.

4.3 On the basis of our previous experience and the household telephone survey, the following centres are identified as competing or having a direct relationship with the town centres within Trafford and its catchment:

- **Manchester** – City Centre and suburban district centres, including Wythenshawe and Chorlton;

- **Stockport, Warrington & Macclesfield** – Town Centre redevelopment;

- **Salford** – Salford City Reds new rugby stadium (with ancillary retail development);

- **Trafford Centre** – Barton Square development (presently under construction);

- **Out-of-Centre Retail Parks** – Handforth Dean (A34 Corridor) and Cheadle Royal; and

- **North Cheshire Towns** – Knutsford and Northwich

4.4 A plan of Trafford within this wider context (including existing convenience provision) is included at Appendix 2, and an overview of each is undertaken below.

**Manchester**

**City Centre**

4.5 Since the mid 1990’s, retail development within Manchester City Centre has been dominated by the New Cathedral Street development and the redevelopment of the Arndale Centre, including the northern extension which opened last year. By virtue of
these developments, the city’s retail offer has improved significantly in quantitative and qualitative terms reflecting its regional status with higher order national retailers such as Selfridges and Harvey Nichols located within the city centre.

4.6 Major recent additions to the city centre offer includes the Danish furniture retailer ilva at the Piccadilly Basin development and the Spinningfields development off Deansgate, which will provide c. 40,000 m$^2$ of potential retail and leisure floorspace, including a new flagship Armani store, which will form the nucleus of a concentrated cluster of international ‘high fashion’ outlets, complemented by a strong food and drink offer.

4.7 In terms of the wider city centre development pipeline, the majority of the retail and floorspace being brought forward is predominantly ancillary to commercial and residential led mixed-use developments.

4.8 With respect to leisure provision, the city centre is very well catered for reflecting its regional status. The main leisure proposal of potential sub-regional significance is the prospect of the UK’s first super-casino in East Manchester, which was awarded to the city by the Government in early 2007. However, there is significant uncertainty at this time as to whether the super-casino project will be brought forward given the formal parliamentary review which is presently being progressed.

Wythenshawe

4.9 Wythenshawe is a post-war purpose built district centre to the south of Manchester with a relatively poor convenience and comparison retail offer, reflected in the present flows of expenditure to Stockport and Altrincham.

4.10 The district centre lacks a modern quality main foodstore as well as quality national comparison retailers and it is understood that Asda has recently committed to developing a store in the town centre. This is supported by the Wythenshawe Town Centre Masterplan, which sets out the 10 year framework for regeneration of the district centre proposes, is proposing considerable investment in developing and enhancing retail and leisure facilities.

Chorlton

4.11 Chorlton is the only District Centre in the west of Manchester and is located c. 2 miles to the east of Stretford along Edge Lane / Wilbraham Road. The district centre, which accommodates a free-standing medium sized Morrison’s foodstore, has a strong independent retail offer with several small niche convenience and comparison shops. Chorlton also has a good evening economy with numerous bars and popular restaurants.
4.12 With respect to future development opportunities, proposals to redevelop and extend the Precinct Shopping Centre have long been promoted and may come forward during the LDF period.

**Manchester - Out-of-Centre Retail / Leisure Parks**

4.13 The household telephone survey results highlight, leakage of expenditure from the Timperley area to the large out-of-centre Tesco Extra and Baguley (Brookway) Retail Park development on Altrincham Road, which is anchored by retailers such as Wickes, Matalan and JJB Sports.

**Stockport**

4.14 In light of recent developments and increasing competitive retail pressures from Manchester City Centre and the Trafford Centre, the Council has progressed plans for the retail-led development of the Bridgefield Street area, to provide a town centre extension of circa 95,000 m$^2$ (gross) of predominantly comparison retail floorspace. The retail offer will be complemented by several leisure uses, including a health and fitness centre and potentially a new cinema complex.

4.15 The Masterplan has been formally progressed through the allocation of the Central Shopping Area for retail purposes in Stockport’s adopted UDP (May 2006). The Plan envisages that the Bridgefield Street scheme will be anchored by two large department stores at opposite ends of a re-established town centre retail circuit. It is understood that one of the department store anchors will be a potentially enlarged and enhanced Debenhams store.

4.16 The detailed design of the scheme is presently ongoing, and the Council has recently signed a development agreement with Lend Lease to bring forward the retail element of the overall Town Centre Masterplan.

4.17 Clearly, the quantum of development proposed will significantly improve the existing town centre in quantitative and qualitative terms as well as reinforcing its position within the sub-regional retail hierarchy

**Macclesfield**

4.18 Macclesfield is presently the subject of significant ongoing town centre redevelopment proposals with the Council having recently selected Wilson Bowden as its preferred
developer. It is understood that the developer is currently working up the scheme design and the Council expects a planning application to be submitted in late 2007 in advance of development commencing in 2009.

4.19 Initial proposals comprise c. 40,500 m$^2$ (gross) of retail floorspace including an Asda store of c. 8,000 m$^2$ (gross). In addition, a department store totalling c. 7,500 m$^2$ (gross) floorspace will anchor the town centre regeneration scheme, complemented by an additional 50 retail units and an 8 screen town centre multiplex. It is understood that the preferred developers have been in discussion with several national retail operators such as Marks & Spencer, Debenhams and Waitrose, in addition to leisure operators, the major cinema companies and national restaurant chains.

**Warrington**

4.20 Warrington is located c. 10 miles to the west of Altrincham beyond the Manchester Ship Canal. The household telephone survey results show that Altrincham town centre draws a level of expenditure from the residential areas to the east of Warrington (e.g. Lymm). Any significant quantitative and qualitative improvement to the retail and leisure offer in Warrington town centre therefore has the potential to reverse these flows and impact on Altrincham market shares.

4.21 In terms of recent town centre developments, an extension to the Golden Square shopping centre (c. 33,500 m$^2$ gross) opened in May 2007. The centre is anchored by a Debenhams department store (c. 10,000 m$^2$) and also accommodates a large number of high street retailers, all of which will qualitatively improve Warrington’s retail offer.

4.22 With respect to forward development pipeline, a proposed c. 6,000 m$^2$ retail extension to the New Times Square shopping centre has recently been refused subsequent to call in Inquiry. However, another scheme - The Wireworks scheme north of the town centre (opposite Warrington Central station) has recently been approved post call in Inquiry. This application proposes the mixed-use development of c. 6,000 m$^2$ of retail development, an 8 screen multiplex cinema, a hotel and offices / residential uses. This scheme will significantly enhance Warrington’s family leisure / evening economy offer.

4.23 The Warrington Retail and Leisure Study, commissioned to inform the Warrington LDF process, recommends that no allocations should be made in the LDF for new convenience floorspace in the Borough and that the Council should adopt a cautious approach to new comparison floorspace allocations given the Wireworks and New Times Square town centre schemes coming forward.
Salford – City Reds Stadium

4.24 A public inquiry into the development of a new 20,000 capacity stadium for the Salford City Reds Rugby Football team was held in July 2006 and was subsequently referred to the Secretary of State (SoS) for determination in November 2006. Planning permission was subsequently granted with one of the main issues relating to the proposed hotel, gym and free-standing non-food bulk retail development of c. 21,500 m$^2$ of new floorspace. Whilst the location is out of centre, the proposed retail / commercial floorspace was supported as ‘stadium enabling’ development.

4.25 In determining the retail element of the application, the SoS concluded that there was no strong quantitative or qualitative need for the retail development proposed and that there would be some adverse impact 5.25% trade diversion on Urmston and Eccles, as the closest town centres to the application site. However, the decision considered that Urmston would be able to absorb the impact and that the Ask town centre redevelopment would not be prejudiced by the stadium enabling retail development.

Salford – Town Centre Developments

4.26 On the basis of initial discussions with the City Council, it is understood that confidential discussions are ongoing with developers to bring forward a ‘sizeable’ non-food extension to the existing Salford City shopping precinct as well as the development of a new foodstore in Pendleton, to which a site is formally allocated in the adopted UDP. Whilst there are no further details available at this stage, it is clear that the proposals are seeking to draw back expenditure presently being lost to competing centres.

The Trafford Centre

4.27 The Trafford Centre comprises a freestanding regional shopping centre of 130,000 m$^2$ of retail floorspace with the key anchor tenants being Debenhams, M&S, Selfridges and John Lewis. The centre is identified by research group CACI as the fifth ranked regional shopping mall in the UK behind the Metro Centre (North East), Bluewater (South East), Merry Hill (Midlands) and Meadowhall (South Yorkshire). The centre opened for trading in 1998 and has established itself as one of the principal regional retail destinations.

4.28 In addition to the high order retail offer, the centre is a leisure destination with a cinema complex, bowling alley and the recent ‘Great Hall’ development which accommodates a significant number of high quality, family orientated restaurants and bars.
The Trafford Centre Area

4.29 In addition to the large standalone retail units occupied by Asda, B&Q Warehouse and Costco which surround The Trafford Centre, construction of the new c. 18,600 m$^2$ Barton Square development is presently ongoing. The new development, which will be linked by a glazed walkway and finished in the same architectural style as The Trafford Centre, is ongoing and scheduled to open in 2008. The scheme is primarily focussed on high quality homeware retailing with the likes of Habitat and Marks & Spencer (Homeware) signed up as prospective tenants.

4.30 The role of The Trafford Centre as a major leisure destination will be strengthened in 2008 with the opening of the Chill Factor ‘E’ snow-sports development on the Regional Sports site adjacent to the existing JJB Soccerdome.

Out-of-Centre Retail Parks

4.31 The out-of-centre retail parks at Handforth Dean and Cheadle Royal have been trading for some time and are readily accessible, particularly from the southern parts of Trafford borough. Cheadle Royal provides a large John Lewis department store and a full range Sainsbury’s foodstore, alongside a David Lloyd Leisure Club, several family orientated restaurants and a hotel.

4.32 Two miles to the south of Cheadle Royal on the A34 Wilmslow bypass is Handforth Dean Retail Park, which accommodates several national retailers including a large Marks & Spencer, BHS Home Store and also a large Tesco superstore.

North Cheshire

4.33 Given that the household survey results reveal that Altrincham presently draws expenditure from North Cheshire and particularly around the Knutsford, Lymm and Northwich areas, it is important to understand the recommendations of the Cheshire Retail Study in terms of the assessed future need in the study area to 2021 and how this may be interpreted within individual local authorities respective Local Development Frameworks (LDFs).

4.34 In headline terms, the study identifies significant capacity for new convenience and comparison floorspace in period to 2021 for both Macclesfield and Northwich, which is likely to be consumed by the large town centre redevelopment schemes being progressed
at present. With respect to Knutsford, limited expenditure capacity is identified to support additional convenience and comparison retail floorspace in the period to 2011, although capacity is identified for a modest extension in comparison retail development by 2021 on the basis of expenditure growth.

**Leisure**

4.35 The study identified that Macclesfield had capacity for nine cinema screens immediately and 14 screens by 2021, Northwich for six screens and nine screens respectively in the same period whilst capacity was identified for seven screens and eleven screens in Knutsford by 2021, although the study advised that demand would be better served in the higher order centres of Northwich and Macclesfield.

4.36 In addition to identifying cinema capacity, the study identifies capacity for three additional health and fitness centres in Northwich over the period to 2021 with Macclesfield having identified capacity for one additional club in the same period.
5. TRAFFORD – RETAIL AND LEISURE CONTEXT

5.1 Trafford is one of ten authorities that make up the Greater Manchester conurbation. The Borough extends south of the Manchester Ship Canal through Urmston, Old Trafford and Stretford; it then straddles the M60 orbital motorway and Mersey Valley before running south through Sale to Altrincham, Hale and Bowden and the edge of the north Cheshire Green Belt.

5.2 This broad geographical arrangement introduces significant contrasts in character and demographics. The northern part of the borough, centred on Trafford Park and Old Trafford / Stretford is more urban in nature, with physical remnants of its former industrial and employment character. In social terms this part of the Borough generally displays greater signs of deprivation, social need, lower incomes and general poorer performance against key social indices.

5.3 Beyond the M60 motorway to the west of Stretford is the town of Urmston, to the west of which, beyond the ship canal, are the predominantly suburban settlements of Flixton and Davyhulme. Running south of Urmston beyond the River Mersey is the large industrial complex at Carrington.

5.4 Moving further south along the Manchester Ship Canal corridor is the township of Partington, which grew in the immediate post war period as an overspill settlement for the Manchester Corporation. Partington is relatively detached settlement on the western side of the borough, separated from Altrincham and Sale by a significant swathe of Green Belt.

5.5 The southern part of the Borough is more residential in character, supporting areas of public realm and open space, and in parts areas of significant wealth. House prices in large parts of the south (Hale, Hale Barns and Bowdon) are amongst the highest in the region.

5.6 The main town centres in the south of the Borough (Altrincham and Sale) are detached from Stretford and Urmston by the M60 orbital motorway, which runs east to west. The other principal lines of communication within the Borough run primarily north to south, comprising the A56 (Chester Road), the Metrolink tram system and the Bridgewater Canal, which runs to the north of Altrincham through Sale and Stretford to Manchester City Centre.
5.7 The Borough supports four main town centres (Altrincham, Sale, Stretford and Urmston); three district centres (Hale, Sale Moor and Timperley) and fourteen local centres. A key element of retail provision within the Borough is The Trafford Centre, a freestanding out of town shopping centre serving a regional catchment. The role and function of each centre is set out below.

1) Town Centres

5.8 The four main town centres identified in the adopted UDP are significantly different in terms of their origins, historical growth, present retail offer and future development.

Altrincham

5.9 Altrincham town centre is located to the south of the Borough and is identified in the emerging replacement Regional Spatial Strategy (RSS) as one of 24 sub-regional centres (alongside Stockport, Macclesfield and Warrington) in the North West region where comparison retailing facilities should be enhanced and encouraged to ensure the equitable distribution of high-quality retail and leisure facilities outside of the regional centres.

5.10 Altrincham is presently subject to significant redevelopment proposals that will enable the town to compete more effectively within the Greater Manchester sub-regional retail hierarchy and also with The Trafford Centre, as well as providing a town centre offer better aligned to and capable of meeting the needs of its affluent catchment area.

5.11 The primary retail area of the town centre is focussed along Stamford New Road and George Street; the main provision comprises the 1970s Stamford Square shopping arcade (c. 25,000 m²), which is presently the subject to an extensive redevelopment programme to create additional modern retail floorspace of c. 7,800 m² (gross). Whilst this development has involved the closure of several units to allow for the ongoing redevelopment works, larger units have been created to accommodate national high street retailers such as Debenhams (Desire concept) and Next, which will significantly improve the quality and attraction of Altrincham’s retail offer as well as physically improving the local shopping environment.

5.12 Recent substantial development has taken place in the east and north of the town centre, with the large Tesco Extra being complemented by the new Denmark Street leisure development, which comprises a six screen ‘multiplex’ cinema, national chain restaurants as well as a new private gym has made a significant contribution to diversifying Altrincham’s town leisure and night-time economy offer.
5.13 In addition to new development, given the historic nature of Altrincham town centre, which is surrounded by conservation area designations, there has been considerable investment in refurbishing the historic market hall and sympathetically redeveloping Altrincham Town Hall for a mix of uses including apartments, offices and community facilities.

5.14 In terms of forward development pipeline, Trafford Council is close to signing a development agreement with Nikal / David McLean to bring forward the Altair scheme on Oakfield Road. This mixed-use development, to which a planning application is likely to be submitted in winter 2007, presently proposes to accommodate c. 13,000 m² of ‘lifestyle’ retailing and leisure, a new ice arena in addition to new offices, residential units and a hotel.

**Sale**

5.15 The town of Sale lies about five miles south west of the city of Manchester and two miles to the north of Altrincham on the main A56 route to Chester. The centre acts as a retail and service centre for a predominantly local catchment (Ashton-upon-Mersey, Sale West, Brooklands and Sale Moor). The centre provides a strong convenience offer with medium sized Tesco, Sainsbury’s and M&S Simply Food stores all having good physical linkages with the primary shopping area. There is also planning permission, as yet unimplemented, for a new Aldi store in the centre, (LPA ref: H/62827).

5.16 Whilst significant improvement in qualitative terms has been made recently with the redevelopment of The Square Shopping Centre, Sale’s comparison retail offer remains limited with the absence of several higher order national retailers from the town centre. However, there are several popular independent retailers who add to the town centre retail offer.

5.17 Sale’s leisure offer is predominantly pub based, recently strengthened by the development of new bars / restaurants at Sale Waterside. Family orientated leisure is limited although in terms of leisure / health and fitness facilities, Sale is relatively well provided for with a large public Leisure Centre as well as private facilities such as the LA Fitness centre on the A56.

5.18 With respect to wider town centre uses, the Sale Waterside development is the cultural and administrative focus of the town with the Theatre, Art Gallery, Library all interlinked through recent redevelopment of the area around the Town Hall.
Stretford

5.19 Stretford town centre comprises the 1960s purpose-built Mall (previously Arndale Centre), prominently located on the A56 Chester Road. There are a number of linked town centre uses such as the library and health centre which are separate from the main Mall shopping area. The town serves a mixed catchment of residential areas in the north of the Borough, including Gorse Hill, Old Trafford, Lostock and the wider Stretford area.

5.20 In terms of retail provision, the Mall provides relatively modern indoor retail floorspace, accommodating several national comparison goods retailers such as Woolworth’s, WH Smith and Argos, as well as several independent retailers and an indoor market. This is in addition to a medium sized Tesco Metro, which forms the primary town convenience offer in the centre, complemented by an Iceland store, a number of discounter style operators (e.g. Quality Save) and more localised convenience shops. The Mall accommodates a range of local services (e.g. banks) although leisure provision is limited to a public house and a snooker hall.

5.21 Planning permission (as yet unimplemented) exists for a minor extension to the Mall (LPA ref: H/62230) as well as environmental improvement works, which will improve the physical environment significantly.

5.22 In terms of wider retail commitments in Stretford, full planning permission remains extant for the out-of-centre development of a c. 4,500 m² (gross) Tesco foodstore adjacent to Stretford Leisure Centre (LPA ref: H/56481), located 1.5 miles north up Chester Road towards Old Trafford. A subsequent application (LPA ref: H/64063) to extend the permitted size of the supermarket to 8,184 m² (gross) was refused at appeal (November 2006) on the basis of issues relating to retail impact, sequential compliance and disaggregation, although the quantitative need for the development was accepted by all the main parties at Inquiry.

Urmston

5.23 Urmston is the closest of Trafford’s town centres to The Trafford Centre. Located to the west of the Borough, Urmston is a commuter town benefiting from good rail access to Manchester City Centre and Warrington / Birchwood. The town centre currently serves a predominantly local catchment, meeting mainly weekly and top-up shopping needs, with a modest comparison goods retail offer compared to the other main town centres within Trafford.
5.24 However, the profile and performance of Urmston is likely to significant change in the near future with the forthcoming mixed-use redevelopment of the existing 1960’s shopping centre (LPA ref: H/OUT/64770). The town centre scheme, which is shortly to be brought forward by Ask Developments, is to be anchored by a medium sized Sainsbury’s store (c. 4,500 m$^2$ gross) and includes c. 9,000 m$^2$ of new retail floorspace (Class A1 – A4), an improved public library, community facilities and c. 140 residential units.

5.25 This town centre redevelopment scheme will significantly improve Urmston’s retail offer both quantitatively and qualitatively, enabling the town to claw-back expenditure presently flowing to competing centres, particularly with respect to convenience and non-bulky comparison goods. The development will also provide new floorspace for new restaurants and cafe bars in order to diversify the town centre offer.

5.26 This potential improvement in Urmston’s position within the sub-regional retail hierarchy is reflected in a recent independent CACI report, commissioned by Ask Developments, which concludes that Urmston will climb from 785$^{th}$ to 335$^{th}$ place in CACI’s national retail ranking of centres on the basis of retail footprint increase. The report highlights Urmston’s potential to attract a wider catchment through its enhanced retail provision.

2) District Centres

5.27 The adopted Trafford UDP identifies three district centres of Hale, Sale Moor and Timperley, which meet localised day-to-day needs and whose retail composition largely reflects the PPS6 definition of a district centre in terms of containing at least one convenience store as well as a range of non-retail services. The three district centres play a complementary role to the main town centres in the Borough and their future prospects for change will be considered in more detail in the area-specific assessments later in this report.

Hale

5.28 Located to the south west of Altrincham, Hale is an attractive but tightly constrained ‘linear’ centre comprising primarily high quality independent convenience and comparison ‘niche’ retailers, as well as several quality restaurants, bars and ‘deli style’ coffee shops, reflective of its particularly affluent catchment area.

5.29 In addition to an existing Somerfield store, a new Tesco Express store has recently opened on Ashley Road and this will improve the District Centre’s convenience offer in qualitative terms of it as a day-to-day top-up food destination. This new small-scale foodstore has
been complemented by the recent opening of a new organic foodstore (As Nature Intended) on the site of the former Iceland store.

Sale Moor

5.30 Sale Moor is a small district centre located c. 1.5 miles to the south west of Sale town centre at the junction of Northenden Road and Marsland Road. Serving a relatively small catchment area, the district centre is predominantly used for small-scale top-up shopping, reflected in the small Spar store and numerous local independent convenience and comparison retailers. Several restaurants and takeaways complement the retail offer.

Timperley

5.31 Timperley is to the east of the Borough and retail provision is focussed along Stockport Road. Anchored by relatively small Co-Op and Iceland stores, the centre comprises small independent retail outlets. The centre also has a library as well as a range of local services.

3) Local Centres

5.32 The adopted Trafford UDP defines local shopping centres as containing ten or more Class A1 retail units, generally including small-scale convenience retail provision such as a grocers and butchers.

5.33 Whilst 14 local centres are identified in the adopted UDP, the main centre of particular interest in respect to this study is Partington, to which future redevelopment of the local centre is to be brought forward through an Area Action Plan (AAP). Detailed consideration of the potential for future change in Partington is given in a separate area-specific assessment later in this report. This is in addition to an assessment of the potential to create a new local centre in Broadheath.

Partington

5.34 Whilst Partington is defined as a local centre in the adopted revised UDP, one of the terms of reference for this study is to assess the quantitative and qualitative need for additional retail development in the centre, which in turn will inform the Partington Area Action Plan (AAP).
5.35 Partington is identified by the Council as in need of regeneration and it is clear that the notwithstanding the significant investment in public services (nursery, healthy living centre), the 1960’s local shopping centre is not appropriate for modern retail needs, reflecting in significant vacancies and a poor physical environment.

5.36 In terms of retail provision, there is a small Co-Op store located to the rear of the local centre and this is complemented by some local independent shops (grocers, hardware store), services and a small local market.

5.37 However, the existing vacancies within the local shopping centre may be partly explained by the full planning permission (LPA ref: H/56035) which exists to demolish and redevelop the existing shopping centre to provide new retail facilities of c. 2,800 m$^2$ (gross) floorspace. Whilst this much needed redevelopment has not come forward to date, it is understood that the shopping centre owners are seeking alternative plans to redevelop the shopping centre as part of a wider mixed-use redevelopment.

4) Neighbourhood Centres

5.38 The adopted revised UDP defines Neighbourhood Centres as those consisting of five or more adjacent or closely related shops, the majority of which are Class A1 retail use or are vacant at the time of survey. A significant number of centres have been identified but are not the subject of appraisal in the context of this study.

5) Out-of-Centre Retail Parks

5.39 The Borough has a wide geographical spread of out-of-centre retail / leisure park provision with Altrincham (Broadheath) Retail Park serving the Altrincham and Sale catchments, White City Retail Park (Old Trafford) serving the north of the borough and the Trafford Retail Park (Urmston) serving the west of the borough. There are also several standalone retail / leisure outlets across the borough such as the PC World on A56 Chester Road.

Altrincham Retail Park (Broadheath)

5.40 The household telephone survey results identify Altrincham Retail Park as a popular retail park destination. The Retail Park, which is conveniently located just to the north west of Altrincham town centre (c. 0.5 miles) on the main A56 corridor, opened in 1996 and comprises c. 17,000 m$^2$ (gross) of unrestricted retail floorspace, made up of a mix of non-bulky (high street) and bulky comparison goods retail anchors such as Argos, JJB Sports, Carpetright, Currys and Homebase DIY. This has more recently been complemented by a
new c. 3,000 m² Asda Living outlet (opened April 2005), which is one of the few trading
general non-food concept stores operated by Asda.

5.41 Adjacent to the retail park is the bulky-goods Atlantic Street retail park which is anchored
by a c. 6,000 m² B&Q (including MFI).

**White City Retail Park (Old Trafford)**

5.42 Having opened in 1990, White City is an older generation retail park which is occupied by
traditional bulky goods retail warehouse operators such as Homebase, Halfords and
Currys as well as several furniture operators. Recently the development of a vacant site
on the opposite side of Chester Road has opened and accommodates DFS and
Sleepmasters (furniture retailers) to further increase the bulky goods retail presence in the
locality. A single PC World retail unit is also located close by along Chester Road.

**Trafford Retail Park (Urmston)**

5.43 Trafford Retail Park, which is located just to the west of The Trafford Centre beyond
junction 10 of the M60, opened in 1997 and presently comprises 12 retail units.
Specifically brought forward as a bulky goods retail park (with some exceptions), anchor
retailers include Comet and Allied Carpets.

5.44 Planning permission exists for the development of an additional c. 5,300 m² non-food retail
warehousing with a further outline application for another c. 2,500 m² retail unit presently
remaining undetermined by the Council.

**The Trafford Centre**

5.45 As set out previously, The Trafford Centre comprises c. 130,000 m² (gross) of retail
floorspace, anchored by major department stores including (amongst others) Selfridges,
John Lewis and Debenhams. This is addition to numerous mainstream and higher order
fashion and high street national multiples. The centre, which is set out within an indoor
mall arrangement, is supported by unlimited free parking and direct access from the M60
motorway. The Trafford Centre draws shoppers from across the region and is a major
destination within Trafford Borough. Since opening in September 1998 it has had a
significant impact on non-bulky comparison goods expenditure patterns in both the
Borough and the wider sub-region. It has evolved into a tourist and leisure destination in
its own right given the substantial leisure (cinema / bowling alley) offer allied to an
improved food and drink provision focussed around the Great Hall.
The Trafford Centre Area

5.46 The retail offer within The Trafford Centre area is set to expand with the completion of the (c. 18,600 m$^2$) bulky goods (homeware) based Barton Square development, which is to be anchored by M&S (Homeware) and Habitat. Whilst Barton Square will be linked to The Trafford Centre by a glazed walkway and will be of the same architectural style, it is located in an out-of-centre location within the wider Trafford Centre area, as defined by the adopted UDP (June 2006).

5.47 In addition to The Trafford Centre and the associated Regional Sports Complex, there are several out-of-centre retail developments including a large Asda hypermarket (c. 13,600 m$^2$ gross), a Costco Retail Warehouse and a large B&Q Warehouse (c. 12,700 m$^2$ gross).

5.48 The Chill Factor ‘E’ snow sports development adjacent to the JJB Soccerdome will also consolidate The Trafford Centre and its surrounding area as a sub-regional leisure destination.
6. TOWN CENTRE HEALTH-CHECKS

6.1 A health-check exercise has been undertaken for the principal centres within Trafford, drawing on the performance indicators set out within PPS6. This review goes on to inform the wider retail need assessment, particularly highlighting the existing strengths and qualitative deficiencies in the main centres within the Borough:

- **Main Town Centres** – Altrincham, Sale, Stretford and Urmston;
- **District Centres** – Hale, Sale Moor and Timperley; and
- **Local Centre** – Partington.

6.2 Given that the Council has maintained and updated an extensive town centre survey database on an annual basis, we have updated the relevant surveys (July 2007) to highlight the changing retail composition of the main town, district and local town centres within the Borough since the previous retail study was completed in 2001.

**Altrincham**

**Diversity of Uses**

6.3 The 2001 Study identified a total floorspace within Altrincham of 120,977 m² contained within 452 units, which was derived from the Council survey of Altrincham town centre in 2000. The Council survey, which is based on the defined UDP town centre boundary, is considered to be more appropriate for retail analysis given that Experian Goad town centre reports focus on what Experian consider to be the main extent of the primary shopping area within a town centre.
Table 1 – Altrincham Town Centre Floorspace

<table>
<thead>
<tr>
<th>Retail Sector</th>
<th>2000 Floorspace (sq. m)</th>
<th>2007 Floorspace (sq. m)</th>
<th>Floorspace Change (2000 - 2007) (sq. m)</th>
<th>No. of Units 2000</th>
<th>No. of Units 2007</th>
<th>Unit Change 2000 – 2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience</td>
<td>9,676</td>
<td>17,293</td>
<td>+7,617</td>
<td>20</td>
<td>18</td>
<td>-2</td>
</tr>
<tr>
<td>Comparison</td>
<td>57,575</td>
<td>44,297</td>
<td>-13,278</td>
<td>186</td>
<td>145</td>
<td>-41</td>
</tr>
<tr>
<td>Service</td>
<td>34,873</td>
<td>42,083</td>
<td>+7,210</td>
<td>155</td>
<td>190</td>
<td>+35</td>
</tr>
<tr>
<td>Vacant</td>
<td>10,311</td>
<td>11,993</td>
<td>+1,682</td>
<td>70</td>
<td>76</td>
<td>+6</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>8,542</td>
<td>7,482</td>
<td>-1,060</td>
<td>21</td>
<td>10</td>
<td>-11</td>
</tr>
<tr>
<td>Total</td>
<td>120,977</td>
<td>123,148</td>
<td>+2,171</td>
<td>452</td>
<td>439</td>
<td>-13</td>
</tr>
</tbody>
</table>

Source: Trafford Council In-Centre Surveys (based on actual UDP defined town centre boundaries) (may not add up due to rounding)

6.4 As the table highlights, the floorspace composition within the defined town centre has significantly changed over the past six years since the previous retail study. The total floorspace of the town centre has marginally increased by 2,171 m² (gross) to 123,148 m² (gross) of floorspace.

6.5 However, whilst there has been an overall increase in floorspace, this masks significant changes in the town centre composition with Altrincham experiencing significant growth in convenience floorspace and a significant decrease in comparison goods retail floorspace.

6.6 Whilst the significant increase in convenience retail floorspace is directly attributable to the large freestanding Tesco Extra store (c. 8,836 m² gross) on Moss Lane, which opened in November 2002, the decrease in comparison goods floorspace is attributable to three factors.

6.7 Firstly, some of the significant decrease (c. 13,278 m² gross) is attributable to a re-measurement of the floorspace of individual units by Council Officers (in accordance with Experian Goad measurement conventions) in the Council’s annual surveys since the 2001 Study.

6.8 The significant change in the floorspace of certain units is highlighted for example by the changes in the floorspace of the Woolworths store, which was originally 1,951 m² (gross) in the 2000 Survey and which was subsequently re-measured by the Council to total 976 m² (gross) in the intervening period since the previous retail study was published in 2001.

Source: Trafford Council In-Centre Surveys (may not add up due to rounding). Chesterton’s 2001 Retail Study utilised the Council’s Town Centre Surveys from 2000 and this has been utilised for the purposes of comparison.
6.9 Secondly, some of the decrease in comparison goods floorspace and rise in the number of vacant units found in the 2007 town centre survey is attributable to the ongoing redevelopment of the Stamford Quarter, where c. 3,909 m$^2$ (gross) of prime retail floorspace is presently vacant and awaiting redevelopment (phase II demolition is presently ongoing). Once the redevelopment work is complete and the new additional comparison retail floorspace brought forward, we expect the quantum and proportion of comparison floorspace to rise towards 2000 survey levels.

6.10 Finally, given the significant increase in the quantum of service floorspace within Altrincham town centre, it is clear that some comparison floorspace has now been occupied by non-retail uses given that the number of comparison outlets in Altrincham, as a percentage of the overall number of town centre units, is significantly below (33.03%) the Goad national average of 46.85%.

**Unit Composition**

6.11 Whilst the floorspace within the town centre has increased since the 2001 Study, the total number of units has actually fallen, which may be reflective of the amalgamation of smaller units to reflect retailer requirements for larger floorplates, as opposed to closures due to the ongoing Stamford redevelopment.

**Table 2 – Altrincham Town Centre Composition**

<table>
<thead>
<tr>
<th>Units</th>
<th>Number</th>
<th>%</th>
<th>% GB Average</th>
<th>Quantum of Floorspace</th>
<th>%</th>
<th>% GB Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience</td>
<td>18</td>
<td>4.1</td>
<td>9.09</td>
<td>17,293</td>
<td>14.04</td>
<td>16.69</td>
</tr>
<tr>
<td>Comparison</td>
<td>145</td>
<td>33.03</td>
<td>46.85</td>
<td>44,297</td>
<td>35.97</td>
<td>52.32</td>
</tr>
<tr>
<td>Service</td>
<td>190</td>
<td>43.28</td>
<td>32.42</td>
<td>42,083</td>
<td>34.17</td>
<td>21.20</td>
</tr>
<tr>
<td>Vacant</td>
<td>76</td>
<td>17.31</td>
<td>10.29</td>
<td>11,993</td>
<td>9.71</td>
<td>8.63</td>
</tr>
<tr>
<td>Miscellaneous (excl. Vacant)</td>
<td>10</td>
<td>2.28</td>
<td>1.35</td>
<td>7,482</td>
<td>6.07</td>
<td>1.16</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>439</td>
<td></td>
<td></td>
<td><strong>123,148</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Based on Trafford Council Town Centre Survey (as updated) and Experian Goad In-Centre Reports. May not add up due to rounding.

6.12 As the table above shows, whilst the Tesco Extra has significantly increased the convenience floorspace within Altrincham town centre, it remains (14.04%) marginally
below the Goad national average (14.35%). This is in direct comparison to the 2000 survey which found that only 8% of the floorspace was for convenience retail in comparison to a national average of 14.35%.

6.13 With respect to the number of units as a proportion of the overall town centre accommodation, Altrincham is still significantly below (4.10%) the Goad national average (9.09%). The same figures in 2000 were 4.42% against a national average of 9.53%. The significant increase in the quantum of floorspace as an overall proportion of the town centre floorspace is attributable to the fact that Altrincham accommodates two very large supermarkets (Sainsbury’s and Tesco Extra) which total c. 15,000 m² (gross) of floorspace and which ‘skew’ the floorspace figures.

6.14 With respect to comparison retail provision, it is clear from the comparative analysis that in terms of the number of outlets (145), the overall quantum of comparison retail floorspace is significantly below the respective Goad national averages. Whilst this may be a temporary ‘blip’ given the ongoing extensive redevelopment of the Stamford Quarter and the existing JJB / Superdrug unit at the southern end of George Street (LPA ref. H/66080), it is apparent that Altrincham is acutely under-represented in this retail sector. This was the same in 2000, where the survey found that the total number of comparison units (186), as a proportion of the total number of units within Altrincham town centre was significantly below (41.15%) the national average of 49.73%. The proportion of town centre floorspace for comparison retailing was 47.59%, when the national average was 54.40%.

6.15 This under-representation in comparison retailing is even more apparent when one considers that there has been a significant increase in the quantum of non retail floorspace since the 2001 Study, with the total number of non retail outlets in Altrincham being above the national average (43.28% in comparison to 32.42% nationally). This is in addition to the overall floorspace dedicated to non retail uses (34.17%) being also significantly above the national average (20.39%). These trends may be attributable to the increasing quantum of leisure floorspace, potentially reflecting the wider diversification and enhancement of the town centre offer.

6.16 In terms of miscellaneous floorspace, whilst the number of outlets is above the national average, the overall quantum of floorspace is significantly below Goad national average. We consider that this may be due to the fact that we have removed the major office developments (e.g. Station House) from the town centre survey schedule and that the edge and out-of-centre office (employment) sector is relatively well developed in
Altrincham given the locational advantages for business due to the excellent strategic transport connections nearby.

**Vacancies**

6.17 As table 2 (above) highlights, the number of vacant units within Altrincham town centre has increased from 70 units in 2000 to 76 units in 2007, equating to an increase of 1,682 m² (gross) from 10,311 m² (gross) to 11,993 m² of vacant floorspace at present.

6.18 Whilst this is of slight concern, we attribute the increase in vacant units to the ongoing redevelopment of the Stamford Quarter and the JJB / Superdrug units at the southern end of George Street, which has precipitated the vacation of several prime pitch retail units in advance of redevelopment and the fact that the new units on Railway Street have yet to be occupied.

6.19 However, notwithstanding the number of vacancies identified in the town centre, whilst the number of units vacant is significantly above the Goad national average (17.31% against 10.29% nationally), the actual percentage of floorspace within the town centre (9.71%) is only marginally above the national average of 9.18%. When compared against the 2000 survey results, it is apparent that there has been a significant increase in the proportion of units vacant in the town centre from 15.49% (national average was 11.61%). The total quantum of floorspace as a proportion of the overall town centre floorspace has only marginally increased since the 2000 survey.

**Use Class Composition**

6.20 PPS6 states that a diversity of uses in town centres makes an important contribution to their vitality and viability. Different but complementary uses, during the day and in the evening, can reinforce each other and make town centres more attractive to local residents and visitors alike.

**Table 3 – Altrincham Use Class Composition**

<table>
<thead>
<tr>
<th>Use Class</th>
<th>Year</th>
<th>No. of Units</th>
<th>% of total number of units</th>
<th>Unit Trend (2000 – 2007)</th>
<th>Floorspace (m²)</th>
<th>% of total floorspace</th>
<th>Floorspace Trend (m²)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class A1</td>
<td>2000</td>
<td>235</td>
<td>52</td>
<td>-40</td>
<td>69,948</td>
<td>58</td>
<td>-941</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>195</td>
<td>44.42</td>
<td></td>
<td>69,007</td>
<td>56.04</td>
<td></td>
</tr>
<tr>
<td>Class A2</td>
<td>2000</td>
<td>67</td>
<td>15</td>
<td>-10</td>
<td>13,749</td>
<td>11</td>
<td>-2,578</td>
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</table>
### Class A3 – A5

<table>
<thead>
<tr>
<th>Year</th>
<th>Floorspace</th>
<th>Change</th>
<th>Total Floorspace</th>
<th>Floorspace Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>55</td>
<td>12</td>
<td>11,913</td>
<td>10</td>
</tr>
<tr>
<td>2007</td>
<td>69</td>
<td>15.72</td>
<td>12,608</td>
<td>10.24</td>
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### Class B1

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<th>Change</th>
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<th>Floorspace Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>9</td>
<td>2</td>
<td>4,243</td>
<td>4</td>
</tr>
<tr>
<td>2007</td>
<td>19</td>
<td>4.33</td>
<td>3,419</td>
<td>2.78</td>
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### Class D1

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<th>Floorspace Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>3</td>
<td>1</td>
<td>2,420</td>
<td>2</td>
</tr>
<tr>
<td>2007</td>
<td>3</td>
<td>0.68</td>
<td>2,420</td>
<td>1.97</td>
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### Class D2

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<th>Floorspace Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>5</td>
<td>1</td>
<td>4,605</td>
<td>4</td>
</tr>
<tr>
<td>2007</td>
<td>6</td>
<td>1.37</td>
<td>7,819</td>
<td>6.35</td>
</tr>
</tbody>
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### Sui Generis

<table>
<thead>
<tr>
<th>Year</th>
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<th>Change</th>
<th>Total Floorspace</th>
<th>Floorspace Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>6</td>
<td>1</td>
<td>3,248</td>
<td>3</td>
</tr>
<tr>
<td>2007</td>
<td>10</td>
<td>2.28</td>
<td>3,642</td>
<td>2.96</td>
</tr>
</tbody>
</table>

### Vacant

<table>
<thead>
<tr>
<th>Year</th>
<th>Floorspace</th>
<th>Change</th>
<th>Total Floorspace</th>
<th>Floorspace Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>70</td>
<td>15</td>
<td>10,311</td>
<td>9</td>
</tr>
<tr>
<td>2007</td>
<td>75</td>
<td>17.08</td>
<td>12,571</td>
<td>10.21</td>
</tr>
</tbody>
</table>

*Based on Trafford Council Town Centre Surveys (2000 – 2007). Other floorspace (e.g. C3 residential dwellings) not shown in order to enable direct comparison. May not add up due to rounding.*

6.21 Comparing the breakdown of uses within the town centre since the 2000 survey, it is clear that the main trends have been a significant increase in D2 uses, due to the Denmark Street leisure development; a significant increase in vacancies, attributable to the Stamford Quarter / Railway Street developments; and the increase in the number and quantum of floorspace dedicated to class A3 – A5 developments.

**Retailer Representation**

6.22 Experian Goad defines a multiple retailer as being part of a network of nine or more outlets. The presence of multiple outlets can enhance the appeal of a town centre to local residents and is taken as a comparative measurement of strength with the higher order centres naturally tending to support the greater number of multiple retailers.

6.23 With respect to Altrincham, there are presently 100 multiple retailers within the town centre, which equates to 22.77% of the total town centre provision. This compares unfavourably with the Goad national average of 33.94% and suggests that whilst Altrincham draws on a sub-regional catchment, its mainstream national retail offer is relatively weak. There is potential to improve and increase retailer representation within the town centre to a quantum befitting of a sub-regional centre.
6.24 We expect that the new retail floorspace being brought forward through the Stamford Quarter redevelopment will be occupied by national retailers (e.g. Debenhams) and thus increase Altrincham’s multiple retail offer. However, the lack of larger national multiples partially explains the leakage of comparison retail expenditure from the Altrincham catchment to Manchester City Centre and The Trafford Centre, which are higher order centres.

6.25 The number of retailer requirements / demand set out below also indicates that Altrincham is attractive to several other national retailers who are seeking premises within the town centre.

**Retailer Requirements**

6.26 The table below highlights the number of published retailer requirements held on the *Focus Retail Intelligence* database for Altrincham and each of the four main town centres within the Borough as well as the retailer requirements for both Stockport and Macclesfield.

<table>
<thead>
<tr>
<th>Table 4 – Retailer Requirements – Sub-Regional Comparative Analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Altrincham</td>
</tr>
<tr>
<td>-----------</td>
</tr>
<tr>
<td>2007</td>
</tr>
<tr>
<td>2006</td>
</tr>
<tr>
<td>2005</td>
</tr>
<tr>
<td>2004</td>
</tr>
<tr>
<td>2003</td>
</tr>
<tr>
<td>2002</td>
</tr>
<tr>
<td>2001</td>
</tr>
<tr>
<td>2000</td>
</tr>
</tbody>
</table>

*Source: Focus Retail Database, 2007*

6.27 As the table highlights, the retailer requirements published on *Focus Retail Intelligence* database has steadily increased over the past seven years, suggesting that Altrincham is increasingly being viewed as an attractive centre for retailers to locate. This may be attributable to the recent investment in the town centre to provide more modern retail accommodation (e.g. larger floorplates) and a better physical environment to improve the shopping experience. The recent investment in the town centre is allied to the increasing attractiveness of the catchment to retailers, with the south of the Borough being particularly affluent.
6.28 On a sub-regional level, it is particularly encouraging that Altrincham has a similar number of retailer requirements in comparison to sub-regional centres such as Stockport, Bury and Macclesfield, all of which are subject to significant town centre redevelopment programmes at present.

6.29 In terms of the main retailer requirements for Altrincham, the Focus Retail Intelligence database holds c. 45,000 m$^2$ of unsatisfied requirements. Whilst there is particularly strong interest from lower-order convenience retailers for premises within the town, given the existing strength of the town centre offer and the opening of a new Aldi store at Altrincham Retail Park, we consider that there is no overriding need for new discount convenience retail provision at present.

6.30 With respect to non-bulky comparison requirements, the recent development of the Debenhams (Desire concept) will further distinguish Altrincham from other retail centres in the sub-region.

6.31 Whilst we anticipate that further higher order comparison retailers will be attracted to anchor later phases of the Stamford Quarter redevelopment, we consider there is scope for further higher order fashion retailers for within Altrincham to maintain and increase its existing market share. In addition, such retailers will improve the town’s profile as a sub-regional centre to a wider catchment and enable it to compete more effectively with higher order centres such as Manchester City Centre.

6.32 Notwithstanding the required focus on higher order retailers, we understand that there are presently outstanding requirements for large discount clothing / variety operators such as TK Maxx, Instore and TJ Hughes. Such retailers fulfil a valuable role in widening the breadth of the town centre retail offer.

6.33 With respect to the requirements from the bulky goods operators, whilst the majority naturally look towards retail warehouse units in out-of-centre locations such as Altrincham Retail Park, we consider that town centre friendly bulky goods retailers such as Ponden Mill (homeware) or Maplin Electronics would add to the town centre offer.

6.34 Whilst the food and drink provision within the town centre is strong with a thriving local restaurant scene complemented by the opening of several national chain restaurants within the Denmark Street leisure development, in terms of developing Altrincham’s evening economy, the outstanding requirements from operators such as Pizza Express and Ask Restaurants is particularly positive. We consider that this type of operator will deliver a qualitative enhancement to the existing town centre offer.
6.35 A full list of retailer requirements, as held by Focus, is provided at Appendix 14.

**Shopping Rents**

6.36 The level of rent which retailers are prepared to pay for retail space within a town centre and the rate movement over time is an indication of the perceived strength of that centre (although other factors such as the availability of floorspace has an impact on rental value).

a) Valuation Office (VOA) Rental Values

6.37 The VOA publishes rental value data for the main sub-regional centres within the North West on a twice a year basis. The rental data relates to three types of retail pitch:

- **Type 1** – Prime position in Principal Shopping Centre (e.g. Stamford Quarter);
- **Type 2** – Good Secondary off-peak position in Principal Shopping Centre; and
- **Type 3** – Modern, purpose-built, non-food, warehouse unit, circa 2,500 m$^2$ to 5,000 m$^2$. Edge-of-town location with car parking (e.g. Altrincham Retail Park).

6.38 On the basis of the different types of retail accommodation, the table below highlights the changing rental values (£/m$^2$) in Altrincham and other competing sub-regional centres, although rental value data for Macclesfield and Bury is not available.

**Table 5 – Comparison of Rental Values (£/m$^2$), 2001 - 2007**

<table>
<thead>
<tr>
<th></th>
<th>Altrincham</th>
<th>Stockport</th>
<th>Bolton</th>
<th>Warrington</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Jan 07</td>
<td>1,250</td>
<td>525</td>
<td>240</td>
<td>2,250</td>
</tr>
<tr>
<td>Jan 06</td>
<td>1,250</td>
<td>600</td>
<td>240</td>
<td>2,250</td>
</tr>
<tr>
<td>Jan 05</td>
<td>1,250</td>
<td>600</td>
<td>240</td>
<td>2,150</td>
</tr>
<tr>
<td>Jan 04</td>
<td>1,250</td>
<td>575</td>
<td>225</td>
<td>2,150</td>
</tr>
<tr>
<td>April 03</td>
<td>1,250</td>
<td>575</td>
<td>225</td>
<td>2,150</td>
</tr>
<tr>
<td>April 02</td>
<td>1,250</td>
<td>575</td>
<td>215</td>
<td>2,100</td>
</tr>
<tr>
<td>April 01</td>
<td>1,250</td>
<td>575</td>
<td>215</td>
<td>2,000</td>
</tr>
</tbody>
</table>
6.39 The VOA data clearly shows that whilst prime zone rental values have remained constant since the start of the decade, values are significantly below those in comparable sub-regional centres within the retail hierarchy. This suggests that Altrincham has a weaker prime retail pitch at present than the other centres, although we anticipate that the rental values will increase with the provision of new prime accommodation through the Stamford Quarter redevelopment and extension.

6.40 Secondary non-peak accommodation is comparable to present rental levels in Warrington and whilst weaker than the other sub-regional centres, should increase with new developments such as the Mere Park scheme at the southern end of George Street. With respect to edge-of-centre retail warehouse style accommodation, the VOA data suggests that Altrincham is performing relatively well compared to other competing sub-regional centres.

b) Collier’s CRE Prime Retail Rents

6.41 VOA rental values do not consider smaller centres within the sub-regional retail hierarchy, as such we have utilised Colliers CRE assessment of open market Zone A rents in order to further understand rental values and town centre performance. The rental values relate to a hypothetical shop unit of optimum size and configuration in the prime pitch and have been arrived at by adopting zone sizes standard for the location. The table below outlines ‘Prime Zone A’ Retail Rents in Altrincham and other competing sub-regional centres.

<table>
<thead>
<tr>
<th>(June)</th>
<th>Altrincham</th>
<th>Macclesfield</th>
<th>Bury</th>
<th>Bolton</th>
<th>Stockport</th>
<th>Warrington</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>95</td>
<td>90</td>
<td>130</td>
<td>140</td>
<td>190</td>
<td>145</td>
</tr>
<tr>
<td>2006</td>
<td>100</td>
<td>80</td>
<td>125</td>
<td>140</td>
<td>190</td>
<td>145</td>
</tr>
<tr>
<td>2005</td>
<td>100</td>
<td>80</td>
<td>105</td>
<td>140</td>
<td>190</td>
<td>145</td>
</tr>
<tr>
<td>2004</td>
<td>100</td>
<td>80</td>
<td>100</td>
<td>140</td>
<td>190</td>
<td>145</td>
</tr>
<tr>
<td>2003</td>
<td>100</td>
<td>80</td>
<td>100</td>
<td>130</td>
<td>190</td>
<td>145</td>
</tr>
<tr>
<td>2002</td>
<td>100</td>
<td>80</td>
<td>100</td>
<td>130</td>
<td>200</td>
<td>145</td>
</tr>
<tr>
<td>2001</td>
<td>100</td>
<td>80</td>
<td>100</td>
<td>140</td>
<td>190</td>
<td>140</td>
</tr>
<tr>
<td>2000</td>
<td>100</td>
<td>80</td>
<td>95</td>
<td>140</td>
<td>190</td>
<td>130</td>
</tr>
<tr>
<td>1999</td>
<td>100</td>
<td>80</td>
<td>95</td>
<td>140</td>
<td>185</td>
<td>110</td>
</tr>
<tr>
<td>1998</td>
<td>100</td>
<td>80</td>
<td>85</td>
<td>140</td>
<td>180</td>
<td>105</td>
</tr>
<tr>
<td>1997</td>
<td>95</td>
<td>70</td>
<td>75</td>
<td>125</td>
<td>160</td>
<td>105</td>
</tr>
</tbody>
</table>

6.42 The table highlights that average rental values in Altrincham town centre primary shopping area have remained relatively constant over the past decade. The stability of the prime
shopping area retail rents suggests that retailer / investor confidence within the main town centres remain positive. However, the data does highlight that Altrincham is significantly weaker in terms of rental values than all the sub-regional centres identified except for Macclesfield, suggesting that there is scope for improvement.

**Commercial Yields**

6.43 The Commercial Yield on non-domestic property is an indication of the confidence of investors in the long-term profitability of the town centre. The yield on property investment represents the return (in form of rent) on capital to an investor. As property investments do not usually produce a fixed income (i.e. rents are reviewed according to market conditions, and the terms of the property’s lease), the greater the prospect of future rental growth, the lower the initial yield which an investor would be prepared to accept.

6.44 Conversely, a higher yield reflects the lower expectation of future rental growth prospects. Yields are therefore an indicator of expectations of the general economic prospects for a town centre. The table below compares the prime retail yields in Altrincham against competing and comparable centres within the wider sub-regional retail hierarchy.

**Table 7: Comparison of Prime Retail Yields (%) (2001 – 2007)**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Altrincham</td>
<td>5.50</td>
<td>7.50</td>
<td>8.0</td>
<td>8.0</td>
<td>8.0</td>
<td>8.25</td>
<td>6.5</td>
<td>6.25</td>
<td></td>
</tr>
<tr>
<td>Stockport</td>
<td>5.0</td>
<td>5.0</td>
<td>5.5</td>
<td>5.5</td>
<td>5.5</td>
<td>6.0</td>
<td>5.5</td>
<td>5.5</td>
<td></td>
</tr>
<tr>
<td>Macclesfield</td>
<td>8.0</td>
<td>7.0</td>
<td>7.75</td>
<td>7.75</td>
<td>7.5</td>
<td>7.5</td>
<td>7.5</td>
<td>6.75</td>
<td></td>
</tr>
<tr>
<td>Bury</td>
<td>6.75</td>
<td>6.0</td>
<td>6.5</td>
<td>6.75</td>
<td>6.75</td>
<td>6.75</td>
<td>7.0</td>
<td>6.0</td>
<td>5.75</td>
</tr>
<tr>
<td>Bolton</td>
<td>6.50</td>
<td>6.0</td>
<td>6.0</td>
<td>6.25</td>
<td>6.25</td>
<td>6.25</td>
<td>6.5</td>
<td>6.0</td>
<td>6.0</td>
</tr>
<tr>
<td>Warrington</td>
<td>6.75</td>
<td>6.5</td>
<td>6.5</td>
<td>6.5</td>
<td>6.5</td>
<td>6.5</td>
<td>6.25</td>
<td>5.75</td>
<td>5.75</td>
</tr>
</tbody>
</table>

Source: VOA

6.45 The prime retail yield in Altrincham town centre has fluctuated significantly with a significant decrease in confidence in the 1990’s, which may be attributable to The Trafford Centre opening. However, investor confidence has risen significantly over the last two years, which perhaps reflects the ongoing and committed redevelopment of the Stamford Quarter and potential future investment in the town through the Altair scheme.
Pedestrian Flows

6.46 A pedestrian footfall survey was completed in July 2007 for each of the four main town centres within the Borough as well as Partington. The survey was undertaken on the same days as the Council previous annual surveys and utilises the same survey points in order to enable direct comparative analysis. The pedestrian footfall surveys results along with centre plans showing the survey points for each centre are provided at Appendix 13 for reference.

6.47 In Altrincham, the pedestrian footfall survey results identified that the busiest areas within the town centre are on George Street and Moss Lane, which follows the pattern of the previous results. The weekly average figure for Altrincham was over 10% higher in 2007 than compared to 2006 and although Friday was quieter in comparison, the footfall flows for Saturday were higher than the previous year. The poor summer weather is likely to be a contributing factor to the survey results with Friday’s footfall surveys being influenced by heavy rain.

6.48 The Saturday flows may also have been largely influenced by the recent closure of the Metrolink tramline to Manchester City Centre with more local residents shopping in Altrincham than would normally expect to do so. However, with the opening of the phase I redevelopment of the Stamford Quarter and also the Denmark Street leisure development, it may be the beginning of a longer-term positive trend.

6.49 Despite an overall increase in pedestrian flow, the main shopping areas on George Street had experienced a substantial fall in numbers in comparison to 2006, which is likely to be attributable to the ongoing redevelopment of the Stamford Quarter.

6.50 The overall (daily / weekly) figures has also been potentially skewed by greater numbers of pedestrians in traditionally quieter areas such as Stamford Road and Lloyd Street, which have experienced substantial redevelopment over recent years, particularly in terms of leisure development and new multi-storey car park at Moss Lane.

Comparative Analysis – Benchmarking

6.51 Further to the detailed qualitative analysis provided above, it is possible by drawing on several data sources to show the performance of Altrincham relative to other comparable and competing centres within the sub-regional retail hierarchy.
a) Experian Retail Centre Ranking Survey

6.52 Experian’s Retail Centre Ranking Survey, first published in 1998 and updated on a yearly basis, assesses the vitality and viability of retail centres taken from the more detailed Experian Goad database. Six factors\(^3\) are combined to generate a ‘vitality score’ for each centre, which is then ranked accordingly.

6.53 Unfortunately, Experian ceased publishing its Retail Centre Ranking Report for centres outside of the national top 250 in 2002 and outside the national top 50 for the years 2003 – 2004. The principal centres within the Borough are not included towards the latter years of the assessment. Production of the Experian Retail Centre Ranking Report has now ceased, although GVA understands that it may be re-launched towards the end of 2007.

Table 8 – Experian National Retail Centre Ranking 1998 - 2002

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Altrincham</td>
<td>136</td>
<td>163</td>
<td>179</td>
<td>188</td>
<td>-52</td>
</tr>
<tr>
<td>Urmston</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Stockport</td>
<td>46</td>
<td>31</td>
<td>35</td>
<td>44</td>
<td>+2</td>
</tr>
<tr>
<td>Warrington</td>
<td>60</td>
<td>55</td>
<td>63</td>
<td>66</td>
<td>-6</td>
</tr>
<tr>
<td>Macclesfield</td>
<td>180</td>
<td>185</td>
<td>177</td>
<td>201</td>
<td>-21</td>
</tr>
</tbody>
</table>

Source: Experian Goad Retail Centre Reports 1998 - 2002

6.54 Experian Goad ranks Altrincham as the 188\(^{th}\) centre in terms of its ‘vitality’ score nationally in 2002. However, as the table indicates, Altrincham has suffered a significant decrease (52 places) in its national retail centre ranking over the four-year survey period (1998 – 2002). Whilst this may be attributable, in part, to the effect of the Trafford Centre on the vitality score of Altrincham town centre, part of the reduction may be attributable to other centres improving their retail offer comparative to a lack of improvement in the Altrincham offer.

b) Venue Score Retail Ranking

6.55 The Venue Score ranking index has adopted the Management Horizon’s UK Shopping Index methodology, which was based on the total number of national non-food or

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\(^3\) The factors included within the ranking are (approximate weighting in brackets): - Number of multiple retailers (40%); Number of service and misc. outlets (10%); Number of comparison retailer outlets (10%); Floorspace of multiple retailer outlets (10%); Floorspace of vacant outlets (10%); and Number of key retailer attractors.
comparison retail multiples located in a centre and enabled comparative assessment of the critical mass and marketing position of the top 1,000 retail destinations in the UK.

6.56 Using a system of weighting, the Venue Score analysis reflects the range and quality of national retailers represented in a centre. The results are as follows:

<table>
<thead>
<tr>
<th>Centre</th>
<th>Centre Classification (Management Horizons)</th>
<th>Venue Score Rank 2005</th>
<th>2006 Venue Score Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Altrincham</td>
<td>Sub-Regional</td>
<td>166</td>
<td>188</td>
</tr>
<tr>
<td>Stockport</td>
<td>Regional</td>
<td>79</td>
<td>83</td>
</tr>
<tr>
<td>Urmston</td>
<td>District Centre</td>
<td>421</td>
<td>364</td>
</tr>
<tr>
<td>Sale</td>
<td>District Centre</td>
<td>411</td>
<td>444</td>
</tr>
<tr>
<td>Stretford</td>
<td>Major District Centre</td>
<td>260</td>
<td>277</td>
</tr>
<tr>
<td>Warrington</td>
<td>Regional</td>
<td>83</td>
<td>95</td>
</tr>
<tr>
<td>Timperley</td>
<td>Local Centre</td>
<td>1,960</td>
<td>2,071</td>
</tr>
<tr>
<td>Hale</td>
<td>Local Centre</td>
<td>-</td>
<td>1,528</td>
</tr>
<tr>
<td>Macclesfield</td>
<td>Sub-Regional</td>
<td>170</td>
<td>159</td>
</tr>
</tbody>
</table>

Source: Venue Score 2005 - 2006 from Javelin Group

6.57 The Venue Score rankings highlight that Altrincham presently performs relatively poorly in relation to comparable town centres in the sub-regional catchment such as Stockport and Warrington. However, the ranking system does not consider the quality of the independent retail sector and it is anticipated that the Stamford Quarter development allied to the recent opening of the Denmark Street leisure development, will significantly improve Altrincham’s viability / vitality rating. We anticipate that Altrincham will improve its Venue national retail ranking, although many comparable centres are also progressing with town centre redevelopment / extension programmes.

**Qualitative Analysis**

6.58 Whilst a local business survey has not been undertaken as part of this study, as part of a Government (DCLG) research initiative for Altrincham Town Centre Partnership (whose membership includes local businesses and other key town centre stakeholders) into the effectiveness of town centre management strategies, a telephone survey of 61 businesses was undertaken in July 2006.

6.59 The survey results, showed the following key points:
• 3.3% of businesses were seeking to relocate within the local area whilst 95.1% of businesses had no plans to change;

• The lack of adequate customer car parking facilities was perceived by local businesses as the main factor constraining performance whilst the ongoing refurbishment (Stamford Quarter) was identified as a temporary factor constraining performance;

• 86% of respondents considered their business performance to be ‘good’ or ‘satisfactory’, although 21% considered performance to be ‘poor’. However, businesses are positive about future trading performance with 67% expecting an improvement in performance;

• In terms of strengths of Altrincham town centre, local businesses identified safety during the day, a clean town centre environment and the way businesses work together; and

• With respect to weaknesses, the availability of car park, high rents / rates, interest of landlords in property maintenance and town centre events were the main issues identified.

6.60 It is understood that a new business survey will be undertaken as a follow up early next year and will inform the Town Centre Partnership’s future Strategy and Action Plan.

Sale

Diversity of Uses

6.61 As with Altrincham, whilst there has been some change within the town centre, the most prominent being the Sale Waterside development and the remodelling of The Square Shopping Centre, the only recount changes relate to the adoption by the Council of the measurement conventions used by Experian Goad (upper floor references removed) since the publication of the 2001 Retail Study.
Table 10 – Sale Town Centre Floorspace Composition

<table>
<thead>
<tr>
<th>Retail Sector</th>
<th>2000 Floorspace (sq. m)</th>
<th>2007 Floorspace (sq. m)</th>
<th>Floorspace Change (2000 - 2007) (sq. m)</th>
<th>No. of Units 2000</th>
<th>No. of Units 2007</th>
<th>Unit Change 2000 – 2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience</td>
<td>13,884</td>
<td>15,179</td>
<td>+1,295</td>
<td>24</td>
<td>20</td>
<td>-4</td>
</tr>
<tr>
<td>Comparison</td>
<td>20,733</td>
<td>14,206</td>
<td>-6,527</td>
<td>75</td>
<td>66</td>
<td>-11</td>
</tr>
<tr>
<td>Service</td>
<td>28,834</td>
<td>22,424</td>
<td>-6,410</td>
<td>87</td>
<td>103</td>
<td>+16</td>
</tr>
<tr>
<td>Vacant</td>
<td>3,315</td>
<td>5,009</td>
<td>+1,694</td>
<td>20</td>
<td>23</td>
<td>+3</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>3,946</td>
<td>17,017</td>
<td>+13,071</td>
<td>10</td>
<td>5</td>
<td>-5</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>70,712</strong></td>
<td><strong>73,835</strong></td>
<td><strong>+3,123</strong></td>
<td><strong>216</strong></td>
<td><strong>217</strong></td>
<td><strong>+1</strong></td>
</tr>
</tbody>
</table>

Source: Trafford Council In-Centre Surveys (based on actual UDP defined town centre boundaries) (may not add up due to rounding)

6.62 Whilst the overall floorspace within the town centre has increased over the seven year period, the main changes in the composition of the town centre relate to the minor increase in convenience retail, reflecting the opening of the M&S Simply Food store and the minor expansion of the Quality Save store within The Square. However, with the Kwik Save store closed in the intervening period (unit remains vacant at present); the development of a new Aldi store on School Road will increase the overall quantum of convenience floorspace in the town centre.

6.63 With respect to comparison retail, the survey results highlight that there has been a significant reduction in the amount of comparison floorspace within the centre. Whilst this is predominantly attributable to the re-measurement of the town centre survey base, it may be in part attributable to the increase in non-retail service and vacant units within the town centre. The decrease in comparison retail floorspace also suggests that Sale’s comparison retail offer has become more secondary in its nature.

6.64 The main increase in floorspace within the town centre has been within the office and non-retail sectors by virtue of the Sale Waterside mixed-use development, which includes the Council’s offices, a new theatre, arts and other community / public facilities.

6.65 With regard to vacancies, whilst there are several small units vacant on the more secondary frontages within the town centre, the main units vacant relate to the former Kwik Save store on School Road and also the vacant site to which Aldi has extant consent for the development of a new foodstore and three small non-food retail units. This site is prominently located on the primary retail frontage within the town centre and it is anticipated that the present vacancy rates identified in the 2007 town centre survey are temporarily ‘skewed’.
Unit Composition

In comparison to the 2001 Study, the table below highlights that there has been some significant structural changes in the unit composition of Sale Town Centre.

Table 11– Sale Town Centre Composition

<table>
<thead>
<tr>
<th></th>
<th>Units</th>
<th>Floorspace</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Year</td>
<td>Number</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>20</td>
</tr>
<tr>
<td>Comparison</td>
<td>2000</td>
<td>75</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>66</td>
</tr>
<tr>
<td>Service</td>
<td>2000</td>
<td>87</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>103</td>
</tr>
<tr>
<td>Vacant</td>
<td>2000</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>23</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>2000</td>
<td>10</td>
</tr>
<tr>
<td>(excl. Vacant)</td>
<td>2007</td>
<td>5</td>
</tr>
</tbody>
</table>

Based on Trafford Council Town Centre Survey (as updated) and Experian Goad In-Centre Reports. May not add up due to rounding.

The survey results show that whilst the number of units within the town centre occupied for convenience retail has decreased since 2000, the quantum of convenience floorspace has increased.

By contrast there has been a significant decline in the number of comparison units within the town centre and this potentially reflects the focus of comparison goods retailing into the higher order centres within the catchment (The Trafford Centre, Manchester City Centre and Altrincham). It seems that there is clear potential to increase the comparison goods offer within the town centre.

Whilst the decline in the quantum of floorspace may be attributable to the re-measurements undertaken since the 2001 Study, it is clear with respect to comparison
retail provision in Sale that; the number of comparison units within the town centre (30.4%), is significantly below the Goad national average (46.85%); and the proportion of total floorspace dedicated to comparison retailing (19.24%) is significantly below the national average of 52.3%.

Vacancies

6.70 With respect to vacant units, the number of units presently vacant is marginally above the national average (10.6% against 10.2% nationally) whilst in floorspace terms, the town centre is marginally below the national average with 6.7% in comparison to 8.6% nationally. This suggests that the majority of units which are vacant are small and do not meet current requirements for larger floorplate configurations. Therefore, notwithstanding potential qualitative improvements in the town centre retail offer, we consider that there is a need to provide the larger floorplates required by national multiple retailers. The provision of larger floorplates could be achieved through new development or the amalgamation of smaller existing units.

Use Class Composition

6.71 Sale has changed significantly over the period since 2000, with a noticeable decrease in retail uses allied to increase in non-retail uses.

Table 12 – Sale Use Class Composition

<table>
<thead>
<tr>
<th>Use Class</th>
<th>Year</th>
<th>No. of Units</th>
<th>% of total number of units</th>
<th>Unit Trend (2000 – 2007)</th>
<th>Floorspace (m²)</th>
<th>% of total floorspace</th>
<th>Floorspace Trend (m²)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class A1</td>
<td>2000</td>
<td>124</td>
<td>57</td>
<td>-17</td>
<td>38,440</td>
<td>54</td>
<td>-6,534</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>107</td>
<td>49.3</td>
<td></td>
<td>31,906</td>
<td>43.21</td>
<td></td>
</tr>
<tr>
<td>Class A2</td>
<td>2000</td>
<td>30</td>
<td>14</td>
<td>-2</td>
<td>6,862</td>
<td>10</td>
<td>-2,133</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>28</td>
<td>12.9</td>
<td></td>
<td>4,729</td>
<td>6.40</td>
<td></td>
</tr>
<tr>
<td>Class A3 – A5</td>
<td>2000</td>
<td>28</td>
<td>13</td>
<td>+11</td>
<td>6,124</td>
<td>9</td>
<td>+2,374</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>39</td>
<td>17.97</td>
<td></td>
<td>8,498</td>
<td>11.5</td>
<td></td>
</tr>
<tr>
<td>Class B1</td>
<td>2000</td>
<td>3</td>
<td>1</td>
<td>+7</td>
<td>4,091</td>
<td>6</td>
<td>+9,152</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>9</td>
<td>4.14</td>
<td></td>
<td>13,243</td>
<td>17.93</td>
<td></td>
</tr>
<tr>
<td>Class D1</td>
<td>2000</td>
<td>4</td>
<td>2</td>
<td>+1</td>
<td>822</td>
<td>14</td>
<td>+853</td>
</tr>
</tbody>
</table>
The survey results show that with respect to the use class composition of Sale, the main changes have been in relation to the growth in offices (Council Offices at Sale Waterside), the increase in Class A3 – A5 (bars, restaurants and takeaways) by c. 2,400 m² (gross), which may attributable to the new restaurant / bar floorspace within the Sale Waterside development, and a decrease in Class A1 retailing as considered above. These trends largely reflect the general national trends towards diversifying the town centre offer, with added emphasis on non-retail and leisure uses.

**Retailer Representation**

6.73 With respect to multiple retailer representation, sale supports 10 key retailers that Goad consider to be key attractors to town centres, including Marks & Spencer (Simply Food), Tesco and Sainsbury’s. Main key comparison retailers within Sale include New Look, Boots and Dorothy Perkins.

6.74 In terms of national multiple retailers, our survey finds that there are 62 national multiple retailers present within Sale, which equates to 28.5% of the overall provision. This is slightly below the Goad national average of 33.9% present and possibly suggests that there is potential to attract more national retailers to the town centre. This is certainly the case for comparison retailers, although the close proximity to Altrincham and the other larger centres within the sub-regional retail hierarchy (e.g. Manchester) will continue to constrain the retail offer; the convenience offer however is particularly strong (Sainsbury’s, Tesco and Marks & Spencer).
Retailer Requirements

6.75 Retailer requirements for premises within Sale, as published on the Focus Retail Intelligence database, has remained relatively constant over recent years with 16 requirements registered in 2000 (a national retailer requirement ranking of 291), rising to 21 requirements in 2007 (Sale is ranked 406th).

6.76 More specifically, drawing on the published retailer requirements from both the Focus and Property Intelligence databases, there is presently an outstanding requirement for between c. 3,500 m² and c. 7,650 m² of retail floorspace. Whilst demand exists from discount convenience retailers, although the existing convenience provision is strong and as the quantitative assessment later in this report illustrates, Sale more than adequately meets locally arising need. As we go to address in our appraisal of town centre opportunity sites later in this report, we consider that the Aldi site within the town centre would be better suited for non-bulky comparison retail.

6.77 With respect to comparison retailer requirements, we consider that it is unlikely that Sale will be able to attract the type of higher order fashion retailers required in order to raise the profile of the town centre as a viable comparison shopping destination. Whilst the Council should seek to build on those national multiples that are present (such as Dorothy Perkins), there may be the opportunity to encourage the provision of more middle order retailers (both bulky and non-bulky) in order to effectively ‘recycle’ the existing vacant floorspace within the town centre.

6.78 With regards to leisure provision there is a stated requirement from Pizza Express for premises within the town. This requirement is particularly positive given that the evening economy is presently biased towards non-family pubs and bars.

Shopping Rents

6.79 Shopping Rents have remained relatively constant since 1997 at c. £45 to £50 per square foot for accommodation on the prime retail frontage within the town centre. This is slightly higher than the £40 per square foot rental levels identified in the 2001 Study.

Commercial Yields

6.80 According to the Valuation Office (VOA), the prime retail yields for Sale town centre have fluctuated significantly over the past 13 years. In April 1994, yields in Sale town centre were at 7.5%. However, with the opening of The Trafford Centre in September 1998,
investor confidence in the town fell quite considerably to 9% in April 2001 and to over 10% in April 2002. Since this loss of confidence, investor confidence has recovered significantly and in January 2007, the yield was 6.5%, which is only marginally behind that of Altrincham (6.25%).

**Pedestrian Flows**

6.81 In comparison to the survey results for last year, Sale was a relatively strong performer with significantly higher pedestrian flows than identified in the previous year’s survey. This is reflected in the fact that on Saturday (14th July) for example, the pedestrian flows almost doubled, which as per Altrincham, may be attributable to the closure of the Metrolink and thus more local residents deciding to undertake their shopping trips within Sale.

6.82 The footfall survey provides that the busiest survey points in Sale where at the entrance to The Square Mall and at the entrance to Sainsbury’s off School Road, which is consistent with the 2006 survey results. The quietest areas were again found to be towards the eastern edges of the town centre on Northenden Road and Broad Road, which is again comparable with the previous year’s survey results. The survey results also indicated that the entrance to Sainsbury’s car park was particularly busy on both of the survey days.

**Comparative Analysis – Benchmarking**

6.83 The Experian Retail Centre Ranking Report shows Sale as only ranked at 213 m 1998 and 411th in 2000. This ranking was below that given to Stretford for the comparable years.

6.84 The *Venue Score Retail Rankings* shows Sale as a district centre ranked 411th nationally in 2005, marginally declining to 444th in 2006.

**Qualitative Analysis**

6.85 The Sale Town Centre Partnership, which represents a variety of local stakeholders and is supported by Trafford Council, considered the strengths, weaknesses, opportunities and threats (SWOT analysis) of Sale town centre in November 2006.

6.86 In terms of strengths, the Partnership considers that the town’s good town centre offer, with a variety of shops, central services (e.g. Sale Waterside), businesses and leisure facilities is a particular strength of the town. This is allied to the improving evening economy (e.g. bars and restaurants at Sale Waterside) and the significant improvements in
The local townscape and physical environment works completed (e.g. Town Hall, Canal) recently.

6.87 The Partnership identified the lack of large national retailers allied to the impact and trade draw of The Trafford Centre as a major weakness in the town centre offer. This is in addition to the lack of choice of shops and the perceived concentration of lower order retailers within the town centre. Concern was also shown for higher rates / rents, which are forcing smaller retailers out of the primary shopping area and the lack of available car parking capacity at peak times, although this has been recently remedied with the opening of the Q Park development at Sale Waterside. In addition, whilst it was acknowledged that significant improvements have been made to the townscape recently, the Partnership considered that further improvements are required.

6.88 The Partnership identified the main retail improvements required for Sale town centre from a retail perspective, are to attract a better choice of independent shops so as diversify the retail offer and not merely replicate the existing offer in Altrincham. The Partnership also identified the regeneration of the Cross Street area as a priority as well as improving the appearance of the principal access points into the town centre (e.g. Metrolink station).

Stretford

Diversity of Uses

6.89 Stretford town centre largely comprises the Mall shopping centre, bringing stability to the shopping provision within Stretford in comparison to the other town centres within the borough, with the overall quantum of floorspace being only marginally less than originally set out in the 2001 Study.

Table 13 – Stretford Town Centre Floorspace

<table>
<thead>
<tr>
<th>Retail Sector</th>
<th>2000 Floorspace (sq. m)</th>
<th>2007 Floorspace (sq. m)</th>
<th>Floorspace Change (2000 - 2007) (sq. m)</th>
<th>No. of Units 2000</th>
<th>No. of Units 2007</th>
<th>Unit Change 2000 – 2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience</td>
<td>7,292</td>
<td>6,052</td>
<td>-1,240</td>
<td>14</td>
<td>13</td>
<td>-1</td>
</tr>
<tr>
<td>Comparison</td>
<td>17,180</td>
<td>17,480</td>
<td>+300</td>
<td>51</td>
<td>59</td>
<td>+9</td>
</tr>
<tr>
<td>Service</td>
<td>8,352</td>
<td>9,151</td>
<td>+799</td>
<td>26</td>
<td>29</td>
<td>+3</td>
</tr>
<tr>
<td>Vacant</td>
<td>4,077</td>
<td>2,929</td>
<td>-1,148</td>
<td>16</td>
<td>24</td>
<td>+8</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>1,607</td>
<td>1,214</td>
<td>-393</td>
<td>5</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>38,508</td>
<td>36,826</td>
<td>-1,682</td>
<td>112</td>
<td>130</td>
<td>+18</td>
</tr>
</tbody>
</table>
6.90 Convenience retail provision within the town centre has only decreased slightly whilst there has been a minimal change in the composition of the town centre with respect to comparison retail.

6.91 Whilst there has been some minor growth in non-retail floorspace within the town centre, the main change has been the provision of small market-style stalls which are occupied by local independent retailers. It is these small stalls that ‘skew’ the overall increase in the number of units within the town centre.

**Unit Composition**

6.92 In comparison to the 2001 Study, the table below highlights that there has been some structural changes in the unit composition of Stretford Town Centre

**Table 14 – Stretford Town Centre Composition**

<table>
<thead>
<tr>
<th></th>
<th>Units</th>
<th>Floorspace</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>%</td>
</tr>
<tr>
<td>Year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Convenience</td>
<td>2000</td>
<td>14</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>13</td>
</tr>
<tr>
<td>Comparison</td>
<td>2000</td>
<td>51</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>59</td>
</tr>
<tr>
<td>Service</td>
<td>2000</td>
<td>26</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>29</td>
</tr>
<tr>
<td>Vacant</td>
<td>2000</td>
<td>16</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>24</td>
</tr>
<tr>
<td>Miscellaneous (excl. Vacant)</td>
<td>2000</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>5</td>
</tr>
</tbody>
</table>

*Based on Trafford Council Town Centre Survey (as updated) and Experian Goad In-Centre Reports. May not add up due to rounding*

6.93 Comparison of the town centre survey results show that whilst the quantum of convenience floorspace was above the national average in the 2001 Study (18.9% against 16.4% nationally), it is now close (16.4% in comparison to 16.6%). With respect to the actual
number of units in convenience retail use, the two respective surveys both confirm that Stretford is slightly over-represented in relation to the Goad national average.

6.94 Non-retail service floorspace within the town centre has shown an increase of 3 units since the 2001 Study. The town centre however remains under-represented in the number of non-retail service units (22.3% against 32.4% nationally).

Use Class Composition

6.95 The following table sets out the use class composition in Stretford town centre, allowing for direct comparison with the 2001 Study.

Table 15 – Stretford Use Class Composition

<table>
<thead>
<tr>
<th>Use Class</th>
<th>Year</th>
<th>No. of Units</th>
<th>% of total number of units</th>
<th>Unit Trend (2000 – 2007)</th>
<th>Floorspace (m²)</th>
<th>% of total floorspace</th>
<th>Floorspace Trend (m²)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class A1</td>
<td>2000</td>
<td>81</td>
<td>72</td>
<td>+2</td>
<td>27,196</td>
<td>71</td>
<td>-1,884</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>83</td>
<td>63.8</td>
<td></td>
<td>25,312</td>
<td>68.73</td>
<td></td>
</tr>
<tr>
<td>Class A2</td>
<td>2000</td>
<td>11</td>
<td>10</td>
<td>+2</td>
<td>2,302</td>
<td>6</td>
<td>-60</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>13</td>
<td>10</td>
<td></td>
<td>2,242</td>
<td>6.09</td>
<td></td>
</tr>
<tr>
<td>Class A3 – A5</td>
<td>2000</td>
<td>2</td>
<td>2</td>
<td>+2</td>
<td>1,407</td>
<td>4</td>
<td>+452</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>4</td>
<td>3.07</td>
<td></td>
<td>1,859</td>
<td>5.05</td>
<td></td>
</tr>
<tr>
<td>Class B1</td>
<td>2000</td>
<td>1</td>
<td>1</td>
<td>+2</td>
<td>3,426</td>
<td>9</td>
<td>+250</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>3</td>
<td>2.01</td>
<td></td>
<td>3,676</td>
<td>9.98</td>
<td></td>
</tr>
<tr>
<td>Class D1</td>
<td>2000</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>100</td>
<td>0</td>
<td>+374</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>1</td>
<td>0.76</td>
<td></td>
<td>474</td>
<td>1.29</td>
<td></td>
</tr>
<tr>
<td>Vacant</td>
<td>2000</td>
<td>16</td>
<td>14</td>
<td>+8</td>
<td>4,077</td>
<td>11</td>
<td>+932</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>24</td>
<td>18.46</td>
<td></td>
<td>5,009</td>
<td>6.78</td>
<td></td>
</tr>
</tbody>
</table>

Based on Trafford Council Town Centre Surveys (2000 – 2007). Other floorspace (e.g. C3 residential dwellings) not shown in order to enable direct comparison. May not add up due to rounding. Class D2 (1 unit) and Sui Generis (2 Units) not shown.

6.96 The survey results highlight that the most significant change in the floorspace composition of Stretford town centre since the 2001 Study has been the decrease in Class A1 retail floorspace compared to increases in Class A3 – A5 floorspace, which is attributable to the McDonald’s unit and the increase in vacant floorspace which is detailed below.
Vacancies

6.97 In terms of vacancies, whilst the number of units vacant within the centre is above the Goad national average (18.4% against 10.2% nationally), the amount of floorspace is actually below the Goad average (7.95% against 8.63% nationally), suggesting that the existing vacant floorspace comprises small units, which could be amalgamated to provide larger floorplates.

Retailer Representation

6.98 Stretford Mall presently accommodates eleven of the twenty seven key national multiple retailers defined by Experian Goad as key attractors to a centre. These key retailers include Argos, Burton, Dorothy Perkins, Tesco and WH Smith.

6.99 In addition to the Goad key (attractor) retailer representation within Stretford, our assessment finds that there are presently 51 national multiple retailers within the town centre. This equates to 39.2% of the overall town centre provision and is significantly above the Goad national average of 33.9%. This is relatively positive given the ease of access from the town centre to larger higher order centres such as Manchester and The Trafford Centre.

Retailer Requirements

6.100 The Focus Retail Intelligence database presently holds 11 retailer requirements for Stretford, giving the centre a national ranking of 591. The historic trend data from Focus indicates that retailer requirements have remained relatively stable at around 10 to 15 requirements each year.

6.101 The main retailer requirements for Stretford, total c. 3,300 m², with the majority relating to lower order convenience retailers. However, given the relatively weak convenience market share it is likely that lower-order / discount convenience retailers would secure the necessary qualitative uplift required in order for Stretford to retain more expenditure from its primary catchment.

6.102 The comparison requirements are mainly made up of middle market comparison retailers. Clearly, the Council will have to work with the owners of Stretford Mall to understand future letting strategy and target retailers.
Shopping Rents

6.103 Prime shopping rents in Stretford town centre have risen from £50 per square foot in 1997 to £80 per square foot in 2007, which is significantly above the rental levels identified in the 2001 Study, when rental levels were in the region of £52 per square foot. These rents are above Sale town centre (£50 per square foot) although considerably below higher order centres such as Altrincham.

Commercial Yields

6.104 The latest Valuation Office (VOA) report into shopping centres shows that the confidence in Stretford has significantly decreased over the recent past. In April 1994, as proposals for The Trafford Centre were emerging, the prime retail yield was 8%. However, prior to The Trafford Centre opening (April 1997), investor confidence significantly declined to 9.50% and after The Trafford Centre had actually opened in September 1998, confidence decreased even further with the prime yield at c. 11%. The retail yield has subsequently stabilised at around 10% and encouragingly, investor confidence has begun to grow with yields of 8% in January 2006 and 7.75% in January 2007.

Pedestrian Flows

6.105 Whilst the relatively poor weather this summer may have impacted on overall pedestrian flows, pedestrian flows within the undercover Stretford Mall were moderately higher than the previous year. The survey results confirm that the busiest parts of Stretford town centre remain on Brody Street outside Bon Marche / Tesco Metro and on Kingsway outside Woolworths, which are the principal entry points into the mall from the main centre car park. The survey results also highlight that the quietest parts of Stretford town centre are on Chester Road outside the Market and the Job Centre.

Comparative Analysis – Benchmarking

6.106 *Experian* only ranked Stretford town centre nationally in the years 1998 and 2000. In 1998, Stretford was ranked as the 259th centre nationally, above Sale and 123 places below Altrincham. By 2000, the centre had improved its national ranking to 243rd, which was only 58 places below Macclesfield at the time.

6.107 With respect to *Venue Score*, Stretford was identified as a major district centre, with a ranking of 260th in 2005. This ranking is significantly above Sale (411) and Urmston (421). In 2006, Stretford had slightly slipped in the rankings to 277th, which is probably
attributable to quantitative and qualitative improvements in other centres than overriding
deficiencies in its retail offer.

**Qualitative Analysis**

6.108 The Stretford Town Centre Partnership comprises a variety of local stakeholders and is supported by Trafford Council. The Partnership considers that Stretford had a good variety of business and shopping facilities within Stretford Mall and that a majority of local residents shop locally. Transport links are considered good given that it is well served by both buses and the Metrolink and that the centre is within walking distance to many local residents. In addition given that the town centre occupies a prominent location at the junction of Chester Road and Kingsway, ease of access coupled with free and readily available car parking were also identified as a relative strength of Stretford town centre.

6.109 In terms of weaknesses, the main concerns of the Partnership relate to anti-social behaviour, the poor physical environment and the fact that the town centre is relatively detached from the local residential areas due to the main roads surrounding Stretford Mall. In retail terms, the lack of an evening economy was considered to be one of Stretford’s main weaknesses, which is unsurprising given that the Mall closes at night and that the leisure (evening economy) provision is limited to two public houses and a snooker hall. The lack of a high street or a focal point for the town centre is also identified as weaknesses as is the perceived lack of higher order retailers.

6.110 The Partnership believes therefore that significantly improving the townscape and physical environment is a major priority along with seeking to encourage existing retailers to open for longer so as to increase the evening economy. In addition, the Partnership considers that the diversification of the offer along Kingsway should be encouraged.
Urmston

Diversity of Uses

6.111 The current retail town centre composition is set out below.

Table 16 – Urmston Town Centre Floorspace

<table>
<thead>
<tr>
<th>Retail Sector</th>
<th>2000 Floorspace (sq. m)</th>
<th>2007 Floorspace (sq. m)</th>
<th>Floorspace Change (2000 - 2007) (sq. m)</th>
<th>No. of Units 2000</th>
<th>No. of Units 2007</th>
<th>Unit Change 2000 – 2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience</td>
<td>5,821</td>
<td>1,723</td>
<td>-4,098</td>
<td>23</td>
<td>10</td>
<td>-13</td>
</tr>
<tr>
<td>Comparison</td>
<td>15,917</td>
<td>9,335</td>
<td>-6,582</td>
<td>68</td>
<td>57</td>
<td>-11</td>
</tr>
<tr>
<td>Service</td>
<td>10,372</td>
<td>11,599</td>
<td>+1,227</td>
<td>84</td>
<td>98</td>
<td>+14</td>
</tr>
<tr>
<td>Vacant</td>
<td>1,718</td>
<td>5,900</td>
<td>+4,182</td>
<td>13</td>
<td>36</td>
<td>+23</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>3,218</td>
<td>3,362</td>
<td>+144</td>
<td>7</td>
<td>7</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>37,046</strong></td>
<td><strong>31,919</strong></td>
<td><strong>-5,127</strong></td>
<td><strong>195</strong></td>
<td><strong>208</strong></td>
<td><strong>+13</strong></td>
</tr>
</tbody>
</table>

Source: Trafford Council In-Centre Surveys (based on actual UDP defined town centre boundaries) (may not add up due to rounding)

6.112 Given that several retail units within the primary shopping area (e.g. the existing shopping precinct) have been vacated in advance of comprehensive redevelopment, it is unsurprising that there has been a significant decrease in quantum of convenience and comparison floorspace within the town centre in comparison to the 2001 Retail Study figures (2000 survey). This is allied to a significant increase in number of vacant units and vacant floorspace within the centre.

6.113 However, notwithstanding the present changes within the town centre, the centre survey results show that there has been a significant growth in non-retail service provision within the town, both in terms of floorspace and the number of units.

Unit Composition

6.114 On the basis of the town centre changes detailed above, it is unsurprising that the convenience and comparison retail representation within Urmston town centre is significantly below the Goad national averages for both the quantum of floorspace and also the number of units.
### Table 17 – Urmston Town Centre Composition

<table>
<thead>
<tr>
<th></th>
<th>Units</th>
<th></th>
<th>Floorspace</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Year</td>
<td>Number</td>
<td>%</td>
<td>% GB Average</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>10</td>
<td>4.81</td>
<td>9.09</td>
</tr>
<tr>
<td>Comparison</td>
<td>2000</td>
<td>68</td>
<td>34.87</td>
<td>49.73</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>57</td>
<td>27.40</td>
<td>46.85</td>
</tr>
<tr>
<td>Service</td>
<td>2000</td>
<td>84</td>
<td>43.08</td>
<td>27.81</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>98</td>
<td>47.12</td>
<td>32.42</td>
</tr>
<tr>
<td>Vacant</td>
<td>2000</td>
<td>13</td>
<td>6.67</td>
<td>11.81</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>36</td>
<td>17.31</td>
<td>10.29</td>
</tr>
<tr>
<td>Miscellaneous (excl. Vacant)</td>
<td>2000</td>
<td>7</td>
<td>3.59</td>
<td>12.92</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>7</td>
<td>3.37</td>
<td>1.35</td>
</tr>
</tbody>
</table>

Based on Trafford Council Town Centre Survey (as updated) and Experian Goad In-Centre Reports. May not add up due to rounding.

6.115 In comparison to the Goad national averages, it is clear to see that whilst Urmston had a convenience retail provision above the respective national averages for the number of units and quantum of floorspace in 2001, the closure of the existing Somerfield store on Moorfield Walk in advance of redevelopment has meant that the convenience retail offer in Urmston now is significantly less than the national average (5.3% in comparison to 16.6% nationally).

6.116 This under-representation is also mirrored in comparison retail provision, which whilst already below the Goad national averages in 2001 in relation to both the number of units and the quantum of floorspace, has now decreased further in relation to the 2007 Goad averages.

6.117 The significant rise in non-retail service provision since the 2001 Study is also reflected in the fact that the number of units dedicated to non-retail uses is significantly above the national average (47.1% in comparison to 32.4% nationally) and that the quantum of floorspace is c. 15% above the national average. However, the apparent over-presentation of non-retail services (both in terms of unit numbers and floorspace) within
Urmston town centre was also highlighted in the 2001 Study when comparing against national averages.

**Vacancies**

6.118 It is very difficult to accurately assess the level of vacancies within Urmston town centre at present; although an assessment of the 2001 Study finds that Urmston was a relatively viable centre with a lower proportion of vacant units and floorspace in comparison to the national average. This is reaffirmed through the retail statement which supported the Ask planning application for the Urmston town centre redevelopment, which found on the basis of an Experian Goad survey (December 2005) that 10.2% of floorspace was vacant in comparison to a national average of 7.9%.

6.119 With respect to the existing vacancy levels, we understand that c. 3,983 m$^2$ (gross) of floorspace presently vacant within Moorfield Walk were previously occupied by retailers and we anticipate that once the town centre redevelopment is brought forward then the present vacancy rate will fall to around or possibly below the respective Goad national averages.

**Use Class Composition**

6.120 The following table highlights the changes in the composition of Urmston town centre with respect to specific use class.

**Table 18 – Urmston Use Class Composition**

<table>
<thead>
<tr>
<th>Use Class</th>
<th>Year</th>
<th>No. of Units</th>
<th>% of total number of units</th>
<th>Unit Trend (2000 – 2007)</th>
<th>Floorspace (m$^2$)</th>
<th>% of total floorspace</th>
<th>Floorspace Trend (m$^2$)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class A1</td>
<td>2000</td>
<td>109</td>
<td>56</td>
<td>-10</td>
<td>22,693</td>
<td>61</td>
<td>-9,361</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>99</td>
<td>47.6</td>
<td></td>
<td>13,332</td>
<td>41.77</td>
<td></td>
</tr>
<tr>
<td>Class A2</td>
<td>2000</td>
<td>35</td>
<td>18</td>
<td>-8</td>
<td>5,025</td>
<td>14</td>
<td>-2,181</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>27</td>
<td>12.98</td>
<td></td>
<td>3,024</td>
<td>9.47</td>
<td></td>
</tr>
<tr>
<td>Class A3 – A5</td>
<td>2000</td>
<td>24</td>
<td>12</td>
<td>+6</td>
<td>4,329</td>
<td>12</td>
<td>+1,094</td>
</tr>
<tr>
<td>Class B1</td>
<td>2000</td>
<td>2</td>
<td>1</td>
<td>+4</td>
<td>754</td>
<td>2</td>
<td>+420</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>6</td>
<td>2.88</td>
<td></td>
<td>1,174</td>
<td>3.68</td>
<td></td>
</tr>
</tbody>
</table>
Based on Trafford Council Town Centre Surveys (2000 – 2007). Other floorspace (e.g. C3 residential dwellings) not shown in order to enable direct comparison. May not add up due to rounding.

6.121 Notwithstanding the expected changes in convenience, comparison and vacant floorspace within the town centre, one of the main changes since the 2001 Study has been the increase in A3 – A5 (bar / restaurant) uses, with the number of units increasing by 6 units or c. 1,100 m$^2$ (gross) of floorspace.

**Retailer Representation**

6.122 Goad presently identifies 2 key retailers within the town centre (Woolworth’s and Boots). In terms of multiple retailer representation, there are presently 30 units occupied by multiple retailers (e.g. part of a network of nine or more outlets). This equates to 14.4% of the total number of units (208) within the town centre, which is significantly less than the Goad national average of 33.9%.

6.123 Whilst there are a relatively low number of key and national multiple retailers represented in Urmston at present, we consider that the town centre redevelopment will significantly increase the number of key and multiple retailers to the town centre with retailers such as Sainsbury’s for example already committing to the scheme.

**Retailer Requirements**

6.124 The *Focus database* has 10 recorded retailer requirements for Urmston at present, which is a significant increase on requirements at the start of the decade when there were only two published retailer requirements.

6.125 We anticipate that the Ask town centre redevelopment scheme will largely meet the retailer requirements for Urmston in the short to medium term and with Sainsbury’s already signed
up to anchor the new foodstore as part of the wider development, we expect that other national multiple retailers will commit to the scheme in due course.

6.126 In terms of present retailer requirements, we understand that there is an outstanding requirement from Quality Save (Home Bargains), which would add to the town centre bulky goods offer as well as for an Iceland store, which would potentially complement the planned Sainsbury’s store.

**Shopping Rents**

6.127 Retail rents on the primary shop frontages in Urmston have remained relatively stable over the past decade with only a minimal increase from £25 per square foot in 1997 to £30 per square foot in 2007, which is comparable to the rental levels identified in the 2001 study. However, given the supply of new modern retail floorspace coming forward through the town centre redevelopment, we anticipate that the rental levels for the prime retail frontages in Urmston will increase in the short to medium term.

**Commercial Yields**

6.128 There is no official data on commercial yields in Urmston given that there have been very few retail transactions which have taken place recently. However, given the position of the centre within the sub-regional retail hierarchy and its current relatively localised provision, we consider that commercial yields in Urmston would be around the yield established for Sale and Stretford (c. 8 – 10%).

**Pedestrian Flows**

6.129 Overall, the pedestrian flows in Urmston were lower than the previous year. This is likely due to the forthcoming redevelopment of the shopping precinct which has resulted in several areas of existing car parking being fenced off in addition to the vacation of a significant number of retail units along the Moorfield Walk.

6.130 The footfall survey results indicate that the busiest area of pedestrian flow in Urmston was focussed along Flixton Road (outside the Abbey), which is near to the train station and the majority of non-retail service outlets. Moorfield Walk, despite the ongoing changes, is still the second busiest part of the town centre for pedestrians in the town centre given the access to the car parks to the rear of the shopping precinct.
Comparative Analysis – Benchmarking

6.131 Urmston was not classified in the Experian Goad national retail rankings. However, Venue Score did rank Urmston as 421st in its national rankings in 2005, which was below the other main town centres in Trafford. The respective retail rankings for 2006 indicate that Urmston has improved its national standing by 57 places to 364th, ahead of Sale town centre. We anticipate that the new retail floorspace being brought forward will considerably improve the town’s national ranking.

Qualitative Analysis

6.132 The Urmston Partnerships, a group of local stakeholders, consider the strengths of the town to be excellent transport links, the variety of local shops and services within the town centre and that it retains the feeling of a village environment with an attractive townscape.

6.133 The proximity of Urmston to The Trafford Centre is acknowledged as a significant weakness (or threat); the present state of transition within the town centre is also of concerns, in respect of the lack of retail provision within the town and that the vacation of the main shopping area has created significant environmental and anti-social behaviour problems.

6.134 The Partnership considers that the attraction of independent as well as mainstream national retailers is required so as to improve Urmston’s town centre offer and enable it to attract local residents presently going elsewhere to meet their shopping needs. Quick progress on the town centre redevelopment in terms of securing the site, improving the physical environment and minimising the potential for anti-social behaviour are also seen as short-term priorities for improvement.

Hale

6.135 Given the size of the centre and the present role it assumes within the local retail hierarchy, there is limited benchmark data available in which to fully inform and complete a comprehensive health-check exercise.

6.136 Therefore, our health-check assessment for Hale (and the other district centres) primarily focuses on the present retail composition within the centre and how this has changed since the 2001 Study.
## Diversity of Uses

### Table 19 – Hale District Centre Floorspace

<table>
<thead>
<tr>
<th>Retail Sector</th>
<th>2000 Floorspace (sq. m)</th>
<th>2007 Floorspace (sq. m)</th>
<th>Floorspace Change (2000 - 2007) (sq. m)</th>
<th>No. of Units 2000</th>
<th>No. of Units 2007</th>
<th>Unit Change 2000 – 2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience</td>
<td>2,427</td>
<td>2,126</td>
<td>-301</td>
<td>14</td>
<td>13</td>
<td>-1</td>
</tr>
<tr>
<td>Comparison</td>
<td>3,358</td>
<td>3,005</td>
<td>-353</td>
<td>39</td>
<td>38</td>
<td>0</td>
</tr>
<tr>
<td>Service</td>
<td>6,044</td>
<td>6,539</td>
<td>+496</td>
<td>76</td>
<td>70</td>
<td>-6</td>
</tr>
<tr>
<td>Vacant</td>
<td>520</td>
<td>479</td>
<td>-41</td>
<td>7</td>
<td>7</td>
<td>0</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>256</td>
<td>905</td>
<td>+649</td>
<td>6</td>
<td>3</td>
<td>-3</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>12,605</strong></td>
<td><strong>13,054</strong></td>
<td><strong>449</strong></td>
<td><strong>142</strong></td>
<td><strong>132</strong></td>
<td><strong>-10</strong></td>
</tr>
</tbody>
</table>

Source: Trafford Council In-Centre Surveys (based on actual UDP defined town centre boundaries) (may not add up due to rounding)

### 6.137
Comparison with the 2001 Study shows that the retail composition of the centre has remained relatively stable over recent years. Notwithstanding the recent opening of a Tesco Express and organic foodstore on Ashley Road, it is evident that there has been a small decrease in both convenience and comparison provision.

### 6.138
Whilst this may be attributable to the increase in non-retail service and miscellaneous floorspace within the centre, it is more than likely that the changes in convenience and comparison floorspace reflect the natural cycle of change in the retail composition of smaller centres such as Hale.

### Unit Composition

### 6.139
Whilst caution should be used in comparing the floorspace composition of a district centre to Goad national averages given that these are predominantly based on larger town centres across the UK, benchmarking provides a useful indication as to the relative health of the centre.
### Table 19 – Hale District Centre Floorspace Composition

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
<th>%</th>
<th>% GB Average</th>
<th>Quantum of Floorspace</th>
<th>%</th>
<th>% GB Average</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Convenience</strong></td>
<td><strong>2000</strong></td>
<td>14</td>
<td>9.86</td>
<td>9.53</td>
<td>2,427</td>
<td>19.25</td>
</tr>
<tr>
<td></td>
<td><strong>2007</strong></td>
<td>13</td>
<td>9.85</td>
<td>9.09</td>
<td>2,126</td>
<td>15.92</td>
</tr>
<tr>
<td><strong>Comparison</strong></td>
<td><strong>2000</strong></td>
<td>39</td>
<td>27.46</td>
<td>49.73</td>
<td>3,358</td>
<td>26.64</td>
</tr>
<tr>
<td></td>
<td><strong>2007</strong></td>
<td>39</td>
<td>29.55</td>
<td>48.65</td>
<td>3,005</td>
<td>22.5</td>
</tr>
<tr>
<td><strong>Service</strong></td>
<td><strong>2000</strong></td>
<td>76</td>
<td>53.52</td>
<td>27.81</td>
<td>6,044</td>
<td>47.95</td>
</tr>
<tr>
<td></td>
<td><strong>2007</strong></td>
<td>70</td>
<td>53.03</td>
<td>32.42</td>
<td>6,539</td>
<td>48.96</td>
</tr>
<tr>
<td><strong>Vacant</strong></td>
<td><strong>2000</strong></td>
<td>7</td>
<td>4.93</td>
<td>11.61</td>
<td>520</td>
<td>4.13</td>
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<tr>
<td></td>
<td><strong>2007</strong></td>
<td>7</td>
<td>5.30</td>
<td>11.61</td>
<td>779</td>
<td>5.83</td>
</tr>
<tr>
<td><strong>Miscellaneous (excl. Vacant)</strong></td>
<td><strong>2000</strong></td>
<td>6</td>
<td>4.23</td>
<td>12.92</td>
<td>256</td>
<td>2.03</td>
</tr>
<tr>
<td></td>
<td><strong>2007</strong></td>
<td>3</td>
<td>2.27</td>
<td>1.35</td>
<td>905</td>
<td>6.77</td>
</tr>
</tbody>
</table>

*Based on Trafford Council Town Centre Survey (as updated) and Experian Goad In-Centre Reports. May not add up due to rounding*

6.140 The survey results highlight that whilst the number of convenience retail outlets within Hale district centre is in line with the Goad national benchmarks for both 2000 and 2007, the quantum of convenience floorspace has gone from being over the national average (19.2% against 14.3% nationally) in 2000 to slightly under the national average in 2007 (15.9% against 16.6% nationally). This suggests that the convenience floorspace within Hale is smaller in size / configuration than the national average, although given the secondary role Hale plays in the local retail hierarchy we do not consider the slight under-provision to be significant or an acute indication of need. We will however assess the potential for Hale to accommodate new convenience floorspace in the area specific assessment later in this report.

6.141 With respect to comparison retail, given that the Goad national average benchmarks are based on large town centres, it is unsurprising that the number of units and quantum of retail floorspace is significantly below the respective national averages. In addition, given its predominantly local service role in the retail hierarchy, it is clear that in comparison to the Goad national averages, Hale has a significant over-representation of both non-retail
service units and the quantum of floorspace dedicated to such uses within the district centre.

**Vacancies**

6.142 An important indicator of the vitality of a centre is the number of vacancies within the centre. As the comparative survey data shows, Hale is a highly viable district centre with a significantly low number of vacancies (c. 5.83% in floorspace terms), which compares with the Goad national average of 8.63% in 2007. The relative strength of Hale district centre is explained by the particularly affluent catchment it serves.

**Use Class Composition**

6.143 The current use class composition of the centre in comparison to 2001 is set out below:

**Table 20 – Hale District Centre Use Class Composition**

<table>
<thead>
<tr>
<th>Use Class</th>
<th>Year</th>
<th>No. of Units</th>
<th>% of total number of units</th>
<th>Unit Trend (2000 – 2007)</th>
<th>Floorspace (m²)</th>
<th>% of total floorspace</th>
<th>Floorspace Trend (m²)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class A1</td>
<td>2000</td>
<td>71</td>
<td>50</td>
<td>-1</td>
<td>6,564</td>
<td>53</td>
<td>-58</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>70</td>
<td>53.03</td>
<td></td>
<td>6,506</td>
<td>49.83</td>
<td></td>
</tr>
<tr>
<td>Class A2</td>
<td>2000</td>
<td>33</td>
<td>23</td>
<td>-8</td>
<td>2,515</td>
<td>20</td>
<td>-328</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>25</td>
<td>18.94</td>
<td></td>
<td>2,187</td>
<td>16.75</td>
<td></td>
</tr>
<tr>
<td>Class A3 – A5</td>
<td>2000</td>
<td>18</td>
<td>13</td>
<td>+3</td>
<td>1,706</td>
<td>14</td>
<td>+1,047</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>21</td>
<td>15.91</td>
<td></td>
<td>2,753</td>
<td>21.08</td>
<td></td>
</tr>
<tr>
<td>Class B1</td>
<td>2000</td>
<td>3</td>
<td>2</td>
<td>+1</td>
<td>125</td>
<td>1</td>
<td>+25</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>4</td>
<td>3.03</td>
<td></td>
<td>150</td>
<td>1.14</td>
<td></td>
</tr>
<tr>
<td>Class D1</td>
<td>2000</td>
<td>4</td>
<td>3</td>
<td>-1</td>
<td>152</td>
<td>1</td>
<td>+74</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>3</td>
<td>2.27</td>
<td></td>
<td>226</td>
<td>1.73</td>
<td></td>
</tr>
<tr>
<td>Class D2</td>
<td>2000</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>300</td>
<td>2</td>
<td>+429</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>1</td>
<td>0.76</td>
<td></td>
<td>729</td>
<td>5.58</td>
<td></td>
</tr>
<tr>
<td>Sui Generis</td>
<td>2000</td>
<td>2</td>
<td>1</td>
<td>-1</td>
<td>170</td>
<td>1</td>
<td>-146</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>1</td>
<td>0.76</td>
<td></td>
<td>24</td>
<td>0.18</td>
<td></td>
</tr>
<tr>
<td><strong>Vacant</strong></td>
<td>2000</td>
<td>6</td>
<td>4</td>
<td>+1</td>
<td>430</td>
<td>3</td>
<td>+49</td>
</tr>
</tbody>
</table>
The survey results suggest that whilst there has been a significant increase in Class D2 use within the district centre, the main change has been an increase of c. 1,047 m² (gross) in Class A3 – A5 (bar and restaurant) uses. This may raise the need to monitor further significant changes in the retail composition and consider a more specific criteria-based policy than the present adopted UDP policy.

### Retailer Representation

Hale does not accommodate any of the 27 retailers defined by Experian Goad as key retail attractors; it does however support 15 national multiple retailers including Tesco Express, all the major banks and branches of restaurant chains such as La Vina and Pizza Express. This representation of national multiple retailers is equivalent to 11.3% of the overall district centre floorspace, which compares with 33.9% nationally.

### Retailer Requirements

There are no published requirements for Hale. However we understand that there is specific interest in Hale from the Piccolinos restaurant chain (planning application submitted for the conversion of premises just outside of the district centre) and also from the Ask pizza restaurant chain, although we understand that Pizza Express, which already has a restaurant within Hale, is in the process of purchasing the Ask chain building on the existing A3/A4/A5 strength of the centre.

It terms of appropriate retail targets, as the area specific assessment will set out later in this report, there is a quantitative and qualitative deficiency in the convenience retail offer within the district centre and higher order retailers such as Booth’s or Waitrose (notwithstanding the outcome of the Hale Barns public inquiry) would be appropriate retailers for Hale district centre given its catchment profile.

### Sale Moor

Sale Moor is the smallest district centre in the Borough in quantitative terms and its retail provision focuses on local independent shops.
Table 21 – Sale Moor District Centre Floorspace

<table>
<thead>
<tr>
<th>Retail Sector</th>
<th>2000 Floorspace (sq. m)</th>
<th>2007 Floorspace (sq. m)</th>
<th>Floorspace Change (2000 - 2007) (sq. m)</th>
<th>No. of Units 2000</th>
<th>No. of Units 2007</th>
<th>Unit Change 2000 – 2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience</td>
<td>1,225</td>
<td>831</td>
<td>-394</td>
<td>14</td>
<td>11</td>
<td>-3</td>
</tr>
<tr>
<td>Comparison</td>
<td>1,412</td>
<td>1,081</td>
<td>-331</td>
<td>20</td>
<td>15</td>
<td>-5</td>
</tr>
<tr>
<td>Service</td>
<td>2,574</td>
<td>3,469</td>
<td>+895</td>
<td>38</td>
<td>40</td>
<td>+2</td>
</tr>
<tr>
<td>Vacant</td>
<td>509</td>
<td>30</td>
<td>-479</td>
<td>7</td>
<td>1</td>
<td>-6</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>680</td>
<td>140</td>
<td>-540</td>
<td>3</td>
<td>2</td>
<td>-1</td>
</tr>
<tr>
<td>Total</td>
<td>6,400</td>
<td>5,551</td>
<td>-849</td>
<td>82</td>
<td>69</td>
<td>-13</td>
</tr>
</tbody>
</table>

Source: Trafford Council In-Centre Surveys (based on actual UDP defined town centre boundaries) (may not add up due to rounding)

6.149 The table above shows that the retail composition within the district centre has remained relatively the same with the only main changes in floorspace being attributable to the re-measurement of the survey base by the Council since the 2001 Study and also the significant increase in non-retail service provision within the centre. As with Hale, the convenience retail provision is small-scale (175 m² gross Spar store) and is not generally reflective of a district centre.

Unit Composition

6.150 The retail composition within Sale Moor is as follows:

Table 22 – Sale Moor District Centre Composition

<table>
<thead>
<tr>
<th>Year</th>
<th>Units</th>
<th>Floorspace</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Number</td>
<td>%</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>11</td>
</tr>
<tr>
<td>Comparison</td>
<td>2000</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>15</td>
</tr>
<tr>
<td>Service</td>
<td>2000</td>
<td>38</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>40</td>
</tr>
<tr>
<td>Vacant</td>
<td>2000</td>
<td>7</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>1</td>
</tr>
</tbody>
</table>
The results of the respective surveys against the Goad national averages highlight the under-provision of convenience and comparison retail units and floorspace; the predominantly service role and the over-provision of non-retail floorspace relative to national averages. This is all in keeping with its role and function within the retail hierarchy.

**Vacancies**

There was only one unit vacant at the time of our centre survey (July 2007). Notwithstanding the deficiencies in the centre retail offer, which we will address later in the area specific assessment, it is clear that Sale Moor is a viable centre.

**Use Class Composition**

The current use class composition within the district centre at present against the 2001 Study is set out below.

**Table 23 – Sale Moor Use Class Composition**

<table>
<thead>
<tr>
<th>Use Class</th>
<th>Year</th>
<th>No. of Units</th>
<th>% of total number of units</th>
<th>Unit Trend (2000 – 2007)</th>
<th>Floorspace (m²)</th>
<th>% of total floorspace</th>
<th>Floorspace Trend (m²)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class A1</td>
<td>2000</td>
<td>42</td>
<td>51</td>
<td>-7</td>
<td>2,999</td>
<td>47</td>
<td>-478</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>35</td>
<td>50.72</td>
<td></td>
<td>2,521</td>
<td>8.25</td>
<td></td>
</tr>
<tr>
<td>Class A2</td>
<td>2000</td>
<td>10</td>
<td>12</td>
<td>-7</td>
<td>771</td>
<td>12</td>
<td>-313</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>5</td>
<td>7.25</td>
<td></td>
<td>458</td>
<td>8.25</td>
<td></td>
</tr>
<tr>
<td>Class A3 – A5</td>
<td>2000</td>
<td>9</td>
<td>11</td>
<td>+4</td>
<td>1,070</td>
<td>17</td>
<td>+225</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>13</td>
<td>18.84</td>
<td></td>
<td>1,295</td>
<td>23.33</td>
<td></td>
</tr>
<tr>
<td>Class B1</td>
<td>2000</td>
<td>3</td>
<td>4</td>
<td>+2</td>
<td>170</td>
<td>3</td>
<td>+390</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>5</td>
<td>7.25</td>
<td></td>
<td>560</td>
<td>10.09</td>
<td></td>
</tr>
<tr>
<td>Class D1</td>
<td>2000</td>
<td>3</td>
<td>4</td>
<td>-1</td>
<td>233</td>
<td>4</td>
<td>-78</td>
</tr>
</tbody>
</table>

*Based on Trafford Council Town Centre Survey (as updated) and Experian Goad In-Centre Reports. May not add up due to rounding*
6.154 **Review of the survey results** shows that the main decrease in use class floorspace has been in the Class A1 (retail) and Class A2 (professional services), with the main increases being within Class A3 – A5 uses.

### Retailer Representation

6.155 Sale Moor does not accommodate any of the 27 retailers defined by Experian Goad as key retail attractors. With respect to multiple retailers, Sale Moor has nine multiple retailers within the centre, although several of these are bookmakers such as William Hill. The representation of national multiple retailers is 13% of the overall district centre floorspace, which compares with 33.9% nationally.

### Retailer Requirements

6.156 There are no published retailer requirements for Sale Moor but given the deficiencies in the district centre convenience retail offer, as detailed in the area specific assessment later in this report, we consider that convenience retailers operating small-scale top-up formats such as Sainsbury Local / Tesco Express would be appropriate for the centre and would deliver a significant uplift in the quantitative and qualitative convenience retail offer to meet locally arising need.

### Timperley

6.157 Timperley shares many of the same characteristics as Sale Moor in terms of its size and its existing retail provision. It does however have a smaller non-retail service offer, as reflected in the table below.
Table 24 – Timperley District Centre Floorspace

<table>
<thead>
<tr>
<th>Retail Sector</th>
<th>2000 Floorspace (sq. m)</th>
<th>2007 Floorspace (sq. m)</th>
<th>Floorspace Change (2000 - 2007) (sq. m)</th>
<th>No. of Units 2000</th>
<th>No. of Units 2007</th>
<th>Unit Change 2000 – 2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience</td>
<td>1,770</td>
<td>2,120</td>
<td>+350</td>
<td>11</td>
<td>10</td>
<td>-1</td>
</tr>
<tr>
<td>Comparison</td>
<td>1,356</td>
<td>852</td>
<td>-504</td>
<td>24</td>
<td>15</td>
<td>-9</td>
</tr>
<tr>
<td>Service</td>
<td>1,801</td>
<td>1,934</td>
<td>+133</td>
<td>28</td>
<td>27</td>
<td>-1</td>
</tr>
<tr>
<td>Vacant</td>
<td>96</td>
<td>502</td>
<td>+406</td>
<td>1</td>
<td>9</td>
<td>+8</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>123</td>
<td>639</td>
<td>+516</td>
<td>2</td>
<td>5</td>
<td>+3</td>
</tr>
<tr>
<td>Total</td>
<td>5,146</td>
<td>6,047</td>
<td>+901</td>
<td>66</td>
<td>66</td>
<td>0</td>
</tr>
</tbody>
</table>

Source: Trafford Council In-Centre Surveys (based on actual UDP defined town centre boundaries) (may not add up due to rounding)

6.158 The table above shows that the district centre has slightly grown since the 2001 Study, which is probably mainly attributable to the re-measurement of the survey base by the Council in accordance with Experian Goad measurement conventions.

6.159 Within, this overall increase in floorspace there has been a minor increase in convenience provision, a decrease in comparison provision and the significant increase in non-retail floorspace within the centre. With the number of units not decreasing, it is probable that smaller comparison retail units in particular have been amalgamated to provide larger floorplates for non-retail service occupiers.

Unit Composition

6.160 The retail composition within Timperley is set out in the table below to enable comparison with the 2001 Study.

Table 25 – Timperley District Centre Composition

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
<th>%</th>
<th>% GB Average</th>
<th>Quantum of Floorspace</th>
<th>%</th>
<th>% GB Average</th>
</tr>
</thead>
</table>
| Convenience
| 2000  | 11     | 16.67 | 9.53 | 1,770 | 34.40 | 14.35 |
| 2007  | 10     | 15.15 | 9.09 | 2,120 | 35.17 | 16.69 |
| Comparison
| 2000  | 24     | 36.36 | 49.73 | 1,356 | 26.25 | 54.40 |
| 2007  | 15     | 22.73 | 46.85 | 832  | 13.8  | 52.32 |
| Service
| 2000  | 28     | 42.42 | 27.81 | 1,801 | 35    | 20.39 |
6.161 Detailed comparison of the survey results show that the number of units and quantum of floorspace dedicated to convenience retail within the district centre is significantly in excess of the Goad national centre average. This is opposite to comparison retail provision which is significantly under-represented in terms of both units and floorspace in relation to the wider district centre. As with the other district centres in the Borough, there is a significant over-representation of service floorspace.

**Vacancies**

6.162 Vacancy rates are relatively unchanged from the 2001 Study.

**Use Class Composition**

6.163 We have compared the use class composition within the district centre at present against the 2001 Study.

**Table 26 – Timperley Use Class Composition**

<table>
<thead>
<tr>
<th>Use Class</th>
<th>Year</th>
<th>No. of Units</th>
<th>% of total number of units</th>
<th>Unit Trend (2000 – 2007)</th>
<th>Floorspace (m²)</th>
<th>% of total floorspace</th>
<th>Floorspace Trend (m²)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class A1</td>
<td>2000</td>
<td>42</td>
<td>64</td>
<td>-6</td>
<td>3,575</td>
<td>69</td>
<td>+14</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>36</td>
<td>54.55</td>
<td></td>
<td>3,589</td>
<td>59.35</td>
<td></td>
</tr>
<tr>
<td>Class A2</td>
<td>2000</td>
<td>11</td>
<td>17</td>
<td>-6</td>
<td>790</td>
<td>15</td>
<td>-365</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>5</td>
<td>7.58</td>
<td></td>
<td>425</td>
<td>7.03</td>
<td></td>
</tr>
<tr>
<td>Class A3 – A5</td>
<td>2000</td>
<td>9</td>
<td>14</td>
<td>+1</td>
<td>558</td>
<td>11</td>
<td>+275</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>10</td>
<td>15.15</td>
<td></td>
<td>833</td>
<td>13.78</td>
<td></td>
</tr>
<tr>
<td>Sui Generis</td>
<td>2000</td>
<td>3</td>
<td>5</td>
<td>-1</td>
<td>175</td>
<td>3</td>
<td>-55</td>
</tr>
</tbody>
</table>
6.164 The table above shows that there has been a significant decrease in the number of class A2 occupiers within the centre whilst a significant increase in vacant units. As previously set out in relation to Hale, the Council should carefully monitor the changing composition of the district centre so as to ensure that it does not have an over-concentration of A3 – A5 uses which can potentially detract from the viability of a centre and also impact on residential amenity.

### Retailer Representation

6.165 Timperley does not accommodate any of the 27 retailers defined by Experian Goad as key retail attractors. With respect to multiple retailers, Sale Moor has eleven retailers within the centre, with the most prominent being the two Co-Op convenience stores and Iceland. There are also several national banks / building societies as well as bookmakers within the district centre.

### Retailer Requirements

6.166 There are no published retailer requirements for Timperley but given the deficiencies in the district centre convenience retail offer, as detailed in the area specific assessment later in this report, we consider that convenience retailers operating small-scale convenience top-up formats such as Sainsbury Local / Tesco Express would be appropriate for the centre and would deliver a significant uplift in the quantitative and qualitative convenience retail offer to meet locally arising need.

### Partington

6.167 As we will address later in the area-specific assessment for Partington, given the planned redevelopment of the local centre as part of a wider regeneration initiative, the majority of retail units within the centre are vacant at present and in its current state, the local centre is under performing. This is shown in the changes in the composition of the local centre since the 2001 Study.
6.168 The main changes in the floorspace composition relate to the significant decrease in the proportion of convenience retail floorspace within the local centre and the significant increase in vacant units. Whilst the Co-Op store is still trading within Partington, convenience retailers such as Victoria Wine, a frozen foods freezer centre and an independent bakery have closed since the 2001 Study. With respect to comparison retailing, Partington has a limited offer further undermined by the closure of several local shops since 2001.

Unit Composition

6.169 The retail composition within Partington, compared against the 2001 Study below.

Table 28 – Partington Local Centre Composition

<table>
<thead>
<tr>
<th>Year</th>
<th>Number</th>
<th>%</th>
<th>% GB Average</th>
<th>Quantum of Floorspace</th>
<th>%</th>
<th>% GB Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience</td>
<td>2000</td>
<td>7</td>
<td>26.92</td>
<td>9.53</td>
<td>1,427</td>
<td>54.9</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>10</td>
<td>15.15</td>
<td>9.09</td>
<td>851</td>
<td>36.19</td>
</tr>
<tr>
<td>Comparison</td>
<td>2000</td>
<td>3</td>
<td>11.53</td>
<td>49.73</td>
<td>110</td>
<td>4.23</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>15</td>
<td>22.73</td>
<td>46.85</td>
<td>60</td>
<td>2.55</td>
</tr>
<tr>
<td>Service</td>
<td>2000</td>
<td>7</td>
<td>26.92</td>
<td>27.81</td>
<td>520</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>2007</td>
<td>27</td>
<td>40.91</td>
<td>32.42</td>
<td>480</td>
<td>20.41</td>
</tr>
<tr>
<td>Vacant</td>
<td>2000</td>
<td>9</td>
<td>34.61</td>
<td>11.61</td>
<td>480</td>
<td>18.48</td>
</tr>
</tbody>
</table>
Based on Trafford Council Town Centre Survey (as updated) and Experian Goad In-Centre Reports. May not add up due to rounding

<table>
<thead>
<tr>
<th>Year</th>
<th>Units</th>
<th>Floorspace</th>
<th>Retail Floorspace</th>
<th>Vacancies</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>9</td>
<td>13.64</td>
<td>10.29</td>
<td>960</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>40.8</td>
<td>8.63</td>
</tr>
</tbody>
</table>

6.170 The survey results show that the number of units and quantum of floorspace dedicated to convenience retail within the centre is significantly in excess of the Goad national centre average. The quantum of service floorspace is slightly below the 2007 Goad national average (20.4% against 21.2% nationally).

**Vacancies**

6.171 The survey results show the level of vacancies within the local centre at present significantly exceeds the Goad national average (40.8% against 8.6% nationally) pointing to the fact that Partington is a failing local centre and is not viable in its current form. It is not meeting locally arising need and on the basis of the current composition of the centre, there is an overriding qualitative need for the provision of new retail facilities. We explore the future options for Partington in an area specific assessment later in this report.

**Use Class Composition**

6.172 Given the identified deficiencies in the local centre offer in Partington, it is not appropriate to assess the changing use class composition of the centre given the level of vacancies within the centre at present.

**Retailer Representation**

6.173 With respect to multiple national retailers, our survey has found that Partington has four retailers within the centre (Co-Op, McColls Newsagent, Hampson's Bakery and the Royal Bank of Scotland). Given the existing state of the centre, until appropriate development proposals come forward, it is important that Partington retains such retailers.

**Retailer Requirements**

6.174 There is one published retailer requirement (Focus database) for a Jack Heron freezer foodstore, although this may be a borough wide requirement given that the retailer also has outstanding requirements in Altrincham, Sale and Urmston.

6.175 We understand that the existing owners of the local centre are presently progressing within redevelopment plans for Partington, which will include the provision of a new foodstore.
We understand that the new foodstore provision is to be specifically targeted at a medium order retailer in order to deliver the qualitative uplift in the retail offer and underpin the viability of the centre in the longer term. Notwithstanding the provision of a new foodstore in the local centre, it will be important for provision to be made for smaller units to accommodate non-retail services (e.g. bank) and also for smaller independent retailers.

**Pedestrian Flows**

6.176 Pedestrian flow in Partington was considerably lower than the other main town and district centres surveyed, attributable to the present quantitative and qualitative deficiencies in its retail offer.

6.177 However, notwithstanding the existing state of the local centre, the pedestrian footfall survey found that pedestrian flow was almost double the centres previous year figures. The busiest points within the local centre were on Central Road, near to the library and nursery, and outside James Wright IFA (solicitors), which is the main pedestrian route from the car park to the rear to the Co-Op convenience store and McColls newsagent.

6.178 Given the poor physical layout and environment of the existing centre at present, it is unsurprising that there is no apparent retail circuit with the majority of pedestrian focus being around the main Co-Op convenience store and the public facilities.

6.179 However, notwithstanding the relatively low levels of pedestrian footfall across the centre, it was particularly noticeable at lunchtime that there was a significant increase in passing trade to the Hampson’s bakery on the parade, which may be attributable to the large working population at nearby Carrington.
7. **IN-CENTRE SURVEY RESULTS**

7.1 The in-centre surveys were commissioned to identify shopping habits and to understand views and opinions on the main town centres within the borough. The in-centre survey questionnaires were designed in conjunction with the Borough Council and NEMS and were undertaken between Tuesday 19th and Saturday 30th June on various days to reflect both non-market and market weekdays and weekends within the respective centres, as follows:

- **Altrincham** – 203 surveys completed between Tuesday 19th – Friday 22nd June and Saturday 30th June;
- **Sale** – 75 surveys completed on Tuesday 19th June, Friday 22nd June and Saturday 30th June;
- **Stretford** – 75 surveys completed on Wednesday 20th June, Monday 25th June and Saturday 30th June;
- **Urmston** – 82 surveys completed on Monday 25th June, Thursday 21st June and Saturday 30th June; and
- **Partington** – 76 surveys completed on Tuesday 19th June, Monday 25th June and Saturday 30th June.

7.2 Each respondent was asked a range of questions and was also asked to confirm their postcode at the end of interview in order to inform the extent of the individual centre. The headline qualitative responses on a centre-by-centre basis are summarised below.

**Altrincham**

**Shopping habits and visitation patterns**

7.3 In terms of survey results, respondents identified their main purpose for visiting the town centre as being to shop (61.6%) with only 7.4% of respondents identifying using local (financial) services or work as the main purpose for their visit; a further 6.4% cited leisure / social uses.

7.4 With respect to what else the survey respondents would be doing above and beyond their stated purpose for visit, 19.2% stated shopping, 13.8% visiting pubs / restaurants whilst
11.8% stated using local (financial) services. However, 36.5% stated that they would not be doing anything else beyond their main stated purpose.

7.5 The main type of goods respondents have or were looking to buy in Altrincham were food / groceries (39%), followed by clothing and shoes (37.8%) with a further 18.3% buying toiletries and cosmetics and 17.1% books and stationary. The proportion seeking to buy food / groceries shopping in Altrincham in comparison to other town centres is considerably less than the results for Sale, which totals 73.2%, Stretford 66.1%, Urmston 85.1% and Partington 82.8%. This reflects Altrincham’s greater sub-regional role and stronger comparison goods offer than the other centres.

7.6 With regards as to why respondents came to Altrincham, the majority of respondents (58.6%) cited proximity / convenience with only 10.3% of respondents stating that it was because they worked in the town centre. Only 1 and 2% respectively stated that they chose to visit Altrincham for the selection of independent or multiple shops. Good public transport was cited by 3.9% of respondents; this is particularly low but may be reflective of the temporary Metrolink closures which were in effect at the time of the survey.

7.7 Importantly, in terms of dwell time within the town centre, which is a major indicator of the quality and depth of a town’s retail / leisure offer, the majority of respondents (41.4%) stated that they would be staying for between 1 and 2 hours with a further 19.2% staying for between 2 – 3 hours. Only 9.4% of respondents intended to stay for less than 30 minutes, suggesting that people are making linked shopping / leisure trips within the town centre. This is stark comparison for instance to Partington local centre for example where the relatively poor retail and leisure offer is reflected in 76.3% of respondents there staying for less than 30 minutes.

7.8 In terms of frequency of visit, 23.6% visited Altrincham once a week for food shopping and also non-food shopping; 26.1% of respondents never visited for food shopping, which is possibly more reflective of the localised nature of food shopping patterns, whilst only 7.4% of respondents never visited for non-food (comparison) shopping.

7.9 With respect to leisure, it is evident that daytime leisure patronage is particularly low with 59.1% never visiting Altrincham during the daytime and only 13.3% visiting once a week for daytime leisure activities. This is in comparison to only 10.7% visiting once a fortnight for evening leisure activities and 65.5% never visiting. This is surprising given the recent significant improvements in family-orientated leisure such as the Denmark Street Apollo multiplex development.
7.10 The majority of respondents cited pubs / bars as the main leisure reason for visiting. However, there is significant variance between the respective year groupings (e.g. more ‘younger’ people indicating pubs and bars than ‘older’ respondents).

**Town Centre Perceptions**

7.11 In terms of what respondents liked about Altrincham town centre, the majority stated that the close proximity and convenience of the centre was the main reason (42.9%) followed by its pedestrian friendly environment (22.7%) and the perception of safety within the centre (9.9%). Other reasons included the cleanliness of the streets and the selection / choice of independent shops (8.4% respectively).

7.12 With respect to dislikes, the main responses related to the town centre having an unattractive environment (19.7%), which may reflect in the ongoing Stamford redevelopment, followed by a limited / poor selection of independent shops (19.2%) followed by a limited / poor selection of multiple shops (12.8%). The latter two responses reflect the tension between the need for a significant independent retail offer as well as strong national retailer representation.

**Suggested Qualitative Improvements to Altrincham town centre**

7.13 In terms of what improvements to the quality and range of facilities in the town centre would persuade respondents to visit more often, the main cited improvements related to improving the range of independent / specialist shops (23.6%) and refurbishing / improving existing shopping facilities (18.7%). The ongoing Stamford Centre redevelopment and extension will deliver a significant degree of improvement in both the retail offer and the quality of public realm.

7.14 Above and beyond the main suggested improvements, improving market stalls (14.8%); developing new shopping facilities (13.3%) and improving the choice of multiple shops (13.3%) were popular responses. This is in addition to reducing the cost of car parking (16.7%) and improving street furniture / physical environment (15.8%).

7.15 Finally, in terms of the other competing centres respondents visited most regularly, the larger regional / sub-regional centres such as Manchester City Centre (47.3%), the Trafford Centre (37.9%) and Stockport (14.3%) were most popular, in addition to Sale (27.1%).
Sale

Shopping habits and visitation patterns

7.16 In terms of the main purpose of visit, 88% of respondents (the highest across the surveyed centres) cited shopping, with only 1.3% using local (financial) services or work. However, this is partly explained by the survey results of what respondents would be doing else in the town centre, with 24% of respondents using local (financial) service and 40% not doing anything else. This clearly suggests Sale’s role within the retail hierarchy is one which meets predominantly local needs.

7.17 In terms of the type of goods bought within the town 73.2% of respondents cited food / groceries in comparison to 39% in Altrincham whilst 23.9% would be buying clothes or shoes. Unusually in comparison to the other surveyed centres, 22.5% of Sale respondents stated that they would or have bought household goods and furnishings, which is considerably higher than Altrincham (4.9%). Reflecting the predominantly local day-to-day focus of the retail offer in Sale, the majority of respondents (23.9%) expected to spend less than £10, whereas the majority of respondents in Altrincham (30.5%) stated between £26 and £50.

7.18 In this light, it is unsurprising that 82.7% of Sale respondents stated that they choose to visit Sale because it was near and convenient. Above and beyond the convenience factor, the most responses related to Sale’s pedestrian friendly environment or selection / choice of independent shops (6.7%).

7.19 With respect to dwell times, the majority of responses (42.7%) stated that they would stay in the town centre for up to an hour with a further 38.7% stating that they would stay between 1 and 2 hours. This is encouraging for a town the size of Sale and is reflective of its improving retail offer in both quantitative and qualitative terms. In terms of how often respondents visit for convenience and comparison shopping, 45.3% stated once a week with 32% visiting two or three times a week for convenience shopping and 36% for once a week comparison shopping. These results suggest, particularly with respect to convenience shopping that Sale has more regular patronage than respondents in Altrincham, reflecting its more day-to-day offer.

7.20 In terms of frequency of visits for both daytime and night-time leisure activities, 21.3% of respondents visited 2 or 3 weeks time a week for daytime leisure activities, although 53.3% never visited during the daytime. This compares with only 5.3% visiting 2 or 3 times a week for night-time leisure activities and 57.3% never visiting, potentially reflecting the
popularity of Sale Leisure Centre during the daytime and the predominantly pub-orientated evening economy. Once again, responses relating to leisure visits are mixed depending on age group with the younger respondents favouring pubs.

**Town Centre Perceptions**

7.21 With respect to what people liked about Sale town centre, the majority (66.7%) stated proximity / convenience to the centre as their main like. This is complemented by 21.3% citing the pedestrian friendly environment and 10.7% stating the selection / choice of independent shops.

7.22 The main dislikes about Sale town centre were perceived to be the limited / poor selection of multiple shops (16%), there being better facilities elsewhere (9.3%) and of empty / vacant shops (14.7%), which is of concern. The concern with a lack of car parking which is expressed elsewhere is relatively limited in the Sale survey responses (2.7%), particularly in comparison to Altrincham.

**Suggested Qualitative Improvements to Sale town centre**

7.23 The main suggested improvement to Sale town centre is to expand the range of independent / specialist shops (18.7%) whilst also developing new shopping facilities (17.3%) and refurbishing / redeveloping existing shopping facilities. This is in addition to the recent investment to improve and re-brand The Square shopping centre. A further 16% stated that they would wish for new clothes shops, such as Next (5.3%) to be present within the town centre.

7.24 With respect to leisure, 9.3% stated the provision of a new cinema would persuade them to visit more often. However, given the recent opening of a six screen multiplex in Altrincham, there are limited commercial prospects for new cinema screens to be developed in a centre the size of Sale. This is notwithstanding the fact that the arts centre at Sale Waterside occasionally shows films.

7.25 In terms of alternative centres visited, the majority visited Altrincham (44%), Manchester (22.7%) and the Trafford Centre (26.7%). However, the survey results do indicate that 25.3% of respondents stated that they visited Stretford, presumably attributable to the easy access afforded via the A56 corridor.
Stretford

Shopping habits and visitation patterns

7.26 The main purpose for survey respondents visits was shopping (70.7%) followed by social / leisure reasons (9.3%). In terms of what else respondents would be doing within the town centre, shopping was again the most frequent response (12%) followed by using local (financial services). Apart from Partington, the second highest recorded response for not doing anything else within the centre was Stretford with 50.7%, although this is possibly explained by the town centre comprising mainly the Stretford Mall shopping centre.

7.27 In terms of the types of goods to be bought, the majority of responses stated food / groceries (66.1%) and then clothing / shoes with 32.3%, which is second only to Altrincham in terms of that particular retail shopping sector.

7.28 With respect to the amount of money respondents expected to spend in Stretford town centre, the majority (32.3%) thought they would spend between £26 and £50. The majority of respondents (58.7%) stated that they choose to visit Stretford due to proximity / convenience. The undercover nature of the mall was cited by, 4% of survey responses as to why they chose to visit Stretford. Given that the in-centre surveys were completed in the summer, it is probable that the proportion of respondents visiting for this reason would be expected to rise in the winter.

7.29 In terms of dwell time within the centre, the most responses (36%) stated between one and two hours, whilst a further 34.7% stated between 31 minutes and up to one hour. In terms of regularity of visit, 29.3% visited Stretford between two to three times per week for food shopping, reflecting Stretford’s localised (top-up) role, whilst 21.3% visited once a week for non-food shopping.

7.30 For daytime leisure activities, given the current deficiencies in leisure offer, only 6.7% of respondents visited once a week, whilst 84% never visit. This is broadly comparable to night-time leisure patronage, with only 2.7% visiting once a week and 94.7% never visiting. This may be attributable to the deficiency in offer, particularly with respect to family-orientated leisure (only a Snooker Club and public house within defined town centre) and also its location on the A56 Chester Road and Metrolink network, which affords easy access to larger centres such as Altrincham, Sale and Manchester City Centre.
Town Centre Perceptions

7.31 In terms of what respondents liked about Stretford, the majority, as per the other surveyed centres stated the close proximity and convenience of the centre. However, unlike the other centres, the second most popular response from those surveyed was that they liked Stretford as it is an undercover shopping mall (10.7%). This is in addition to the fact that it had easy parking (8%) and that the town centre was all in one place, was compact and pedestrian friendly (6.7%).

7.32 With respect to ‘dislikes’, the main survey responses related to the centre being ‘run down’ and depressing (6.7%), having a limited / poor selection of independent shops (4%) and an unattractive environment (5.3%).

Suggested Qualitative Improvements to Stretford town centre

7.33 When asked what improvements to the quality and range of facilities in Stretford would persuade shoppers to visit more often, the most popular response was to improve the range of independent / specialist shops (21.3%), improve market stalls (13.3%), improve the range of places to eat (8%) and reduce road congestion (10.7%).

7.34 Notwithstanding the majority of shoppers (32%) citing that they have nothing to suggest by way of improvements, it is clear that shoppers using the Mall, whilst appreciative of the multiple offer and the fact that the centre is compact and undercover, want to improve the local retail offer and potentially develop the town centre into something more than just a shopping mall.

7.35 In terms of alternative centres visited, the majority of residents visit Manchester (44%) or the Trafford Centre (33.3%) with an equal number of respondents visiting Altrincham or Urmston (18.7%).

Urmston

Shopping habits and visitation patterns

7.36 The survey results highlighted that the main purpose of visit to Urmston town centre was to shop (70.7%) followed by using local (financial) services (9.8%). Beyond the main purpose of visit, the majority of respondents (47.6%) stated that they would not be doing anything else in the town centre.
7.37 Reflecting its predominantly daily ‘top-up’ role, it is unsurprising that 85.5% (the highest of all the town centres surveyed) of respondents who came to shop in Urmston visited the centre to buy food and groceries and would expect to spend under £10 (50.7%).

7.38 In terms of why they chose to visit Urmston, the majority cited proximity and convenience (64.6%). Given the ongoing Ask redevelopment of the shopping precinct, it is unsurprising that no respondents cited the choice of independent or multiple shops as the reason why they visited Urmston. This is also reflected in the relatively low dwell time within the town centre with 47.6% (the second highest behind Partington) only staying for up to 30 minutes.

7.39 With respect to frequency of visit, the majority visit once a week (28%) for food shopping and also for non-food shopping (25.6%). Given the predominantly local service role of Urmston within the sub-regional retail hierarchy, it is unsurprising that the majority of respondents did not come to Urmston regularly for daytime leisure activities (73.2% never; 7.3% two or three times a week). Whilst the same proportion of respondents visit Urmston for night-time leisure activities as during the daytime (7.3%), the proportion of respondents never visiting Urmston in the evening for leisure activities increases to 78%.

**Town Centre Perceptions**

7.40 Whilst 35.4% of respondents ‘liked’ Urmston due to its closeness and proximity, 51.2% of respondents liked nothing at all about the town centre. In terms of dislikes, a significant majority of responses cited an unattractive environment (43.9%), a limited / poor selection of independent shops (32.9%) or multiple shops (22%) or the lack of cleanliness of streets.

7.41 It is expected that local resident perceptions of the town will significantly change once the Ask town centre redevelopment, which will regenerate the 1960’s style precinct and provide a modern town centre both in terms of retail offer, is brought forward. Given that many existing retail units within the shopping precinct have closed pending this redevelopment, it is unsurprising that the physical environment is cited as a concern by a majority of respondents.

**Suggested Qualitative Improvements to Urmston town centre**

7.42 Whilst the town centre redevelopment scheme will address many of the suggested qualitative improvements, the main suggestion was to develop new shopping facilities (45.1%), clean the shopping streets (41.5%), improve the range of independent (30.5%) and multiple shops (29.3%). This is in addition improving the range of places to eat
(26.8%), which is significantly higher proportion of responses than any of the other centres surveyed. It is anticipated that this improvement will also be addressed through the provision of new food and drink units within the overall town centre redevelopment.

7.43 With respect to competing centres, the primary destination is Manchester City Centre (56% of respondents). However, it is slightly surprising given its proximity to the Trafford Centre that the second most regularly visited town centre by survey respondents were Altrincham and Sale (26.8%). This compares with 25.6% to the Trafford Centre.

**Partington**

**Shopping habits and visitation patterns**

7.44 The majority of respondents (78.9%) visit Partington for shopping reasons with 61.8% confirming that they would not be doing anything else. Food shopping predominates (82.8%), whilst a significant proportion of respondents sought to buy confectionary / tobacco (43.8%). The majority of respondents (64.1%) would only be spending up to £10. Given the lack of breadth in the local centre offer and its relatively peripheral location, it is unsurprising that 69.7% visited Partington because it was near and convenient and that 76.3% of respondents intended only spending less than 30 minutes in the town centre.

7.45 In terms of frequency of visit, 38.2% of respondents visited the centre everyday for food shopping with 27.6% visiting daily for non-food shopping, notwithstanding the weakness of the offer within the local centre. A significant proportion, 36.8% never visited Partington for non-food shopping whilst given the lack of leisure facilities within or adjacent to the local centre, 75% and 88.2% of responses respectively stated that they never visit for daytime or night-time leisure facilities.

**Local Centre Perceptions**

7.46 The majority of responses (53.9%) state that they like nothing about the centre which reflects the acknowledged deficiencies in the centre. This is in comparison to 28.9% of responses stating they liked Partington due to its proximity, whilst 10.5% cited its pedestrian friendly environment.

7.47 In terms of why respondents disliked Partington, an overwhelming majority of responses (68.4%) cited a limited / poor selection of independent shops whilst 34.2% cited a limited selection of multiple shops. A further 25% of responses stated that the centre had an unattractive physical environment.
**Suggested Qualitative Improvements to Partington**

7.48 Given the present state of the local centre precinct, the majority of respondents (69.7%) believe that the development of new shopping facilities would persuade them to visit Partington more often; on a similar theme 53.9% of responses cite improvements to the cleanliness of the centre as persuading them to visit more often. It is clear therefore that improvements to the retail offer and physical environment in Partington are a priority.

7.49 In addition to developing new retail facilities, the other most popular responses (43.4%) related to improving the range of pubs in Partington and improving public transport links, which are important given the peripheral location on Partington in relation to larger centres. This is reflected in the other centres where respondents regularly visit with Stretford being most popular (43.4%), followed by Sale and Altrincham (35.5%) and Urmston (30.3%). Manchester City Centre is only visited by 25% of respondents whilst the Trafford Centre is visited regularly by 26.3% of respondents.
8. RESEARCH METHODOLOGY

8.1 In this section we outline the methodology, data inputs and assumptions used in the modelling and capacity assessment exercise. Our quantitative assessment uses a conventional step-by-step methodology, drawing upon the results of the household telephone survey in order to understand existing shopping patterns and to model the existing flows of available expenditure to the main retail destinations within the Borough.

8.2 Having established a baseline position, the quantitative capacity modelling exercise has regard to the performance of existing facilities and considers the availability or otherwise of headroom capacity so as to inform an assessment of future needs.

1. Study Area Definition

8.3 The study area largely reflects that contained within the previous borough-wide retail study undertaken by Chesterton’s for the Council in 2001. However, given that Altrincham is identified by emerging RSS as a sub-regional centre and has been subject to significant and ongoing redevelopment, we have updated the Chesterton’s catchment to include two additional catchment zones to cover Lymm and Knutsford. Household surveys of these zones will assist in defining the extent of Altrincham’s sub-regional catchment.

8.4 On the basis of the above, the following survey zones have been identified for the purposes of this quantitative capacity assessment:

- **Zone A – Southern Catchment (Altrincham / Hale / Timperley)** – Postcode Sectors WA14 1 – 5; WA15 0; WA15 6 – 9 and WA13 9;
- **Zone B – Western Catchment (Urmston / Partington)** – Postcode Sector M31 4; M41 0; and M41 5 – 9;
- **Zone C – Eastern Catchment (Sale)** – Postcode Sectors M33 2 – 7; and
- **Zone D – Northern Catchment (Stretford / Old Trafford)** – Postcode Sectors M15 4; M16 0; M16 9, M32 0; M32 8 – 9; M17 1; and M17 8.

8.5 Whilst catchment zones A – D largely reflect the Trafford Borough administrative boundary, the neighbouring catchment zones, as listed below, have also been modelled so as to understand expenditure inflows and enable a more realistic understanding of centre performance:
8.6 A postcode catchment plan reflecting the above catchment zones is provided at Appendix 1. Population and expenditure data utilised in the quantitative capacity modelling exercise for the defined catchment zones was drawn on the basis of the individual postcode sectors.

2) Household Telephone Survey

8.7 The household telephone survey data is an essential input into the expenditure, modelling and capacity elements of the exercise. On the basis of the defined catchment and mindful of the previous survey sample size used in the 2001 Study, NEMS Market Research were commissioned to complete a total of 1,778 household telephone surveys, providing a level of statistical accuracy @ +/- 2.4% of the sample size at 95% confidence level.

8.8 Given the terms of the study brief, the survey sought to establish shopping habits of households in terms of convenience goods (main food and top-up shopping), non-bulky (clothing etc.) and bulky comparison (DIY etc.) goods expenditure.

8.9 With regards to convenience shopping, the results of the two types of food expenditure questions were merged through the application of a weighting (75 – 25% main food / top-up food shopping split), which reflects the estimated proportion of expenditure accounted for by each type of food shopping. This produces a composite pattern of convenience spending, enabling the identification of the market share each main centre presently commands.

8.10 With regards to comparison goods, the household telephone survey included five categories of questions covering shopping for:

Due to a Royal Mail Postcode Sector Change (December 2001) Postcode Sector M5 2, as originally surveyed in the Chesterton’s Study became M5 5 and M50 1 – 3.
• **Comparison (Non-Bulky)** - Clothing and footwear; Personal & Luxury Goods and Recreational Goods; and

• **Comparison Bulky Goods** - Furniture, floor coverings and household textiles; domestic electrical appliances; audio-visual and photographic equipment; DIY and decorating supplies; and personal and luxury items.

8.11 The results of all these questions were also merged using weighting to reflect the amount of per capita expenditure in the identified survey zones for each of the different categories of goods. For example, as considerably more money is spent on clothing and footwear than on DIY goods, clothing and footwear has a higher weighting and thus the weighting exercise produces a composition pattern of comparison goods spending, expressed as a market share for each survey destination.

8.12 In addition to the convenience and comparison retail questions, the household survey was also constructed to understand where people presently go to pursue their main leisure activities (cinema, eating out etc). The survey also sought to determine customer/visitor profile, mode of travel, the attraction and a number of attitudinal questions determining what users think about the retail and leisure offer, environmental quality and their perception of safety. This element of the survey primarily informs our qualitative review of the Borough centres.

8.13 A copy of the questionnaire is provided separately.

### 3) Data Variables

**Estimates of Population in the Survey Area**

8.14 The population estimates and forecasts for each of the survey zones were prepared from the Experian e-Marketer retail planner system, which provides estimates of population based upon trend line projections and the 2001 census for small, localised areas. The population growth of the survey area in the period to 2021 is set out in table 1 of Appendices 4 - 6.

**Available Expenditure in the Survey Area**

8.15 On the basis of the defined catchment zones, we utilised the *Experian e-Marketer System* to provide estimates of per capita expenditure on convenience and comparison goods in 2005 prices.
8.16 However, given that the per capita figures do not reflect deductions made for special forms of trading (e.g. expenditure not available to spend in the shops), we have sought on the basis of the latest advice set out within the *Experian Retail Planner Briefing Note 4.0 (October 2006)*, to make the following percentage deductions from the headline per capita expenditure figures, as follows:

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<td><strong>Comparison Goods</strong></td>
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8.17 In terms of expenditure growth, we have drawn on the growth rates provided by *Experian Retail Planner Briefing Note 4.0 (October 2006)*, which advise a Convenience Goods growth rate of 0.7% per annum, a Bulky Goods growth rate of 4.2% per annum and a Non-Bulky Comparison Goods growth rate of 3.6% per annum.

8.18 Having made the relevant non-deductions for special forms of trading (non-store) and applied the respective expenditure growth rates, the available convenience / comparison goods per capita expenditure within the defined catchment zones is applied to the population forecasts to obtain total available expenditure within each of the survey zones (Table 2, Appendices 4 - 6).

**Floorspace Data**

8.19 We have utilised the Council’s own annually updated town / district / local centre surveys and drawn upon a combination of on-site surveys, Institute of Grocery Distribution (IGD) reports and the measurement of individual units utilising the Promap database in order to establish the floorspace within each respective centre.

8.20 We have also sought to identify the proportion of any non-convenience floorspace within the main convenience stores, which ranges from little in stores such as Co-Op and Iceland to a greater degree within Tesco, Asda or Sainsbury’s stores. All the floorspace data (convenience, non-bulky and bulky comparison goods) has then been adjusted to provide a net floorspace to enable the proper application of respective sales densities, as set out below.

8.21 Extant planning permissions for new retail development within the main centres with the borough (e.g. Ask - Urmston town centre), as provided by the Council in their town centre
development schedule (April 2007), have also been utilised for the purposes of the capacity exercise.

Sales Densities

8.22 In order to review the current performance of each town centre as a retail destination and also the stores within each respective town, we have firstly modelled their existing performance and turnover through utilising telephone interview survey data, and secondly compared their existing turnover with estimates of trading at company average levels.

8.23 The company average trading levels have been calculated from average sales density figures obtained from Mintel Retail Rankings (2007). Where company average trading figures are not available, particularly for smaller stores and particularly local and independent retailers, we have therefore estimated average trading levels.

8.24 In assessing the capacity for future retail floorspace we have assumed that the efficiency with which existing floorspace is being used will improve over time. We have therefore assumed an annual growth rate in existing sales per square metre (m²) of 0.6% for convenience and 2% for comparison floorspace.

4) Catchment and Capacity Review

8.25 Drawing on the results of the household telephone survey and applying the data and associated variables outlined above, we go on to undertake a detailed modelling of town centre performance so as to provide a baseline trading or market share position for each centre and catchment zone. We then go on to review the forward capacity for new floorspace on two levels:

i) by projecting forward existing market share shares and translating growth into floorspace capacity; and

ii) by considering whether the existing market shares will change or whether there is a particular need or deficiency in provision which requires positive intervention.

8.26 The results of this exercise are set out in the next section and summarised in the tables attached within appendices 4 - 6.
9. CONVENIENCE GOODS – MARKET SHARE AND CAPACITY ANALYSIS

9.1 Utilising the results of the household telephone survey alongside the population, expenditure and floorspace data, it is possible to model the convenience goods performance or market share of the individual centres and stores within the four Trafford sub-zones. This provides a baseline position to explore the capacity for further convenience retail floorspace in the Borough.

1. Market Share and Current Performance

Altrincham (Southern Catchment)

9.2 Our assessment shows that the southern zone as a whole retains 75.5% of its main food shopping expenditure and 77.1% of its top-up food shopping expenditure. The primary destinations for main food shopping trips are the two main convenience stores in Altrincham town centre with Tesco (36% of the zone spending) performing marginally ahead of Sainsbury’s (32% of the zone spending). The Marks & Spencer foodhall performs a lesser main food and top-up food shopping destination role.

9.3 With regards to the specific stores, our assessment shows that both Tesco and Sainsbury’s are performing slightly ahead of company average or benchmark turnovers as set out within Mintel Retail Rankings (2007). Table 10 (Appendix 4) shows that the Tesco store is trading approximately 10% ahead of benchmark position (£47.4 million against a benchmark position of £43 million) whilst Sainsbury’s is £1.1 million ahead of a benchmark figure of £36.7 million.

9.4 Whilst trading well therefore the stores do not show any issues in respect of car parking capacity, stock availability, shopping experience and checkout queues. They both comprise modern, up-to-date food retail outlets and properly meet the need arising within the catchment.

9.5 Our assessment shows that the Marks & Spencer foodhall to be slightly under-trading against company averages, although this may be due to the difficulty within the survey exercise of assessing the full extent of the town centre, work based top-up expenditure.
9.6 The main leakage out of the catchment is to the Tesco Extra store at Baguley, which draws c. 12% (£11 million) of main food expenditure out of the catchment.

9.7 The overall performance of the southern zone in terms of market share, spending retention, qualitative provision and breadth of offer is strong. The main food market share of 75% is ahead of 60% figure identified in the 2001 Study (reflecting the new Tesco Extra store that has opened since that time) and suggests that the existing provision is generally meeting the overall needs of the catchment.

9.8 Our assessment does however show that the convenience floorspace in the district centres in the catchment (Somerfield in Hale, Co-Op in Timperley) are playing a limited ‘secondary’ role and potentially underperforming. With regards to Hale district centre, our assessment shows that the Somerfield store only performs no main shopping function. This probably reflects the proximity to the Sainsbury’s and Tesco Extra stores in Altrincham (both within 10 minutes walk) and the limited offer provided. Whilst it is likely that the recent opening of a new Tesco Express and an organic foodstore (As Nature Intended) will improve the convenience retail offer within Hale, this new floorspace is more orientated towards fulfilling a top-up food shopping function.

9.9 With regards to Timperley, the assessment shows a better performance with some main and top-up food expenditure retained by the Co-Op stores and by Iceland. Expenditure is however drawn to the out-of-centre Tesco Extra at Baguley.

9.10 It is evident therefore that the foodstore provision within the two District Centres is neither of a scale or qualitative offer which might be expected within such centres. Whilst the non-retail service and ancillary provision within the centres is generally strong, any improvement in convenience provision should be encouraged. This is addressed in more detail within the area-specific assessments later in this report.

9.11 It is also clear that Hale Barns local centre, which is the main centre serving the eastern half of the southern zone, is not fully meeting the day-to-day needs of its local catchment. Whilst this reflects both the strength of the Altrincham offer and the comparatively limited offer provided by the existing Co-Op store within Hale Barns, it is evident that there is scope for a qualitative improvement in the convenience offer in the eastern part of the southern catchment zone.

9.12 Any new provision within Hale Barns would be likely to retain expenditure that is presently flowing to the main foodstores in Altrincham and potentially retain expenditure leaking outside of the Borough. However, notwithstanding this need, provision would need to be of
a scale that reflects Hale Barns’ position as a local centre within the local retail hierarchy and which meets the spending arising within its natural catchment.

**Sale (Eastern Catchment)**

9.13 Our assessment (Table 7, Appendix 4) shows that the zone as a whole retains 72.2% of the main convenience expenditure and 81.9% of the top-up food expenditure arising from within the eastern catchment zone. This is a relatively strong performance, comparable with Altrincham and reflective of the strong convenience provision within Sale town centre in particular. The primary destinations are Tesco (42.2% of main food, 19.6% of top-up) and Sainsbury’s (22.2% of main, 9.1% of top-up). The assessment also shows a contribution from the Marks & Spencer (M&S) ‘Simply Food’ store and a comparatively strong top-up role performed by local shops (commanding 14.9% of zonal expenditure).

9.14 The overall performance of the zone in terms of its market share, spending retention and qualitative provision is considered to be strong. Whilst the main food shopping market figure of 72% is less than the 87% figure identified in the 2001 Study, the adjustment reflects the new Tesco floorspace provided in Altrincham, which is shown to drawn 5% of main food shopping out of the zone. The market share and spending levels, supported by the positive feedback provided within the in-centre survey exercise, suggests that the overall convenience offer is meeting the needs of the local catchment. This is notwithstanding the unimplemented planning permission for the development of an Aldi store within the town centre, which if brought forward would further diversify the qualitative offer.

9.15 With regards to the performance of the specific convenience stores in the catchment, our assessment shows that Tesco is slightly ahead of company benchmark performance (£2.7 million ahead of a benchmark turnover of £40 million) in comparison to both Sainsbury’s and M&S Simply Food are shown to be trading below company benchmark figures (by 12% and 52% respectively).

9.16 The trading position for Sainsbury’s is slightly surprising given that it is a newer store in comparison to Tesco and enjoys a more prominent frontage on to the A56. The survey findings may simply reflect the comparative positions of the national brands. With respect to the M&S Simply Food outlet, the trading position may be skewed by the failure of the survey exercise to identify drive-by or work related top-up shopping expenditure (particularly given its prominent location on the ‘going home’ side of the A56 Chester Road). On visiting both stores it appears that both are trading reasonably well but our
observations support the assessment findings that neither stores appear to be ‘overtrading’.

9.17 In terms of expenditure leakage from the eastern catchment, as well as the small flows of expenditure towards the main stores in Altrincham, our assessment finds that 12.4% or £9 million is flowing to the large out-of-centre Tesco Extra store at Baguley. This is attributable to the ease of access along the A560 Altrincham Road and the close proximity of the store to the eastern residential areas of the Sale catchment.

9.18 With regards to Sale Moor District Centre, our assessment shows that the existing Spar store and local shops to be fulfilling a reasonable top-up function but provides no main food shopping function. As with Hale and Timperley, the assessment shows that whilst the non-retail service, food and drink and local shop function of the centre is relatively strong, the scale and quantity of the convenience provision is less than may be expected within a district centre. The future potential for change in Sale Moor is considered in further detail in the area-specific assessments.

9.19 At a more localised level, Ashton-on-Mersey local centre, which is located to the north west of Sale town centre and is anchored by a Tesco Express store. It appears to meet local top-up shopping needs from the western side of the eastern catchment zone, claiming 8.5% of top-up shopping expenditure.

**Stretford (Northern Catchment)**

9.20 The northern zone is in effect split into two with the main retail provision being centred on Stretford town centre to the south of the catchment and more local provision in the north of the catchment in the Old Trafford area. Whilst the third biggest catchment zone, supporting c. 48,300 people in 2007 and a projected 52,000 in 2016, the main food shopping provision is limited in comparison to the other zones and centres within the Borough.

9.21 Presently, the main food provision in Stretford is limited to a small-sized (first generation) Tesco Metro store within the Mall and several low cost discount retailers such as Iceland and Quality Save. Provision within the Old Trafford area is more localised, although Trafford Bar local centre is anchored by an Aldi and Iceland store.

9.22 The assessment shows that the Tesco Metro store in Stretford Mall in itself is trading strongly, with an annual turnover figure of £30 million ahead of a company ‘benchmark’ figure of £19.3 million (Table 13, Appendix 4). On site observations at different trading
times does not directly support this apparent level of overtrading as there are no obvious signs of excessive queues, overcrowding or stock gaps for example. However, given the disruption within Urmston town centre at present, it may be that the household telephone survey results and market share assessment are 'skewed' with residents in Urmston using the Stretford store given its prominent location on the junction of Chester Road and Kingsway, which affords easy access to the residential areas in the western catchment zone.

9.23 Notwithstanding the trading position of the Tesco Metro store, it is evident that the existing provision within the northern catchment is not meeting the full needs of local residents, especially within regards to main food convenience shopping. The northern catchment zone is retaining only 32% of the main food spending and c. 50% of top-up food spending arising. Whilst the Tesco Metro store at Stretford dominates with 28% of the overall retention, it is by far the worst performing zone (Table 9, Appendix 4) in terms of retaining main and top-up spending within the Borough.

9.24 The leakage of spending is directed to a number of locations. Within the Borough, the large out-of-centre Asda at Trafford Park attracts c. 15.8% / £8.7 million of the main food shopping arising within the northern catchment zone. In terms of leakage outside of the Borough, the principal destinations are the Asda at Hulme, which commands 17.5% (£9.4 million) of the main food zonal spend and to a lesser extent, the Morrison’s at Chorlton with 9.4% (£5.1 million) and Sainsbury's at Regent Road with 3.5% (£1.9 million).

Urmston (Western Catchment)

9.25 Our assessment in respect of Urmston and the western catchment zone has been undertaken at a time of significant change within the centre with the grant of planning permission for a new c. 4,500 m² (gross) Sainsbury’s store to anchor the wider redevelopment of the town centre. On its current basis however, our assessment shows that in the absence of any main food offer at present, there is a clear distinction between the attraction of the town centre as a convenience destination and the large out-of-centre Asda store at Trafford Park.

9.26 Whilst the Somerfield store within Urmston town centre is shown to be trading significant ahead of its company ‘benchmark’ average, it is a small store with a limited range of goods which is predominantly orientated towards top-up food shopping. When looking at the western catchment zone overall, the household survey results show that the store secures only 5.7% of the main food shopping arising within the zone, compared to 37.9% attracted
to Asda at Trafford Park. The Asda store provides a full range of convenience and comparison offer and clearly dominates the catchment spend.

9.27 The Ask proposals for Urmston will materially improve the town centre offer both in quantitative and qualitative terms and is likely to have a significant impact on current shopping patterns, retaining a significant amount of expenditure arising within the Urmston catchment. However, given the size and draw of the Asda store and its convenient location adjacent to the Trafford Centre, it is likely that the out-of-centre store will continue to exert a significant draw on expenditure.

9.28 The benefit of the Ask proposals and the impact of a new Sainsbury’s store, which is due to commence trading in 2009, on expenditure patterns within the catchment will need to be assessed as part of any update to this study, which we recommend should be commissioned in around 2011 – 2012, so as inform the latter period of its Local Development Framework (LDF) through to 2021.

9.29 In terms of the wider western catchment zone, there are no District Centres within the catchment. The largest local centre at Partington is the subject of a detailed area specific assessment later in this report. However, given the quantitative and qualitative deficiencies in the existing local centre offer (small Co-Op store) there is significant leakage of expenditure to the large Tesco Extra store at Irlam.

2. Capacity for additional floorspace

9.30 The potential scope for forward provision of new retail floorspace arises from two main sources, namely:

1. Taking the current trading position as representing an equilibrium or the baseline (if appropriate), then forward capacity may be generated by growth in key variables such as population and associated expenditure per head. This represents the primary sources as supported within PPS6.

2. An adjustment in baseline market shares prompted by new floorspace our changes in equilibrium.

9.31 On this basis, a review of the forward convenience capacity of the four centres is considered below.
Altrincham (Southern Catchment)

9.32 As set out above, the southern catchment zone is well catered for in terms of main foodstores, which are performing well and which are retaining in excess of 75% of main and top-up food expenditure.

9.33 We consider this to be a strong baseline position and one which is meeting the overall needs of the catchment. The forward capacity is primarily therefore generated out of growth in expenditure rather than a need to improve performance. Table 14 (Appendix 4) shows that once allowance is made for growth in expenditure, alongside provision for efficiency gains in existing floorspace, then there is a minimal capacity new floorspace in the short-term. The quantum of capacity and overall scale of existing provision does not generate the need for any new allocation or specific intervention within Altrincham.

9.34 Whilst the overall zonal performance is strong, it is clear the centres of Hale, Timperley and Hale Barns are underperforming in terms of their convenience provision. The survey results and evident spending patterns identify a need for qualitative improvement in the respective centres so as to better meet locally arising convenience shopping needs. Consideration of the potential for new local convenience provision within Hale and Timperley district centres is considered specifically in the area-specific assessment later in this report.

9.35 With respect to Hale Barns local centre, whilst it is not for this retail study to provide specific sub-zonal capacity figures, any new provision within Hale Barns should:

- Be strong (in store size and product range) so as to reverse the current flows of expenditure and qualitatively enhance the convenience retail offer;
- Be of a size which is appropriate to serve a realistic estimate of its potential local catchment, and the likely spending retention from within that catchment; and
- Be of a size and scale which is appropriate to the local centre status of Hale Barns and which does not materially impact of local convenience provision and status of nearby Hale district centre.

9.36 New provision of an appropriate scale would not undermine the viability of existing provision within Altrincham, given its present strong trading position, and would assist in strengthening the spending retention and market share of the southern catchment zone as a whole.
Sale (Eastern Catchment)

9.37 As with Altrincham, the Sale centred catchment zone is well catered for, both quantitatively and qualitatively, in terms of both main and particularly top-up market share and spending retention. We consider this to be a strong baseline position, with a good range of modern, convenience floorspace adequately meeting the overall needs of the eastern catchment.

9.38 The forward capacity therefore is primarily generated by a growth of expenditure within the catchment zone. Table 16 (Appendix 4) shows that once allowance is made for growth in expenditure per capita and population, alongside a compensatory provision for efficiency gains in existing floorspace, there is a minimal need for new convenience floorspace in the LDF period to 2021. It is considered that the extant planning permission for a new Aldi store within the town centre will predominantly draw on expenditure arising within the eastern catchment.

9.39 As with the Altrincham catchment zone, the minor quantum of capacity will be taken up by normal market or centre dynamics and does not require any specific policy or site-specific intervention. However, whilst the overall zonal performance is strong, our area-specific assessments have highlighted the limited contribution to the main and top-up shopping provision made by the Sale Moor district centre. This matter is considered further within the area specific assessments undertaken later in this report.

Stretford (Northern Catchment)

9.40 In contrast to the Altrincham and Sale catchment zones, our assessment shows that the convenience offer within the northern zone and within Stretford town centre in particular is not meeting the overall needs of the catchment. Whilst the Tesco Metro store in Stretford Mall is apparently trading well, the overall market share of the catchment zone is weak and the survey results show significant expenditure leakage to stores either out of the centre (e.g. Asda at Trafford Park) or outside of the Borough (e.g. Asda at Hulme).

9.41 Our assessment shows that if the current position is taken as a baseline and that appropriate adjustments are made for expenditure and floorspace efficiency growth, then minimal capacity exists for new convenience floorspace (Table 17, Appendix 4).

9.42 However the relative under-performance of the zonal floorspace and the significant leakage of expenditure outside of the catchment suggest that it would not be desirable or sustainable to maintain the current position / performance. This underperformance in the northern catchment was acknowledged in the adopted UDP (policy H10) and the
subsequent grant of planning permission for a new (c. 4,500 m² gross) Tesco foodstore at Stretford Leisure Centre.

9.43 A review of this potential forward provision is set out in section 11 of this report.

Urmston (Western Catchment)

9.44 The western catchment, focussed on Urmston town centre, is also failing to meet the local convenience needs of its catchment as it should, certainly when compared to the Altrincham and Sale catchment zones. The role of the town centre in both main food and top-up food shopping is weak; whilst the large out-of-centre Asda store at Trafford Park is the dominant store within the catchment, there is significant leakage to the Tesco Extra store at Irlam (Salford).

9.45 If this position was taken as a baseline then our assessment at Table 15 sets out the modest growth-based forward capacity position. In reality however, the catchment zone is in a state of flux with the confirmed development of a medium sized Sainsbury’s foodstore as part of the wider Urmston town centre redevelopment by Ask.

9.46 Consequently, it is not possible to provide effective comment on potential forward capacity. However, assuming the proposed Sainsbury’s store trades in line with company ‘benchmark’ average and delivers the qualitative uplift that it is likely to achieve, then in combination with the out-of-centre Asda offer at Trafford Park and enhanced local centre provision in Partington (as detailed in the area specific assessment below) then minimal forward capacity or need will arise.
10. COMPARISON GOODS – MARKET SHARE AND CAPACITY ANALYSIS

10.1 As with the convenience exercise set out in the previous section, it is possible to utilise the results of the quantitative exercise to model the comparison (bulky and non-bulky) goods performance and market share of the individual centres and stores within the four Trafford zones we have identified. This then provides a baseline position to explore the capacity for further convenience retail floorspace in the Borough.

Altrincham (Southern Catchment)

Non-Bulky Comparison Goods

Existing Performance

10.2 Altrincham is the primary town centre within Trafford and is encouraged by the emerging replacement Regional Spatial Strategy (RSS) to adopt a significant sub-regional role in comparison shopping. Therefore, as would be expected, in terms of non-bulky comparison shopping, it is the largest centre within the borough and dominates the catchment to which it relates.

10.3 Our assessment (Table 5, Appendix 5) shows that the town centre is performing well across the main non-bulky comparison categories of clothing and footwear (where it retains 51.3% of the zonal spending) and personal / luxury goods (where it retains 62.1% of zonal spending). The town centre also commands a 28.1% market share in relation to recreational goods, although the primary destination for this type of goods within the southern zone is Altrincham Retail Park, which claims a 37.2% (£8.4 million) market share in this sector.

10.4 The assessment also shows that the centre is performing a wider sub-regional role, attracting significant spending from the Baguley, Lymm and Knutsford catchments. This is in addition to Altrincham drawing from the Sale catchment (e.g. 17% for clothing and footwear), which is reflective of its higher order function / provision.

10.5 Our assessment shows that the non-bulky comparison turnover of the southern zone to be in the order of £77.5 million. This turnover is generated out of a net non-bulky floorspace
figure in the order of c. 36,500 m², providing a zonal sales density of approximately £3,793 per m² net. Based on our experience elsewhere and considering the competition in the sub-region, we consider that the southern zone is performing well in the non-bulky sector. Within this overall zonal performance, the turnover of Altrincham town centre is in the order of £62.8 million (Table 9c, Appendix 5), which translates to an overall 50.8% town centre market share for non-bulky comparison goods from the southern zone.

10.6 However, given that non-bulky comparison offer within Altrincham town centre is in transition at the moment with the ongoing redevelopment of the Stamford Quarter, it is not unreasonable to expect that the current trading performance of the town centre will significantly improve.

Baseline Capacity Assessment

10.7 Notwithstanding the relative strength of nearby competing higher order provision, on the basis of existing market shares, our assessment (Table 13a, Appendix 5) shows that once allowance is made for growth in expenditure per head and efficiency gains by existing floorspace, capacity is generated for c. 2,350 m² (gross) of non-bulky floorspace in 2010, rising to 12,000 m² (gross) in 2021.

10.8 However, these baseline capacity figures do not take account the impact on available expenditure of existing retail commitments (e.g. Stamford Quarter development) within for the southern zone. Consequently, with commitments taken into consideration, table 13b (Appendix 5) provides that there would be no capacity for new floorspace in the short term (2010), although significant capacity would exist to support c. 9,600 m² (gross) of new floorspace by 2021.

10.9 Given the position of Altrincham within the retail hierarchy and the policy focus provided within RSS we consider that there should be scope to improve Altrincham’s existing market share from the southern catchment. We therefore consider the potential for uplift in the town’s market share in the next section.

Bulky Goods

Existing Performance

10.10 With respect to bulky goods provision, our survey assessment also shows that Altrincham is meeting some element of the bulky goods expenditure that arises within the zone, performing creditably in respect of the furniture (with 24.9% of zonal expenditure),
domestic appliances (13.6%) and audio-visual (21%) market sectors (Tables 5a – 5e, Appendix 6).

10.11 However, the catchment is dominated across all bulky goods sectors by the provision at Altrincham (Broadheath) Retail Park, which includes the B&Q and Homebase stores. The Wyevale Garden Centre at Timperley draws a reasonable level of trade from the catchment.

10.12 Table 5 (Appendix 6) sets out the individual market shares, demonstrating not only the dominance of these stores within the catchment but also in respect of adjacent centres / zones. As an example, in the domestic appliance market sector, Altrincham Retail Park not only commands 60.6% of spending arising within the southern catchment zone, but it also commands 44.3% of the Sale zonal spending, 36.3% of the Baguley zonal spending, 15% of the Lymm spending and 7% of Knutsford expenditure.

**Baseline Capacity Assessment**

10.13 Given the existing bulky goods provision within Altrincham town centre, allied to the strong out-of-centre retail park provision (Altrincham Retail Park), it is unsurprising that the southern zone retains c. 65.8% (£67.9 million) market share from within the catchment. Given the larger projected increase in expenditure growth for bulky goods (Experian advises 4.2% per annum for bulky goods in comparison to only 3.6% for non-bulky retail), there is significant capacity identified on the basis of expenditure growth alone.

10.14 Taking into account floorspace efficiency growth and existing commitments, table 13a (Appendix 6) shows that capacity is projected to grow from c. 5,000 m$^2$ (gross) in 2010 to c. 26,100 m$^2$ (gross) in 2021. However, should the existing retail commitments within the southern catchment be realised (table 13b), then capacity is reduced to c. 900 m$^2$ gross in the short term (2010), although capacity would sharply rise to c. 22,000 m$^2$ (gross) in 2021 as a result of expenditure growth.

**Sale (Eastern Catchment)**

**Non-Bulky Comparison Goods**

**Existing Performance**

10.15 The town centre performs a more secondary comparison role when compared to Altrincham and therefore any assessment of the performance of the centre should have
regard to its scale, its position within the sub-region retail hierarchy and the fact that local shoppers are prepared to travel further afield to meet comparison shopping needs.

10.16 Therefore, it would be unreasonable to expect centres such as Sale to secure a significant market share or to compete head to head with neighbouring larger centres. However, there is still an expectation that more secondary centres do provide for a level of comparison need and that this should be strengthened where possible.

10.17 The comparison offer within the eastern catchment is focussed within Sale town centre as there is no out-of-centre or retail park provision within the eastern zone.

10.18 The more secondary role of Sale is reflected in our assessment (Table 7, Appendix 5) which shows that Sale is retaining 15.5% of the zonal clothing and footwear expenditure, 36.5% of the personal / luxury goods spending and 15% of the recreational goods expenditure available. There is some minor expenditure attracted from the Baguley zone but otherwise the town centre serves an essentially local catchment.

10.19 The assessment show the non-bulky comparison turnover of the eastern catchment to be in the order for £28.9 million from the eastern catchment zone, which when assessed against the total floorspace within the catchment of c. 8,800 m² (net) generates a sales density figure of c. £3,350 per m². This figure is relatively positive given the secondary role and Sale relative to larger higher order centres within the retail hierarchy.

**Baseline Capacity Assessment**

10.20 On the basis of existing market shares, expenditure growth and allowances for gains in floorspace efficiency, our assessment shows (Table 14, Appendix 5), that capacity is identified for c. 700 m² (gross) of floorspace in 2010, rising to c. 3,500 m² (gross) of capacity in 2021.

10.21 However, given that local residents within the eastern catchment predominantly look towards Altrincham for their wider non-bulky comparison shopping needs, when the expenditure drawn to the Stamford Quarter redevelopment and other retail commitments within the eastern catchment are considered against the baseline capacity figure, there is minimal requirement / capacity for new non-bulky retail floorspace in the short term, although through expenditure growth within the eastern catchment, there is a positive requirement for c. 2,200 m² (gross) of capacity in 2021.
Bulky Goods

Existing Performance

10.22 As with non-bulky goods, the town centre fulfils a mainly secondary function, with its strongest market share being within the furniture and floor market sector, where it commands 23.8% of the zonal spending (Table 7, Appendix 6). The household survey results confirm that the majority of the spending across all bulky goods sectors (e.g. DIY, Domestic Appliances) is directed to Altrincham Retail Park in particular, which draws c. £32.5 million of expenditure from the eastern catchment. The household telephone survey results also highlight that B&Q at Altrincham Retail Park draws a 46.9% market share (c. £5.1m) from the eastern catchment.

10.23 Given the extent of the competition from higher order centres, Sale presently has a turnover of c. £18.7 million and on the basis of c. 5,500 m\(^2\) (net) floorspace, this generates a relatively high turnover of c. £3,600 per m\(^2\) in comparison to Stretford (c. £3,050 per m\(^2\)) and Urmston (c. £2,900 per m\(^2\)), which is positive given that there is no mainstream bulky goods provision within the eastern catchment.

Baseline Capacity Assessment

10.24 On the basis of current market share (Table 15, Appendix 5), a small amount of capacity (c. 600 m\(^2\) gross) will be generated by 2010, although on the basis of longer term expenditure growth, capacity is identified for c. 3,300 m\(^2\) (gross) of bulky goods floorspace by 2021. However, once commitments are taken into account, such as Barton Square, which we anticipate will have a borough (and sub-regional) catchment draw, capacity for new bulky goods floorspace within the eastern zone is c. 1,400 m\(^2\) (gross) by 2021.

Stretford (Northern Catchment)

Non-Bulkly Comparison

Existing Performance

10.25 Stretford Mall provides the main non-bulky floorspace within the northern catchment. Our assessment however (Table 8, Appendix 5), shows that the centre fulfils a very limited role, commanding 11% of clothing and footwear spending, 16.3% of personal / luxury goods spending and 10.3% of recreational goods spending arising from within the northern zone. These individual market shares equate to an overall town centre market share of 12.6%,
which is significantly below the market share assumed by Sale town centre (22.7%) from its eastern zone.

10.26 Whilst Stretford attracts a minor degree of spending (c. £5 million) out of the Urmston zone at present, the household survey results indicate a significant degree of expenditure leakage out of the northern zone to higher order centres, as follows:

- **Manchester City Centre** – Clothing (42.6% / £13.4 million); Personal Goods (36.9% / £8.6 million); and Recreational Goods (40% / £6.1 million).
- **The Trafford Centre** – Clothing (22.8% / £7.2 million); Personal Goods (18.8% / £4.4 million) and Recreational Goods (7.2% / £1.1 million).

10.27 The assessment shows that the non-bulky turnover of the catchment to be in the order of c. £21.4 million on the basis of c. 10,900 m² (net) of floorspace. This produces an average sales density within the northern zone of c. £2,050 per m², which is significantly below the Sale zonal performance of c. £3,400 per m². This relatively poor trading performance may be attributable to the proximity and ease of access from the northern zone to higher order centres (e.g. Manchester City Centre) and the fact that Stretford Mall is not modern in terms of design, accessibility or shopping experience.

**Baseline Capacity Assessment**

10.28 On the basis of current expenditure patterns, we consider that there is potential for improvement, both in relation to the performance of the existing floorspace and in the ability of the zone to accommodate new floorspace and increase expenditure retention. On a simple expenditure growth basis with relevant deductions for floorspace efficiency gains, quantitative capacity is identified for c. 500 m² (gross) of retail floorspace in 2010, rising to c. 2,600 m² (gross) in 2021.

10.29 However, this capacity is without considering the trading impact of existing retail commitments such as the Stretford Mall extension or the non-food element of the Tesco Foodstore at Stretford Leisure Centre. We consider therefore, that there is considerable scope to increase Stretford’s market share in relation to non-bulky comparison goods and the potential for market share increase within the northern zone is explored in greater detail in the next section.
Bulky Goods

Existing Performance

10.30 With regards to bulky goods provision, the primary offer within the northern zone is White City Retail Park, which is located in an out of centre location c. 1.5 miles to the north of Stretford town centre on Chester Road (A56) in Old Trafford. This allied to the standalone B&Q unit at Stretford Leisure Centre, commands a significant market share across all the bulky goods sectors, notably in relation to domestic appliances (50.1% of northern zone spending) and audio-visual (40% of zonal spending). Given the strength of this out-of-centre competition, it is unsurprising that our assessment finds that Stretford town centre commands a relatively low bulky goods market share of 9.4% (c. £6 million) from the northern zone, which is the lowest in comparison to other town centres within the Borough (Sale 17.7% and Urmston 11.3%).

10.31 The overall turnover performance of the northern zone is identified as c. £3,053 per m$^2$, which is above the Urmston zone (£2,131) and may in part be attributable to the wider draw of White City Retail Park.

Baseline Capacity Assessment

10.32 With existing provision being predominantly focussed on White City Retail Park, it is unsurprising that the northern catchment secures a reasonably positive market share from its catchment. On the basis of expenditure growth and having made appropriate provision for floorspace efficiency gains, Table 16 (Appendix 6) shows that capacity will exist in the catchment for c. 2,500 m$^2$ (gross) of bulky goods retail floorspace in 2010, rising to c. 12,900 m$^2$ (gross) in 2021. However, once the impact of existing commitments is made on available expenditure, there is only capacity to support c. 3,500 m$^2$ (gross) of floorspace in 2013, rising to c. 11,300 m$^2$ (gross) in 2021.

Urmston (Eastern Catchment)

Non-Bulky Comparison Goods

Existing Performance

10.33 Comparison shopping patterns within the western catchment are particularly affected by proximity to The Trafford Centre and the wider retail provision adjacent (Asda, Costco and Trafford Retail Park) and the relative weakness of the Urmston town centre offer at
present. Whilst the Ask proposals will significantly improve the town centre offer, particularly in qualitative terms, our assessment shows that the centre currently fulfils a minor comparison role within the western catchment.

10.34 With regard to the non-bulky comparison expenditure (Table 6, Appendix 5), the town centre commands a market share of only 6.8% (c. £5 million) of the expenditure arising across the non-bulky market sectors within the western zone. This relatively low market share is primarily attributable to the town's proximity to The Trafford Centre, which commands 55.9% of the zonal spending on clothing / footwear, 51.1% of the personal / luxury goods expenditure, and 30.3% of the recreational goods expenditure. Trafford Retail Park also makes a significant draw on expenditure, although this is predominantly in relation to bulky-goods.

Baseline Capacity Assessment

10.35 As with convenience capacity assessment, given the ongoing Ask town centre development, it is difficult to assess the forward capacity for new comparison floorspace in Urmston town centre at this transitional time.

10.36 On the basis of expenditure growth within the western catchment there is capacity for c. 4,000 m$^2$ (gross) of floorspace in 2010, rising to c. 20,200 m$^2$ (gross) in 2021. Existing commitments only marginally impact on the expenditure available to support new floorspace, with capacity for c. 2,900 m$^2$ (gross) of new retail floorspace required by 2010 and c. 19,100 m$^2$ (gross) by 2021.

10.37 Whilst this level of quantitative capacity would ordinarily indicate a requirement for the Council to proactively plan for future development, given that the forthcoming Ask town centre redevelopment is likely to meet the quantitative and qualitative needs of the catchment, we do not consider that there is significant scope to provide new floorspace until trading patterns have settled down.

10.38 With respect to satisfying the forward capacity identified, we would recommend that the Council seeks to restrict any new non-bulky development within the western catchment zone in the short-term. This will provide the opportunity for the Urmston town centre scheme to commercially ‘establish’ itself within the catchment.
Bulky Goods

Existing Performance

10.39 With regards to bulky goods provision, the town centre again fulfils a limited role with its strongest market share being in the furniture and floor covering sector, where it secures 20% of zonal spending arising from within the western catchment zone. Overall, the town centre secures an 11.3% market share (c. £7 million) in bulky goods, which is relatively weak in comparison to Sale, which secures 17.7% from its primary (eastern) catchment.

10.40 The majority of bulky goods expenditure within the western catchment zone is drawn to Trafford Retail Park (Table 6, Appendix 6) which commands a 19.8% market share on furniture / floors, 24.7% on domestic appliances and 26.9% on audio-visual. With respect to DIY, the large standalone B&Q store near to The Trafford Centre is the primary destination within the western catchment, drawing 57.6% with respect to DIY and 29.2% for Garden / Pets shopping. Costco is also popular for bulky comparison (white goods) shopping.

10.41 Notwithstanding the relative strength in the bulky goods offer within the western catchment, our assessment shows that the western zone has the lowest turnover (c. £2,100 per m$^2$) in comparison to the other zones within the Borough (Sale c. £3,500; Stretford c. £3,000). However, we expect that the turnover of the zone will significantly improve with the redevelopment of Urmston town centre and the opening of the Barton Square development near to The Trafford Centre.

Baseline Capacity Assessment

10.42 Whilst existing provision within Urmston town centre is relatively weak, Trafford Retail Park and the large stand-alone B&Q store near to The Trafford Centre secure a significant proportion of expenditure arising from within the catchment.

10.43 Notwithstanding the town centre redevelopment in Urmston, it is difficult to assess future capacity for bulky goods provision within the western catchment given the ongoing development of the bulky goods (homeware) based Barton Square development (c. 18,500 m$^2$ gross) near to The Trafford Centre. Whilst the Barton Square development will assume a wider sub-regional role given the type of retailer attracted to the scheme thus far (Habitat and M&S Homeware) and the potential for linked trips with The Trafford Centre, it is anticipated that it will impact on existing shopping patterns within the catchment and wider Borough.
10.44 However, on the basis of expenditure growth, capacity is identified (Table 14, Appendix 6) for c. 2,900 m² (gross) of new retail floorspace in 2010, rising to c. 6,100 m² (gross) in 2013 and 15,500 m² (gross) in 2021. This capacity provides significant scope for growth, although when existing commitments (e.g. Barton Square) are considered, our assessment shows that there is no need for additional bulky goods floorspace within the western zone until 2013 when capacity exists for c. 2,100 m² (gross). In the longer term, our assessment shows that there may be a requirement for c. 11,600 m² (gross) of bulky goods floorspace by 2021.

**The Trafford Centre**

10.45 The Trafford Centre is one the largest out-of-centre shopping centre complexes in the UK, serving a significant catchment extending beyond just the North West region. However, given its status as an out-of-centre development in both the adopted UDP and the emerging replacement RSS, which also identifies no formal scope to identify the centre as a regional centre at present, we have not sought to assess the future capacity for additional retail provision as part of this borough-wide retail study. Clearly, in order to accurately quantify the true extent of the centre’s draw and market share, a full regionally-based assessment would be required.

10.46 However, on the basis of the catchment zones identified as part of this study, we are able to quantify its turnover from the borough and the wider catchment.

**Non-Bulky Comparison Goods**

10.47 Given the primary focus of the retail offer at The Trafford Centre is predominantly orientated towards high street fashion goods, it is unsurprising that the centre commands a significant market share in relation to clothing, luxury goods and recreational goods sectors. A full assessment of its existing market share is provided in Tables 6a – 6c of Appendix 5, however in summary, the household telephone surveys confirm:

- **Clothing and Footwear** – The Trafford Centre draws c. £46.1 million from the Borough out of an overall total of c. £68 million from the wider catchment. The centre commands a 14.9% (£8.6 million) market share from the Altrincham catchment; 55.9% (£18.9 million) from the Urmston catchment; 28.1% (£12.4 million) from the Sale catchment; and 22.8% (£7.2 million) from the Stretford Catchment.

- **Personal and Luxury Goods** – The Trafford Centre draws a total of £41.6 million from the wider catchment, of which £29 million is drawn from the Borough. In terms of
individual draws from the Borough sub-zones, 9% (£3.9 million) is drawn from the Altrincham catchment; 51.1% (£12.5 million) from the Urmston catchment; 24.5% (£8.2 million) from the Sale catchment; and 18.8% (£4.4 million) from the Stretford catchment.

- **Recreational Goods** – The Trafford Centre draws a total of £8 million from the Borough out of an overall draw of £14.5m from the wider defined catchment. In terms of the draw from the Borough sub-zones, 2.6% (£0.6 million) is drawn from the Altrincham catchment; 30.3% (£4.8 million) from the Urmston catchment; 8.4% (£1.5 million) from the Sale catchment; and 7.3% (£1.1 million) from the Stretford catchment.

10.48 In terms of the overall expenditure draw, our zonal-based assessment finds that The Trafford Centre presently draws c. £124.1 million from the wider defined catchment. This turnover figure is solely based on household survey results and does not include inflows of expenditure from outside the catchment, which would be difficult to quantify given the regional draw of the centre.

**Bulky Comparison Goods**

10.49 With respect to bulky comparison goods, whilst the centre is not a destination for DIY or Garden / Pets shopping, the centre performs relatively strongly in relation to audio-visual goods and to a lesser extent in relation to domestic appliances and household goods. As with non-bulky comparison goods, a full assessment is provided at Tables 6a – 6e of Appendix 6. However, in summary:

- **Furniture / Flooring** – The Trafford Centre draws £5.8 million from the wider defined catchment, of which, £3.85 million is drawn from the Borough sub-zones. Minimal flows of expenditure were drawn from the Altrincham, Sale and Stretford catchment zones, although 8.8% (£1.6 million) was drawn from the Urmston catchment.

- **Domestic Appliances** – The household survey indicates that The Trafford Centre draws c. £4 million from the wider defined catchment, with £2.55 million being drawn from the Borough. The main draw of the centre from within the Borough related to Urmston catchment (6.9%, £0.75 million) and the Stretford catchment (7.3%, £0.8 million).

- **Audio-Visual (Home Entertainment)** – Given the presence of electrical retailers such as Curry’s and Sony as well as a large home entertainment section with department stores such as Selfridge’s, the centre presently draws c. £9.2 million from the Borough sub-zones out of a survey-derived total of c. £15.3 million from the wider catchment.
Whilst flows from the Altrincham catchment are negligible given the existing provision, the centre draws strongly from the Urmston catchment (23.4%, c. £4.6 million) and to a lesser extent from the Sale catchment (9.2%, c. £2.3 million) and also the Stretford catchment (8.2%, c. £1.7 million).

10.50 Overall, The Trafford Centre draws c. £25.3 million of bulky goods expenditure from the wider catchment, with £15.6 million being drawn from the borough sub zones. Our assessment finds that the overall comparison goods turnover of The Trafford Centre derived from the defined catchment is c. £150 million. Clearly, this turnover is only a ‘snapshot’ of overall performance, given that a detailed survey of a regional scale would need to be undertaken in order to accurately quantify the true extent of its regional draw and thus a more accurate turnover performance.
11. FORWARD QUANTITATIVE CAPACITY – MARKET SHARE ADJUSTMENTS

11.1 The quantitative capacity assessments undertaken for the four zonal catchments indicate varying degrees of performance across the convenience and comparison goods sectors. In some sectors, (convenience provision in Altrincham and Sale), the town centres are performing strongly. In other areas, (comparison shopping in Stretford), the performance is weak. Whilst it is acknowledged that the secondary centres such as Stretford, Sale and Urmston will continue to perform a primarily convenience and service role, in considering whether there is scope for improvement, we also consider that it is not unreasonable for them to seek to maintain a reasonable comparison offer and where possible deliver qualitative improvements.

11.2 We have therefore taken the baseline position, as established in the previous sections, and gone on to consider what may be achievable in terms of potential increases in market share and thus quantitative capacity. This judgement is informed by our understanding of the current performance of the town centres and their realistic catchment, the stated opinions and preferences of the catchment population, the role and function of the centres within the retail hierarchy and the strength and development proposals of competing centres.

11.3 This exercise is undertaken on a quantitative basis. The potential uplift in expenditure only represents actual capacity if the retail proposals and the floorspace/operators that may come forward can add qualitatively to the retail offer of the respective town centres, strengthening it attractiveness and being genuinely capable of achieving the envisaged improvements in market share.

11.4 Any assessment of course should be viewed against the framework provided by PPS6 which states that appropriateness of scale rather than specific quantitative need is the key determinant. Therefore, should proposals emerge for the development of new retail facilities within the primary shopping area of the respective town centres within the Borough then the Council should consider any application on its merits, having particular regard to the qualitative uplift that proposals could deliver.
Altrincham (Southern) Catchment

Convenience

11.5 As our baseline assessment confirms, the performance of the catchment zone in terms of market share and expenditure retention is very strong, with Altrincham town centre retaining 75.5% of main food shopping and 77.1% of top-up food expenditure. Therefore, in light of this strong performance and the strength of existing town centre convenience offer, we consider that there is limited forward potential to secure a significant uplift in market share across the zone.

11.6 We do however consider that there is a need for new foodstore provision further within the existing district centres of Hale and Timperley, and the local centres at Hale Barns and Broadheath. This requirement for new foodstore provision within the district and local centres is supported by the results of the household telephone survey, which on a finer grain analysis, highlight that the existing foodstore provision is not meeting local needs. In the case of Broadheath, the requirement for new convenience provision arises from the fact that the existing local centre allocation has not been brought forward and that planning permission remains extant for c. 1,500 m$^2$ (net) of retail floorspace.

11.7 Whilst we specifically assess the potential for new convenience provision within the respective district and local centres on a qualitative basis through the area-specific assessments, we consider that quantitative need for new foodstore provision will be primarily generated through a redistribution of expenditure within the catchment alongside some minor claw-back of expenditure presently leaking outside of the catchment.

Non-Bulky Comparison

11.8 In assessing the potential for market share uplift across the borough, we consider that only Altrincham has the potential to significantly increase its existing market share given its sub-regional status and its existing critical mass of higher order retail provision.

11.9 At present, Altrincham town centre presently commands 50.8% market share (c. £62.8 million) for non-bulky comparison goods from the southern catchment. Whilst this present market share performance is relatively positive given strong competition from Manchester City Centre and The Trafford Centre, we consider that there is potential for further improvement in Altrincham town centre performance given the strength of the catchment and the existing and emerging retail proposals for the town centre.
On this basis, we have identified a growth scenario which envisages an increase in market share from Altrincham’s primary (southern) catchment to c. 60%, with minor increases in market share from Altrincham’s secondary catchment (Sale, Baguley, Lymm and Knutsford) to reflect the draw of the Stamford Quarter and Altair schemes within Altrincham town centre. A likely minor increase in expenditure inflows from beyond the defined catchment is also acknowledged.

The growth scenario has had regard to the Stamford Quarter improvements which will deliver a significant uplift in the quality of the Altrincham retail offer and the emerging Altair proposals. The growth assumptions are underpinned by the following:

- The household telephone survey results confirm that residents within the neighbouring zones already look towards Altrincham for non-bulky comparison shopping needs with the town centre presently securing a c. 15.5% market share from Sale, 19.3% from Baguley, 18.2% from Lymm and 10.4% from Knutsford;
- The secondary nature of the non-bulky retail offer within the respective catchments, allied to higher order retailers looking to locate within higher order centres such as Altrincham;
- The proximity and ease of access to Altrincham town centre from the respective catchments; and
- The diversification of the Altrincham offer, both in terms of new floorspace and the addition of new non retail and leisure uses (e.g. cinema).

On this basis Table 18 of Appendix 5 provides that capacity is generated, after existing commitments, for c. 10,500 m² (gross) in 2010, rising to c. 13,500 m² (gross) in 2013 and c. 16,600 m² (gross) in 2016.

The achievement of this growth scenario will allow for Altrincham to fulfil its sub-regional role, as envisaged within the emerging replacement RSS, and would enable it to compete more effectively with the higher order destinations. We therefore would advocate that the Council actively seek to create the conditions to achieve the growth scenario and plan through the LDF to accommodate the capacity identified. On the basis of our initial understanding of the scheme, we consider that the Altair scheme could deliver the significant qualitative uplift required to enable Altrincham to further consolidate its sub-regional status within the retail hierarchy.
Sale (Eastern) Catchment

Convenience

11.14 Sale largely reflects Altrincham in terms of convenience performance given that it secures a similar market share in relation to main-food and top-up food from its immediate catchment (72.2% and 81.9% respectively) and has a comparable convenience offer in terms of Tesco, Sainsbury’s and Marks & Spencer (Simply Food).

11.15 Whilst planning permission for a new in-centre Aldi foodstore remains extant, we do not consider that there is a need to proactively plan for new convenience retail development in Sale town centre. However, we do consider that there is scope to improve, both in quantitative and qualitative terms, foodstore provision within Sale Moor district centre, which presently only accommodates a small-scale Spar store. This is considered in the area-specific assessment later in this report.

Non-Bulky Comparison

11.16 The household survey results highlight that the town centre secures a 22.7% comparison market share from its primary catchment, which we consider is reasonable given the existing offer and the proximity and ease of access to larger centres.

11.17 We do not consider that there is any realistic prospect of significantly improving this figure. The town centre will remain a secondary destination for non-bulky comparison retail and that the future focus for Sale should be on consolidating and securing a qualitative uplift in the town centre offer rather than any substantive quantitative expansion.

11.18 We recommend that the Council focuses on securing qualitative improvements for the town centre, such as encouraging the amalgamation of existing units along the School Road frontage so as to create floorplates for larger national multiples. We have identified several short term development opportunities such as the vacant Aldi site (awaiting redevelopment) and the vacant former Kwik Save store on the primary School Road which could deliver qualitative improvements in the short-term. These town centre development opportunities are assessed in detail later in this report.
Stretford (Northern) Catchment

Convenience

11.19 At present, existing foodstore provision within Stretford and Old Trafford retains 32% of main food and 50% of top-up food expenditure arising from within the northern catchment. Whilst 15.8% (£8.7 million) of main food expenditure arising is retained within the borough, being directed to the out-of-centre Asda at Trafford Park, our assessment finds that there is significant leakage of expenditure outside of the Borough to the Asda store at Hulme (c. £9.4 million), Morrison’s at Chorlton (c. £5.1 million) and Sainsbury’s Salford (£1.9 million).

11.20 This market share performance is significantly worse than the Altrincham and Sale catchment zones, which retain around 75% of main food and 80% of top-up food expenditure arising from within their own respective catchment zones. Therefore, for the purposes of this Study, we have considered the potential for the zone to perform better and potentially mirror the performance of the Altrincham and Sale catchment zones.

11.21 On this basis, the capacity figures identified broadly reflect the position agreed during the consideration of the Tesco proposal. Allied to continued expenditure flows from within the wider study catchment (e.g. Salford / Eccles or Chorlton zones) and also from drive-by trade given the northern zone’s strategic location along the Chester Road (A56) corridor, an additional c. £25.3 million of expenditure capacity would be generated, which would support c. 3,500 m² (gross) of convenience floorspace in 2007. This reflects the broad scope of provision as approved within the extant Tesco permission at Stretford Leisure Centre.

Non-Bulky Comparison

11.22 Given the relatively poor performance of the northern zone as a whole and Stretford town centre in particular, we have sought to model an increase in the town’s market share from 12.6% to 20%, a rate which reflects other equivalent town centres. This will allow an understanding of what potential capacity may exist for non-bulky comparison floorspace within the town centre.

11.23 Taking existing comparison commitments within the northern zone into account, the increase in market share (Table 20 Appendix 5) generates c. £5.2 million of additional expenditure capacity, which in turn provides for an additional floorspace requirement of c. 2,500 m² (gross) in 2010, rising to c. 3,200 m² (gross) in 2013.
11.24 In seeking to accommodate this capacity, PPS6 and UDP policies dictate that Stretford town centre should be the priority. However, given that achieving significant new provision will be dependent on the private owners’ aspirations for comprehensive redevelopment of the existing Mall; it is likely that alternative provision will need to come forward in the northern catchment to meet the overriding need for new non-bulky floorspace.

11.25 To this extent, notwithstanding the recent dismissal of joint appeals into the provision of a larger Tesco store, we consider that the Stretford Leisure Centre site is a realistic alternative to meet the quantitative need arising within the northern catchment. However, given the relatively convoluted planning history of the site, it is important within the context of this study, to briefly assess the retail planning issues arising from a large quantum of comparison goods floorspace coming forward at this out-of-centre location.

**Stretford Leisure Centre (Old Trafford)**

11.26 Whilst the quantitative need for additional convenience goods retailing on the site has been established through the grant of full planning permission (LPA ref: H/56481) for a medium sized Tesco foodstore (c. 4,500 m² gross), the main reason for proposals for a larger store (c. 8,200 m² gross) was to facilitate a significant expansion in comparison goods provision.

11.27 Although the proposals for a larger store were ultimately dismissed on PPS6 grounds relating to sequential compliance, the scope for disaggregation and retail impact, given that the quantitative need for additional comparison goods provision was accepted by all parties at public inquiry, we have sought to simply ‘roll forward’ the quantitative modelling (e.g. 10 minute drive-time catchment) in order to understand the present expenditure capacity to support a larger Tesco store than that presently permitted.

11.28 A full update of the quantitative capacity modelling exercise, utilising the latest MapInfo guidance (Brief 07/02) to ensure consistency with the approach agreed at public inquiry, is provided at Appendix 10. However, in summary, whilst there are several methodological differences between MapInfo and Experian in terms of expenditure growth rates, turnover efficiency growth and deductions for special forms of trading, the updated quantitative assessment identifies the following quantitative capacity to support the larger store proposals at Stretford Leisure Centre:

- **Convenience** – Surplus expenditure capacity of c. £51.5 million identified in 2008, rising to c. £66.5 million in 2011, which is the likely design year date. On the basis of the Tesco company average sales density, this quantum of surplus expenditure
capacity would support the equivalent of c. 4,500 m\(^2\) of convenience floorspace in 2008, rising to c. 5,800 m\(^2\) in 2011.

- **Comparison** – Surplus expenditure capacity of c. £104.5 million identified in 2008, rising to c. £211 million in 2011. This generates a floorspace capacity of c. 13,100 m\(^2\) of comparison floorspace in 2008, rising to c. 25,300 m\(^2\) in 2011.

11.29 However, in addition to the quantitative capacity identified, it is clear that the proposals for a larger Tesco store has a stronger qualitative justification than previously presented at public inquiry given its role as an integral part of a wider ‘enabling’ development package to facilitate the development of a new modern cricket stadium as part of the sports-led regeneration of the Old Trafford area.

11.30 To this extent, whilst we recognise that there is significant quantitative and qualitative merit in the case for a larger Tesco store as part of a wider sports-led regeneration of the Old Trafford area, we do not consider that the retail study is the appropriate vehicle in which to address the overriding PPS6 issues that precipitated the dismissal of the previous co-joined appeal. It will be for any application to ultimately satisfy outstanding concerns in relation to sequential compliance, the scope for disaggregation of the proposals and the retail impact, particularly in relation to Stretford town centre.

**Urmston (Western Catchment)**

**Convenience**

11.31 In assessing the potential for market share uplift in Urmston, given the forthcoming development of a new c. 4,500 m\(^2\) (gross) Sainsbury’s store in the town centre, we do not consider that there is any realistic scope for further market share uplift at this time given that a realistic market share cannot be accurately quantified at present. With the new foodstore not anticipated to open until 2009 at the earliest, we consider that any assessment of potential market share uplift in Urmston would be more appropriate as part of any future update to this retail study once trading patterns settle down and the trading performance of the new store and the wider town centre are known.

11.32 However, for information purposes only, we have sought to model a hypothetical increase in market share of the Urmston catchment to the levels of retention presently enjoyed by the Altrincham and Sale catchments (Main Food 70% retention; Top-Up Food 75% retention). At present, the Urmston catchment retains c. 47% of main food expenditure
and c. 68.5% of top-up food shopping, the majority of which is drawn to the large out-of-
centre Asda store at Trafford Park.

11.33 Ignoring the potential market share increase derived from the forthcoming Sainsbury’s
store development within the town centre, the increase in market share to the retention
levels commanded in the other catchment zones, provides a quantitative capacity of c.
2,000 m² (gross) in 2007, rising to c. 2,100 m² (gross) in 2013 and 2,200 m² (gross) in
2021. This capacity is clearly hypothetical and any further proposals within the Urmston
town centre would, in accordance with PPS6 guidance, not be required to demonstrate
quantitative need.

11.34 With respect to the wider western catchment zone, there is clearly an acute quantitative
and qualitative need for new convenience provision within Partington. This need is
specifically considered within the area-specific assessment later in this report.

**Non-Bulky Comparison**

11.35 Given that it is difficult to establish a realistic (baseline) market share for Urmston at
present due to the ongoing town centre redevelopment, we have not sought to model any
potential market share increases at this time and consider that the *Ask* scheme will meet
locally arising need as well as retailer demand. A review of future retail need within
Urmston should be considered more fully within any future update to this retail study.

**Borough-Wide Bulky Comparison**

11.36 Given the existing strength of out-of-centre retail parks (Altrincham, Trafford and White
City) in the Borough, which are all predominantly bulky-goods orientated, we do not
consider that there are realistic opportunities to significantly increase existing market
shares or the performance of the principal town centres.

11.37 Whilst the Council should actively encourage the provision of bulky goods retailers within
the existing town centres if commercial interest emerges, given that the existing town
centres within the borough are constrained in terms of the availability of suitable sites to
meet future identified retail capacity, we do not consider that the provision of new sites for
bulky goods development is a priority for the Council through the LDF.

11.38 We understand that at present there are several vacancies within the existing retail parks
that could satisfy short-term need and notwithstanding the capacity identified in the
baseline assessment, we consider that there is limited potential for new bulky goods
development in the short term outside of the established town centres and that expansion to out-of-centre retail parks or any other out-of-centre proposals should be considered in accordance with PPS6 guidance.
12. LEISURE

12.1 This section reviews the existing distribution of leisure facilities within Trafford, focusing in particular on the cinema, health & fitness and evening economy provision (restaurants, bars and night-clubs) within the principle centres within the Borough.

12.2 We have drawn upon the results of the household telephone survey, which included questions asking respondents where they go most often with respect to the following leisure activities: -

- Cinema;
- Gym / Health and Fitness Clubs;
- Bingo;
- Ten-Pin Bowling; and
- Dining / Socialising.

12.3 In addition to establishing the principal leisure destinations in the Borough, the household survey asked local resident opinions on what (three) improvements to the quality and range of leisure facilities in the Borough and its principle town centres would persuade households to visit that town centre more often. This informs a major part of our qualitative assessment of leisure provision.

12.4 However, prior to assessing what additional leisure facilities are required, we firstly highlight the most popular destinations amongst the Borough’s residents below, and consider the extent to which existing leisure provision is satisfying the needs of the catchment area. Our appraisal of the town centre’s present leisure offer is informed by the Experian GOAD In-centre report and complemented by on-site GVA fieldwork.

Cinema

Existing provision / visitation patterns

12.5 Given the recent development of the six screen Apollo multiplex on Denmark Street in Altrincham to compete and complement the large cinema complex at the Trafford Centre, the Borough is relatively well catered for geographically (north / south) in terms of cinema provision, particularly given the recent ‘polarisation’ in the cinema sector away from smaller suburban cinemas such as the Curzon in Urmston towards sub-regional scale complexes.
12.6 In terms of visitation patterns, the survey results highlight that the Denmark Street development in Altrincham town centre is very popular with local residents from the south and east of the borough with 55.1% regularly visiting from the immediate Altrincham catchment and a further 12.8% from the Sale catchment.

12.7 With respect to the north and west of the borough, the 20 screen (4,000 capacity) UCI cinema at the Trafford Centre is the most popular destination with 66.6% of the western (Urmston) catchment regularly visiting and 44.1% of the northern (Stretford / Old Trafford) catchment going there for cinema visits. Notwithstanding this competition, the Curzon cinema is still relatively popular with local residents in Urmston with 18% of the western catchment regularly going there.

12.8 In terms of the northern catchment, given the proximity and ease of access to Manchester City Centre, the sixteen screen AMC cinema at Great Northern and twenty three screen Odeon within the Filmworks are particularly popular.

Quantitative Need for new Cinema screens

12.9 Notwithstanding the good geographical spread of cinema provision across the Borough, given the continued rationalisation of the cinema sector towards sub-regional towns, it is useful to understand the theoretical quantitative capacity for new cinema screen provision so as to inform policy and development control decisions. Utilising published data from Dodona therefore, we have undertaken a generic quantitative need assessment for new cinema screen provision within Trafford Borough, based on comparison between the UK average of screens/head to the identified primary catchment population (catchment zones A – D).

12.10 The existing cinema provision is as follows:

- **Apollo Cinemas (Altrincham)** – 6 screens;
- **UCI (Trafford Centre)** – 23 screens (4,620 seat capacity); and
- **Curzon (Urmston)** – 2 screens (529 seat capacity).

This gives a total of 31 screens. A comparison against the average UK population per cinema screen, as set out below:
**Table 29 – Capacity for Additional Cinema Provision in the Catchment Area**

<table>
<thead>
<tr>
<th>Year</th>
<th>Survey Area Population (Zones A – D)</th>
<th>UK Population per Screen</th>
<th>Screens necessary to match UK Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>229,007</td>
<td>17,327</td>
<td>13</td>
</tr>
<tr>
<td>2010</td>
<td>230,151</td>
<td>15,068</td>
<td>15</td>
</tr>
<tr>
<td>2021</td>
<td>237,928</td>
<td>12,002</td>
<td>20</td>
</tr>
</tbody>
</table>

Note – All information sourced from Dodona Research – Cinemagoing 15 Report (March 2006)

12.11 It is clear that Trafford is relatively over provided for in terms of cinema screen provision and we consider that there is no quantitative or qualitative need for additional cinema screen provision within the borough. This would not however preclude policy compliant proposals coming forward such as the recent Altrincham proposals.

**Health & Fitness Facilities**

12.12 Within Trafford there has been considerable expansion in both the quantum and quality of gyms / health & fitness centres across the borough. The plan provided at Appendix 3 highlights the existing and also potential gaps in both public / private provision within the borough, as well as highlighting competing facilities.

12.13 Given the existing level of provision across the Borough, the survey results are set out on a sub-borough basis.

**Southern (Altrincham, Timperley, Hale and Hale Barns)**

12.14 The household telephone survey results highlight that the most frequently visited gym / fitness centres in the southern catchment were Altrincham Leisure Centre on Oakfield Road with 38.7% of responses, then the recently opened Total Fitness centre on Denmark Street (11.9%) and the Marriott (Airport) Hotel in Hale (9%). Patronage of Sale Leisure Centre and also the Total Fitness centre in Sale were also observed. The survey results suggest that there is no major outflow of patronage / expenditure to competing leisure centres outside of the borough, above and beyond those in Manchester City Centre, which is potentially attributable to travel to work patterns.
Western (Urmston, Flixton and Partington)

12.15 Whilst Urmston Leisure Centre remains the primary health and fitness destinations in the west of the Borough with 28% of responses from the western catchment, the main visitation flows are significantly influenced by the out-of-centre provision at the Trafford Centre with 9.9% using David Lloyd (9.9%) and 11% using the JJB centre. Partington Leisure Centre attracts 4.4% of responses and the George Carnell Leisure Centre in Davyhulme attracts 2.1%. The survey results highlight that there is little outflows of patronage and associated expenditure to centres outside of the catchment.

Eastern (Sale, Ashton-on-Mersey)

12.16 The eastern side of the borough is relatively well served by numerous public and private fitness / gym facilities, particularly centred around and in close proximity to Sale town centre. The concentration of provision within this catchment is particularly highlighted by the fact that there is no one primary (favoured) fitness destination, with 21.2% visiting Dragon's Health Club (Georges Road), followed by 19.3% of respondents using Sale Leisure Centre, 11.2% using Walton Park (Raglan Road) Centre and 10.2% using LA Fitness in Sale. As with the western catchment in particular, there are no significant visitations outside the borough, although 3.8% of respondents used David Lloyd at Trafford Park.

Northern (Stretford, Old Trafford)

12.17 Given the proximity and ease of access to Manchester City Centre, it is unsurprising that 11.3% of respondents visited the Virgin Active gym at the Great Northern. This fitness facility is marginally less popular than Stretford Leisure Centre, to which 13.2% of respondents visit, whilst the David Lloyd and JJB centres within the Trafford Park Regional Sports complex draw c. 15.4% of visits.

Bingo

12.18 The bingo industry has been subject to polarisation and is facing a period of readjustment due to internet competition and the no-smoking ban in public places.

12.19 In terms of existing visitation trends, the two primary bingo hall destinations are the Buckingham Bingo and Mecca Bingo Halls in Old Trafford and Sale, thereby providing a north – south balance. The Buckingham Bingo Hall attracts 7.2% of those who play from the southern (Altrincham) catchment, 23.9% from the western (Urmston / Partington)
catchment, 15.1% from the eastern (Sale) catchment and unsurprisingly 40.8% from the northern (Stretford / Old Trafford) catchment. In comparison, Mecca Bingo in Sale attracts 33.7% of those who play from the southern catchment, 19.9% from the western catchment, 37.5% from the Sale catchment, although none from the Old Trafford catchment due to the Buckingham Bingo on Chester Road.

12.20 With respect to competing centres, the household telephone survey results highlight that the Buckingham Bingo at East Didsbury as well as the Gala Bingo at Salford and Wythenshawe attract some visitors from Trafford although the visitation flows are low given the comparability of offer to that in Old Trafford and Sale.

12.21 Given that the recent market trend within the Bingo sector has been towards large-scale venues with wide catchment zones, it is considered that there is likely to be limited demand for additional facilities within Trafford.

**Ten-Pin Bowling**

12.22 The major expansion in ten-pin bowling in the late 1980’s and early 1990’s has given way to a period of consolidation, in light of changing leisure trends, with provision rationalised into larger sub-regional scale provision focussed in out-of-centre leisure parks. This market trend is highlighted by the recent closures of the XS Superbowl (Worsley) and more pertinently to this study, the Megabowl at White City Retail Park, which was demolished as part of the Retail Park extension.

12.23 With specific respect to the Borough, the Namco Station at the Trafford Centre is the primary destination for residents with 16.3% visiting from the southern (Altrincham) catchment, 43.6% from the western (Urmston) catchment, 59.4% from the eastern (Sale) catchment and 20.8% from the northern (Stretford / Old Trafford) catchment. This is notwithstanding considerable inflows from outside the borough to Namco, from the Salford / Eccles catchment (84.1%) for example.

12.24 However, the survey results do highlight that residents in the southern (Altrincham catchment) are visiting competing centres quite considerably with the Megabowl at East Didsbury and Stockport attracting 41.3% and 14.7% of respondents respectively, whilst the Quattro Leisure bowling facility in Warrington attracts 10.9% of respondents.

12.25 These outflows from the southern catchment in particular suggest that there is potentially a quantitative deficiency in ten-pin bowling provision in the south of the Borough and the Council should seek to encourage any policy compliant proposals if they emerge.
New Hotel Provision

12.26 Whilst hotel provision within the Borough is relatively good, the major recent hotel developments have tended to focus towards the north of the Borough to cater for visitors to The Trafford Centre and also Old Trafford (Football / Cricket). Whilst there is also some hotel accommodation provided along the A56 corridor, it is apparent that there is an ageing profile and lower quality of hotels towards the south of the Borough.

12.27 This ‘ageing’ profile, coupled with the major recent expansion in hotel provision in Manchester City Centre and close to Manchester Airport, is providing a significant challenge to Trafford’s existing hotel accommodation base. Therefore, whilst it is positive to note that the emerging Altair proposals include hotel bedspace the Council should actively seek to encourage a qualitative and quantitative improvement within policy compliant provision towards the south of the Borough.

Dining and socialising

12.28 Given that PPS6 actively encourages the diversification of uses within town centres so as to appeal to a wide range of age and social groups, our town centre health-check exercise, suggests that a large part of the evening economy within the principal town centres in Trafford is predominantly focussed around non-family orientated ‘drinking establishments.

12.29 Recent developments such as Denmark Street and Sale Waterside accommodating national family-orientated restaurants such as Chiquito, allied to a number of quality, independent restaurants, dining provision within Sale and Altrincham town centres has improved considerably and provides a viable evening destination to compete with Manchester City Centre.

12.30 There is however scope for further improvement. The recently opened Great Hall at the Trafford Centre has attracted several national and local chain restaurants (Pesto, Carluccio’s, Pizza Express and Las Iguanas). Whilst the existing quality, independent restaurant offer also gives the towns within Trafford their distinctiveness, attraction of such national restaurants would diversify the town centre evening economy offer in qualitative terms. It is therefore encouraging that Pizza Express has an outstanding requirement for premises within Altrincham town centre, where the attraction of such higher order retailers would further consolidate and reflect on its role as a sub-regional centre within the Manchester City region.
12.31 With respect to the other principal town centres within Trafford such as Sale and Urmston, dining provision generally reflects the general traditional high street mix of Chinese, Indian, Italian and latterly Spanish restaurants. However, given the existing catchment demographics, there is scope to further improve on the restaurant offer within the main town centres and advice from our retail and leisure agents suggests that both towns are viewed in a positive light by potential occupiers. This is reflected in the existing interest from higher order national restaurant chains for accommodation within the Ask redevelopment of Urmston.

12.32 At the other end of the spectrum, several smaller centres to the south of the Borough such as Hale have evolved into ‘gastro’ destinations serving their affluent catchments. Whilst beneficial interims of centre vitality, there will be a requirement to monitor the concentration of such uses in terms of potential effects on the retail function.

12.33 With respect to A4/A5 takeaway uses, an over concentration of such uses can cumulatively impact upon the character and function of respective centres and it is important that the Council continue to monitor such uses so as to ensure the amenity of surrounding residential areas.

**Ice Arena**

12.34 The provision of a new ice arena as part of the Altair development will add significantly improve Altrincham’s status as a sub-regional destination for leisure activities. The ice arena will qualitatively differentiate Altrincham from other competing centres in the sub-regional retail hierarchy (the other nearest ice arenas being at Blackburn and Deeside) and has the potential as a family orientated activity, to significantly increase dwell times within the centre. This is in addition to Altrincham being the home venue for the *Manchester Phoenix* Ice Hockey Club, who play in the Elite National Ice Hockey League and attract reasonable crowds.

**Summary**

12.35 On the basis of a quantitative and particularly qualitative assessment of the borough’s present leisure provision, we consider that:

- The Council should carefully monitor the evening economy as an over-concentration of evening economy leisure uses could cumulatively impact upon the character and function of the respective town centres;
• Family orientated drinking/dining establishments should be encouraged to increase dwell times within the town centre. The attraction of higher quality restaurants to Altrincham in particular will help to distinguish and improve the centre as a leisure destination within the sub-regional hierarchy;

• Cinema provision within the borough is good with the recent opening of the six screen Denmark Street (Apollo) multiplex in Altrincham ‘filling’ the quantitative gap in provision that previously existed for residents in the south of the Borough. Given the continued rationalisation of the cinema sector into smaller sub-regional towns, we consider that there is limited potential for developing new cinema provision in the borough;

• There is adequate provision of existing public / private health and fitness facilities within the borough and the household survey suggests strong patronage from local residents of the public gym centres in particular;

• There is adequate provision of large bingo halls serving both the north and south of the borough particularly well. Therefore, given that the market trend has been towards larger bingo centres in higher order centres, we consider that there is limited scope or need to provide new bingo facilities within the borough at present; and

• Whilst the Namco bowling station at the Trafford Centre is very popular with local residents, particularly from the north and west of the borough, there is a quantitative gap in provision towards the south of the borough to serve Sale and Altrincham, with local residents visiting East Didsbury in particular. However, given the recent rationalisation of the sector, new development in the south of the borough may not be commercially realistic.
13. TOWN CENTRE DEVELOPMENT OPPORTUNITIES

13.1 Having established the baseline capacity position and set out the potential future growth scenarios, it is necessary to review the potential of the respective town centres within the Borough to accommodate additional retail development. The potential for future retail development within the three district centres within the Borough (Hale, Sale Moor and Timperley), as well as Partington local centre is considered within the area-specific assessments later in this report.

13.2 The assessment of potential development sites within the main town centres will allow the Council to develop a front-loaded Local Development Framework (LDF) and will encourage a meaningful response from the local community and key stakeholders on a genuine choice of options for retail uses. In turn, it will assist the Council in agreeing an area-specific vision, defining key objectives for the LDF and also defining a spatial strategy which will be consistent with other policy documents.

13.3 Therefore, in accordance with the study brief and the PPS6 requirement to identify a range of sites and locations; analysis has had regard to both existing UDP allocations and other potential ‘windfall’ locations and is informed by agency and market advice.

Altrincham

13.4 The adopted UDP town centre boundaries for Altrincham are relatively well defined by major roads, surrounding residential areas and the townscape considerations of Conservation Area designation. On this basis, we consider that there is a limited supply of potential development sites to accommodate substantial future growth within the town centre. Several major town centre development sites which were identified within the existing adopted UDP, such as the Denmark Street / Railway Street site have already been developed and are no longer available.

13.5 Therefore, in considering as to where the future retail need in Altrincham town centre will be met, we consider that the land presently allocated (policy S6) to the east of Stamford New Road / Railway Street for a mix of town centre uses is the only significant development site to meet identified need in the short to medium term. This site is presently being brought forward as the Altair development.
Town Centre Site 1 - Altair Development

13.6 The Altair development is a joint venture proposal between David McLean / Nikal Developments and Trafford Council. It occupies a significant town centre development site as identified within the adopted UDP map extract below.

13.7 The general development principles have been the subject of extensive pre-application discussion with the Council and a potential scheme which comprises the following schedule of uses has emerged:

- c. 12,000 m$^2$ (gross) of open retail (class A1) floorspace;
- c. 2,000 m$^2$ (gross) of retail leisure (class A3) floorspace;
- 100 bed hotel and health club;
- c. 8,500 m$^2$ of offices;
- 150 residential units; and
- c. 3,000-seat capacity ice arena.

13.8 In terms of the retail elements of the scheme, the promotional literature describes that the scheme will be specifically focussed towards higher order comparison retailing, introducing a new element to the Altrincham town centre offer which will provide distinct units with height, quality and contiguous shop frontages, occupied by significant retail brands not already present within the town.

13.9 The proposal is still clearly evolving and no potential uses or operators have been formally confirmed. However, a public consultation exercise is due to commence in late November 2007 in advance of a planning application, which is expected in December 2007. The scheme unlikely to open before 2011.

13.10 We consider that retail-led mixed-use development of the site will significantly contribute both in quantitative and qualitative terms to the existing town centre offer in Altrincham and attract residents from a wider catchment who may ordinarily rely on other centres.
However, given that the Altair site sits to the east of the railway and is physically detached from the existing primary shopping area, it will be particularly important to ensure that the scheme is physically integrated with the town centre and that an attractive retail circuit is established so as not to significantly displace the retail emphasis away from the traditional retail areas.

13.11 Notwithstanding this minor concern, we consider that the Altair development is the only large development site opportunity within the defined town centre that can realistically deliver a significant uplift in Altrincham’s standing in the sub-regional retail hierarchy. The development of a new ice rink, hotel and residential apartments will enable the town centre to diversify its town centre offer and the scheme has the potential to attract higher order comparison retailers to the town.

2) Other Town Centre Opportunities

13.12 Notwithstanding the Altair site being the only realistic site on which to deliver a significantly amount of new development, we have identified several areas of transition where the Council should seek to secure physical improvements in the townscape in order to improve the physical approaches to the town centre.

a) George Street

13.13 Whilst not identified as a development site opportunity in the adopted UDP, in light of the ongoing redevelopment of the Stamford Quarter and the emerging Altair proposal, we recommend that the Council actively encourages physical improvements (urban design, environmental quality, modernisation etc.) to the existing retail accommodation towards the southern end of George Street.

13.14 Improvements to the southern end of George Street will be important in order to maintain the existing retail circuit within the town centre and prevent the area from becoming a more secondary shopping destination. To this extent, the redevelopment of the existing JJB and
Superdrug stores by Mere Park Developments to provide new retail accommodation is encouraging and further proposals need to be encouraged in order to materially improve the shopping environment.

b) Greenwood Street

13.15 This development area is located within a historical part of Altrincham town centre and is identified by the adopted UDP for regeneration and redevelopment to provide a mix of uses, including retail, commercial and residential as well as the potential conversion of the General Hospital if it closes.

13.16 Given that the area is detached from the primary retail shopping area and comprehensive redevelopment will be difficult given that the identified site is located within an existing conservation area and is bounded by residential dwellings, we consider that the site offers limited potential as a retail development site.

13.17 However, we recommend that the Council should continue to promote the areas improvement through the LDF process given that the site constitutes a highly important ‘transitional’ area between the existing primary retail areas and the wider town centre. The Council should seek to improve pedestrian linkages and the physical integration between the main shopping areas with the Market Hall.

c) Woodlands Road / Springfield Road (Mixed-Use Quarter)

13.18 With the ongoing redevelopment of the Stamford Quarter, we consider that there is an ideal opportunity to enhance the physical relationship between the primary shopping areas on George Street and the office quarter focussed along Woodlands Road, which occupies the prominent town centre frontage on to the A560 / A56.

13.19 Given the existing mix of uses within this transitional area, we consider that the Council should focus on bringing forward a design-based strategy for this area given the piecemeal nature of redevelopment. With the Stamford Quarter turning its back on Victoria Street, we
consider that there is the opportunity to consider the potential to improve physical linkages between the two distinct areas and provide attractive pedestrian links.

3) Future Development Site – Leisure Centre / Oakfield Trading Estate

13.20 Whilst the Stamford Quarter redevelopment and the Altair scheme will meet future retail needs in the short to medium term, with the limited availability of relatively good sized potential development sites within or immediately adjoining the town centre, we consider that the existing Leisure Centre and Oakfield Trading Estate site, as identified on the plan below, could meet longer term town centre need.

13.21 The site sits adjacent to Altrincham Interchange and thus in a highly sustainable location and presently supports the town’s leisure centre as well as several small trading units and a garage depot. Whilst a replacement leisure centre as well as the appropriate relocation of the existing businesses within the locality would be required prior to any site assembly or redevelopment, the site offers the long term to accommodate a new comparison goods development subject to a review of how the Stamford Quarter and Altair schemes perform.

Sale

13.22 With the town centre boundaries being relatively tightly defined and town centre opportunity sites such as Sale Waterside and The Square Shopping Mall redevelopment having been recently completed, there are limited major development opportunity sites within the town centre. However, the following opportunities have been identified.
1) **Aldi Site (School Road / Hereford Street)**

13.23 Extant planning permission exists (LPA ref: H/62827) for the development of a new Aldi foodstore and three non-food retail units; however we understand that the scheme may not be brought forward due to commercial reasons. The site has however been cleared in advance of redevelopment, it occupies a prime location on the primary retail frontage and is of a sufficient size and depth to enable a medium sized retail unit to be accommodated. On this basis we consider that the Aldi site remains a significant town centre development opportunity.

13.24 Given the depth of convenience offer within Sale town centre at present (M&S Simply Food, Sainsbury’s and Tesco) it may be that the Aldi site represents a more suitable opportunity for the town centre to expand and strengthen its non-food retail offer.

13.25 It is not unreasonable to suggest that a new medium-sized non-bulky comparison store (or indeed two separate reasonably sized units) could be brought forward on the Aldi site. This would deliver a greater qualitative uplift to the existing town centre offer than another foodstore.

13.26 We therefore recommend that should the foodstore development not progress in accordance with existing planning permission then the Council should seek to allocate or encourage the redevelopment of the Aldi site for mixed-use development comprising class A1 non-bulky comparison retail on the ground floor with residential accommodation above. We consider a mixed-use scheme of this type would deliver significant qualitative benefits to the town centre in the future.
2) Former Kwik Save Store (School Road)

13.27 The former Kwik Save store on School Road has been vacant for a considerable period of time and represents a good short-term opportunity to increase the town centre offer, either through conversion or redevelopment.

13.28 Given the identified quantitative and qualitative deficiencies in the town centre comparison goods offer, we recommend that the Council should actively seek to encourage the ‘recycling’ of this floorspace for non-food retail uses. We consider that this site could provide an immediate and cost effective opportunity. The development of a non-food retail store at this location would also assist in ‘stretching’ the primary retail frontage given that the prime School Road retail frontage towards Chester Road is presently secondary in nature with a concentration of small lower order retailers and non-retail uses.

3) Washway Road / Hayfield Street

13.29 The site is identified within the adopted UDP (policy S7) as appropriate for town centre uses and occupies a significant frontage on to Washway Road (A56). With the southern part of the site accommodating a standalone Marks & Spencer Simply Food store and a recently completed mixed-use development at 21 – 23 Washway Road (LPA ref: H/56361), there is a potential opportunity to significantly improve the existing retail frontages on the northern part of the site towards School Road.
13.30 The northern part of the site is presently occupied by a number of lower order retailers and does not add significantly to the existing town centre offer. Whilst it is understood that the Council owns some parcels of land within the development site, the site is potentially in a wide range of ownerships and we therefore recommend that the Council should encourage the amalgamation of existing units fronting Washway Road / School Road. The provision of larger and more modern floorplates will encourage national multiple retailers and significantly assist in re-establishing the retail circuit along the western end of School Road given that it is presently by-passed by local shoppers using Sainsbury’s, Sale Waterside and The Square Shopping Mall.

13.31 Improvement on the retail frontage on to Washway Road is also supported by the adopted A56 Corridor Supplementary Planning Document (SPD), which identifies the Washway Road area as an opportunity site along the road corridor.

4) Broad Road / Wharf Road

13.32 We consider that the existing Q&S Fashions site at the junction of Broad Road and Wharf Road represents a positive opportunity to secure new mixed-use development, potentially comprising ground floor retail / town centre uses with residential accommodation above.

13.33 The mixed-use redevelopment of the site would secure qualitative improvements in the townscape and would complement the ongoing mixed-use development along the Bridgewater Canal corridor at Sale Waterside. Looking further afield comprehensive redevelopment of the wider site would ensure an appropriate transition between the town centre and surrounding residential areas.

5) Hope Road / Northenden Road

13.34 The existing Mr Q’s public house, which is served by its own relatively large car park, offers a potential opportunity for mixed use development given its location adjacent to Sale Metrolink station. A planning application for c. 50 residential apartments with three retail units fronting on to Northenden Road is presently with the Council for determination.
6) Mecca Bingo Site

13.35 Whilst there has been tentative commercial interest in redeveloping the site for retail uses, we consider that the site sits outside the town centre, it would not be capable of creating any physical linkages with the primary retail area given Washway Road (A56), we do not consider the site to be appropriate for retail development in the short to medium term. Therefore, in accordance with PPS6 guidance, we recommend that the Council pro-actively seeks to address the retail deficiencies within the town centre.

Stretford

13.36 Stretford town centre is largely focussed on Stratford mall; whilst it offers purpose built floorspace it is now dated and the shopping experience it offers suffers by comparison to provision elsewhere.

13.37 Some recent positive improvements have been made by the Mall owners in terms of redeveloping the market place and the proposed extension to the Wilkinson’s store, it is clear however that the Mall is not meeting local residents shopping needs or expectations. We consider that the overall shopping experience is detracted by a combination of several factors:

- The exterior façade of the Mall and the existing centre layout configuration, which is visually unattractive and creates an inward looking centre which ‘turns its back’ on one of the most prominent retail frontages (A56) within the Borough;
- The lack of permeability through the town centre with pedestrian accessibility to the Mall cut-off from surrounding residential areas by several major arterial routes (Chester Road / Kingsway);
- Poor car parking and highways access arrangements preventing the town centre from capturing a significant quantum of passing trade;
- The lack of a diversity of uses within the town centre, including residential uses; and
- The lack of a higher order foodstore anchor for the town centre with the existing Tesco Metro being a first generation store, which does not accommodate a full non-food offer in comparison to the larger higher order out-of-centre Asda stores at Trafford Park and Hulme.

13.38 On the basis of the above, we consider that there are two principal options for securing future improvements to the town centre.
1) Physical Improvements (non-intrusive works)

13.39 Given that PPS6 recognises the importance of good design to deliver town centre success, the less intrusive approach to improve the town centre layout would be to seek to secure a detailed package of physical improvements to the Mall in order to improve the overall shopping experience for local residents.

13.40 Working in conjunction with the existing Mall owners, a package of physical improvements including urban design improvements to the exterior façade, more prominent signage and the development of a coherent access / movement strategy to improve the permeability of the town centre should be developed in order to guide the regeneration of the existing facilities. This design-led policy framework, which could potentially be brought forward through an area-specific policy, should also include public realm improvements such as the creation of a public square and the reconfiguration of the existing external areas surrounding the Mall, such as the present car parking areas, in order to create an efficient parking and access layout.

2) Comprehensive Redevelopment

13.41 A more interventionist approach to improve the performance of Stretford town centre would be for the Council to seek to actively pursue the comprehensive redevelopment of Stretford Mall through encouraging a mix of land uses to create a vibrant and sustainable town centre. This would include the provision of a new large higher order foodstore to anchor the town centre, which has initially been suggested as a potential future option by the Mall owners during the course of the co-joined inquiry into the larger Tesco store proposals at Stretford Leisure Centre.

13.42 We consider in any event that the Council should actively seek to extend its existing policy support (policy S8) to strongly promote the diversification of the town centre to include residential uses in order to create a viable mixed-use centre.

13.43 However, given the complexities in securing the comprehensive redevelopment of a privately owned site of this scale, we recommend in the first instance that the Council should seek to work with the existing Mall owners in order to provide a planning framework for change. For example, the production of a formal Development Plan Document (DPD) for Stretford town centre could guide and stimulate regeneration, resolve conflicting objectives and focus the delivery of area-based regeneration.
3) Other Development Opportunities

13.44 Above and beyond the existing physical extent of Stretford Mall, there are few development site opportunities that could potentially contribute towards the longer-term viability and diversification of the town centre retail offer. However, the Newton Street / Lacy Street car park site could potentially accommodate a new bulky goods development given its prominent location at the junction of Chester Road and Wilbraham Road.

13.45 Whilst the site is presently located outside of the adopted UDP town centre boundary and physically detached from the existing town centre, the development of bulky retail uses on this site would assist in diversifying the existing retail offer. We recommend therefore that the Council seek to extend the extent of the present development site to include the existing sorting office and other on-site uses, as the plan below highlights, subject to suitable relocation.

13.46 With respect to the Essoldo Cinema, given that the former cinema building is a Grade II listed building, we consider that it would be difficult to secure a commercially viable retail use for the site. Therefore, we would recommend that the Council should continue to seek to maintain the existing policy promotion through the LDF and consider the possibility of producing a Design Brief or SPD in order to generate commercial interest or attract public funding to bring forward appropriate uses for the presently vacant site.

Urmston

13.47 The Ask town centre scheme will deliver the major development opportunity within the existing town centre (the Shopping Precinct). The town centre is tightly defined by surrounding residential areas and there are very few additional development opportunity sites within the town centre. The main opportunity we have identified within the town centre is Victoria Parade and the row of existing units (Nos. 3 – 13) on Station Road, as set out in the plan below.
1) **Victoria Parade**

13.48 Located near to Urmston station and accessed from Higher Road, Victoria Parade is a 1960’s precinct development of poor design quality with narrow circulation space and small unit sizes. Whilst anchored by a small Somerfield store, the existing retail offer is poor with several vacancies and it is clear that the Parade does not contribute in qualitative terms to the existing town centre retail offer.

13.49 In physical terms, given that the Parade ‘turns its back’ on the existing retail circuit and lacks a prominent frontage on to Station Road, we consider that redevelopment represents a good opportunity to significantly improve the retail offer to the south of the railway, which is already predominantly secondary in nature and complement the wider town centre regeneration which is shortly to commence.

13.50 Therefore we recommend over the forthcoming LDF period that the Council identifies the site as an area for improvement within the town centre, being suitable for retail-led mixed-use development with significant emphasis on improving the overall physical environment within the area and the sites linkages / integration with the existing retail circuit.

2) **Qualitative Improvements**

**Market Place**

13.51 The market place in Urmston is located away from the primary shopping areas of the town centre and lacks any direct physical linkages.

13.52 Therefore, whilst we understand that the market is privately owned, we consider that the Council should seek to secure qualitative improvements in the physical environment so as to increase the attractiveness of the market to local residents. This may be achieved through a Town Centre Strategy rather than formal policies within the forthcoming LDF. Such development would work with the locally listed status of the market.
Station Road

13.53 In addition to securing improvements to Victoria Parade, the Council should focus on improving the overall physical environment on Station Road, investing in improvements to enhance the ‘shopping experience’ (e.g. street furniture) as well as managing / restricting an over-concentration of A3 – A5 service uses.
14. AREA-SPECIFIC ASSESSMENTS – DISTRICT CENTRES

14.1 In accordance with the requirements of the Brief this section seeks to specifically assess the potential for future change within the three district centres of Hale, Sale Moor and Timperley.

14.2 A key starting point in assessing the potential for future change in the respective district centres is to consider the function and retail composition of the respective centres in light of the PPS6 (Annex A), which defines that a district centre should usually comprise:

’a group of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as public facilities such as a library’.

PPS6 goes on to clarify that a superstore is a self-service store of usually more than 2,500 square metres (m²) of trading floorspace whilst a supermarket is defined as being usually less than this level of floorspace.

14.3 None of the three district centres contain a superstore or any large supermarket with the majority of local residents looking to the larger centres (Altrincham and Sale) to meet their main food shopping needs, and further afield to meet their high street comparison, bulky and DIY requirements.

14.4 In considering the scope for change, the historical nature of each of the district centres, essentially around main road junctions, constrains the physical capacity of any of the district centres to accommodate substantive retail development. The district centres are predominantly linear in nature and the retail provision is located on the main road frontages with residential dwellings to the rear; the tightly drawn adopted UDP district centre boundaries reflect this broad arrangement.

Hale District Centre

Physical Configuration / Retail Composition

14.5 Hale lies 2 miles to the south west Altrincham. It is an attractive district centre tightly defined by the Manchester – Chester railway line to the west of the main retail frontage
and closely surrounded by residential dwellings on all other fronts. The centre is primarily focussed along Ashley Road and supports a small Somerfield store alongside a number of independent convenience and comparison ‘niche’ retailers. Convenience provision within the district centre is presently changing with the construction of a new small-scale Tesco Express store on Ashley Road as well as the conversion of the former Iceland store into a new organic foodstore (As Nature Intended). There is a strong leisure offer with several restaurants, bars and ‘deli style’ coffee shops.

**Scale of Retail Provision**

14.6 Notwithstanding the recent expansion of the convenience offer, Hale’s convenience retail provision is still relatively small-scale and serves a primarily top up function. The main Somerfield store within the district centre comprises c. 500 m$^2$ (net) of convenience floorspace whilst the newly constructed Tesco Express is circa 340 m$^2$ (net). Whilst these stores are complemented by a range of local convenience stores it is clear that the centre does not contain a district centre convenience offer as expected by PPS6.

14.7 This secondary or top-up shopping role of Hale district centre is demonstrated by the household telephone survey results for the Hale postcode sector (WA15 9).

**Table 30 – Hale Catchment Survey Results**

<table>
<thead>
<tr>
<th>Hale</th>
<th>Main Food Market Share (%)</th>
<th>Top-Up Market Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>WA15 9</td>
<td>WA15 9</td>
</tr>
<tr>
<td>Booth’s (Knutsford)</td>
<td>5.9%</td>
<td>0%</td>
</tr>
<tr>
<td>M&amp;S (Altrincham TC)</td>
<td>5.9%</td>
<td>6.7%</td>
</tr>
<tr>
<td>Sainsbury’s (Altrincham TC)</td>
<td>29.4%</td>
<td>6.7%</td>
</tr>
<tr>
<td>Tesco Extra (Altrincham TC)</td>
<td>58.8%</td>
<td>53.3%</td>
</tr>
<tr>
<td>Somerfield (Hale DC)</td>
<td>0%</td>
<td>13.3%</td>
</tr>
</tbody>
</table>

*Source: NEMS Household Telephone Survey (Postcode Sector Results). Survey results do not add up to 100% due to survey weighting given the variances in sample sizes across the defined catchment zones.*

14.8 As the survey shows, local residents from the Hale postcode predominantly look towards the Tesco Extra in Altrincham to meet both their main food and top-up shopping needs. Whilst this is not unexpected given the close proximity and ease of access to Altrincham,
the survey results also show that very few people shop in local convenience stores within Hale district centre and in particular the Somerfield store. Recent new convenience provision is likely to add to the top-up offer but is unlikely to significantly expand the main convenience attraction.

14.9 With respect to the non-convenience retail offer, the Council’s updated centre survey clearly shows that Hale has a relatively healthy and thriving comparison goods retail offer (c. 3,000 m\(^2\) gross) which is primarily focussed on boutique style clothes shops, alongside several antique and soft furnishing shops. These niche independent shops clearly benefit from the affluent catchment area from which Hale draws upon.

14.10 In terms of the present viability of the district centre, the updated district centre survey results highlight that there is presently c. 500 m\(^2\) (gross) of vacant floorspace within the centre. However, the vacancies primarily relate to secondary frontages and are more representative of the natural floorspace turnover within a centre rather than any underlying structural problems with the centre. To this extent, our health-check assessment confirms that Hale is very viable district centre.

14.11 Complementing the retail offer, Hale is a very popular social / leisure destination in terms of the number of small bars, restaurants and deli style cafes located on Ashley Road. This is in addition to a substantial non-retail service offer (e.g. banks).

**The Potential for Future Change in Hale**

14.12 On the basis of the above, we consider Hale to represent a viable and vibrant District Centre which, with the exception of its convenience retail offer, meets the local day-to-day shopping and service needs of its catchment.

14.13 Given its relatively affluent catchment, we expect that the district centre will continue to evolve and distinguish itself as a niche retail destination for local residents, focussing on its existing mix of leisure and boutique style shops. In convenience (food) shopping terms, we expect that the recently opened Tesco Express and As Nature Intended organic foodstore on Ashley Road will significantly improve Hale’s convenience existing market share for top-up goods in particular. The new stores will also secure a qualitative uplift in the district centre convenience retail offer.

14.14 In terms of future development opportunities, we consider that there are two (linked) potential development site opportunities, namely the Britannia Ashley Hotel complex and the car park area to the rear of the Bowling Green which fronts on to Ashley Road.
Plan 1 - Hale District Centre – Ashley Road Site

14.15 Whilst the redevelopment potential of the existing Somerfield / Ashley Hotel site is constrained by third party ownership and tenancy issues, we consider that the site represents the best opportunity within the district centre to accommodate substantive new development.

14.16 The development of a new foodstore (of an appropriate scale) on the site should be actively encouraged by the Council as there is significant potential to deliver a qualitative uplift in retailer representation beyond the existing Somerfield offer. Notwithstanding the qualitative improvements that could be secured, the redevelopment of the site would also secure significant townscape improvements for the district centre.

14.17 In addition, we consider that assimilation of the existing car park site adjacent to the hotel complex into the development site could present a reasonable development opportunity, subject to satisfactory relocation of the existing occupiers and appropriate re-provision of existing car park spaces either within the development site or elsewhere within the district centre. The Bowling Green site has not been identified for redevelopment given that it would be highly contentious in townscape and in PPG17 terms.

14.18 Notwithstanding the above, given the constraints to the development of the opportunity sites identified, potentially the main focus for future change within Hale district centre will be its continued growth as a high quality ‘social’ destination. Whilst the diversification of the district centre offer should be encouraged, the over concentration of evening economy leisure uses in particular, such as late night-time bars in smaller centres could begin to cumulatively impact upon the character and function of the centre and in particular impact upon the amenity of surrounding residential areas.

14.19 Therefore, we recommend that the Council closely monitors the quantum of non-retail (leisure) provision within Hale and considers bringing forward development control policies to ensure that any future leisure development does not detract from the present role of the
district centre or lead to an over concentration of uses. As the district centre is relatively well maintained, we consider that there is limited scope for significant environmental improvements / enhancement.

**Sale Moor**

**Physical Configuration / Retail Composition**

14.20 Sale Moor, which has grown around the junction of Northenden Road and Marsland Road, lies c 1.5 miles to the south east of Sale town centre. The centre serves a localised, predominantly residential catchment and this is reflected in the relatively small quantum of floorspace within the centre.

14.21 The adopted UDP district centre boundary is drawn tightly around the main retail frontages and the majority of retail units are converted former residential dwellings. Sale Moor district centre accommodates a small *Spar* store as well as a number of independent convenience and comparison retailers. Several restaurants, takeaways and non-retail service outlets (e.g. banks / hair salons) complement the retail offer.

14.22 The health-check assessment finds that the district centre is viable and well represented with independent and localised concerns.

**Scale of Retail Provision**

14.23 Given that the main convenience retail provision is provided by a small *Spar* convenience store and that the convenience retail provision within the district centre only totals c. 600 m$^2$ (net), it is clear when assessed against the PPS6 definition of a district centre that Sale Moor's existing convenience retail offer is lacking in both scale and breadth.

14.24 The household telephone survey results for the M33 2 postcode, which we consider to be Sale Moor's natural retail catchment, reinforces the relatively limited role the district centre plays in the local retail hierarchy.
Table 31 – Sale Moor Catchment Survey Results

<table>
<thead>
<tr>
<th>Sale Moor</th>
<th>Main Food Market Share (%)</th>
<th>Top-Up Market Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Shops (Sale Moor DC)</td>
<td>0%</td>
<td>4%</td>
</tr>
<tr>
<td>Tesco Express (Manor Avenue)</td>
<td>3.9%</td>
<td>3.1%</td>
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<tr>
<td>M&amp;S Simply Food (Sale TC)</td>
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<td>3.1%</td>
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<td>Local Shops (Sale TC)</td>
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<td>18%</td>
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<tr>
<td>Sainsbury’s (Sale TC)</td>
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<td>Tesco (Sale TC)</td>
<td>39.2%</td>
<td>21.9%</td>
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<tr>
<td>Tesco Extra (Baguley)</td>
<td>11.8%</td>
<td>3.1%</td>
</tr>
</tbody>
</table>

Source: NEMS Household Telephone Survey (Postcode Sector Results). Survey results do not add up to 100% due to survey weighting given the variances in sample sizes across the defined catchment zones.

14.25 It is evident therefore that Sale Moor does not perform as either a main food or secondary top-up function, with local residents looking to higher order stores within the larger centres to meet their shopping needs.

The Potential for Future Change in Sale Moor

14.26 Sale Moor shares many of the same issues as Hale district centre in that it lies in close proximity to higher order centres and that there is limited scope for physical change given the linear configuration of the existing retail centre and the close proximity of residential areas which constrain future development.

14.27 However, in order for Sale Moor to begin to function as a district centre in convenience retail terms, the Council should seek to encourage the development of a new foodstore of an appropriate scale in order for the centre to retain more expenditure, particularly in relation to top-up food shopping.

14.28 To this extent, we consider that the Car Wash / Warrener Street site, which extends to 0.56 hectares and is located entirely within the existing adopted UDP district centre boundary, would provide a suitable site for a new supermarket to anchor the district centre. The development of a new foodstore would provide local residents with a genuine alternative to
the higher order stores in Sale town centre and would contribute towards the district centre retaining more convenience expenditure.

**Plan 2 – Sale Moor Development Site**

14.29 We understand that part of the site identified (excluding the place of worship) has been subject to an outline planning consent for the development of a supermarket (c. 1,150 m$^2$ gross). Whilst this consent has now lapsed, we consider that the site, given its prominent location and good frontage, would be commercially attractive to retailers and offers an excellent opportunity within the district centre.

14.30 To this extent, we recommend that the Council should seek to specifically allocate the site for a new foodstore (subject to satisfactory relocation of on-site uses) of a scale appropriate to a district centre (up to c. 2,500 m$^2$ gross) through the LDF process.

14.31 In addition to the quantitative and qualitative improvements that would be derived from the development of a new supermarket in Sale Moor, it will be important for the Council to continually monitor the level of vacancies within the district centre as well as maintaining its investment in the physical improvements. It is also recommended that the Council actively manage the number of takeaway (class A5) uses within the district centre given the potential for these to detract from the viability of the centre and also create amenity issues for surrounding residential areas.

**Timperley District Centre**

**Physical Configuration / Retail Composition**

14.32 Timperley district centre has grown historically around the crossroads between Park Road and Stockport Road. The historical growth of retail provision within the centre is reflected in the adopted UDP district centre boundary which is tightly drawn around the main retail
frontages. Retail units reflect the conversion of former residential dwellings to produce larger retail floorplates and frontage.

14.33 Timperley is the smallest district centre in Trafford in terms of the quantum of retail floorspace; the convenience offer comprises two small Co-Op stores and an Iceland. This floorspace provides an essentially top up offer and it is clear from that Timperley plays a more secondary role with the majority of residents looking to Altrincham to meet their local shopping needs. Outside of this, the district centre has a large non-retail service offer (banks etc.) in addition to public facilities such as the library. To this extent, the health-check assessment suggests that the centre is viable and reflects the relatively affluent catchment area to which it sits.

**Scale of Retail Provision**

14.34 Given the convenience expectations of PPS6 for a district centre, it is clear from a review of the existing foodstore provision within Timperley that the centre wider performs in convenience terms with Iceland having a net retail floorspace of 425 m² and the two Co-Op stores having a net total floorspace of c. 550 m². Notwithstanding the other local convenience shops within the centre, it is clear that the convenience floorspace offer is more akin to that usually found within a local centre.

14.35 This quantitative deficiency in the district centre retail offer is shown by analysis of the household telephone survey results for main and top-up food shopping within the WA15 6 and WA15 7 postcodes, which reflect the natural catchment for a district centre such as Timperley.

**Table 32 – Timperley Catchment Survey Results**

<table>
<thead>
<tr>
<th></th>
<th>Main Food Market Share (%)</th>
<th>Top-Up Market Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>WA15 6</td>
<td>WA15 7</td>
</tr>
<tr>
<td><strong>Local Shops</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Co-Op (Stockport Road)</strong></td>
<td>4.2%</td>
<td>2.1%</td>
</tr>
<tr>
<td><strong>Iceland (Stockport Road)</strong></td>
<td>1.4%</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Sainsbury’s (Altrincham TC)</strong></td>
<td>18.1%</td>
<td>12.5%</td>
</tr>
</tbody>
</table>
### The Potential for Future Change in Timperley

#### 14.36 The review supports the view that Timperley predominately performs a secondary top-up role complementing higher order foodstores in Altrincham and the large out-of-centre Tesco Extra store at Baguley. Whilst it is inevitable that there will be some expenditure leakage to higher order centres, it is clear that for Timperley to reinforce its role as a district centre then the provision of a new high order foodstore of an appropriate scale would be required.

#### Plan 3 – Timperley Development Site

#### 14.37 In assessing the potential for a new foodstore within the district centre, given that the district centre boundary is tightly drawn in a linear configuration around the main retail frontages and that there is limited scope to extend the district centre boundary given the predominately residential areas which surround it, we consider that the only potential development site is the existing Co-Op store on Stockport Road (242 - 244) and the Thorley Lane car park to the rear.

#### 14.38 The site extends to 0.311 hectares and benefits from a prominent frontage on to Stockport Road. It is wholly and is located within the existing adopted UDP district centre boundary for Timperley. Provided issues related to access, servicing and car parking provision can be adequately addressed, we consider that there is significant potential to redevelop the existing store to provide new retail unit with a larger floorplate. In addition, given that there is already another Co-Op store within the district centre, the attraction of a different higher order retailer to the centre would assist in securing a qualitative uplift in the district centre convenience retail offer.
14.39 In addition to qualitative improvements that could potentially be derived from the redevelopment of the existing Co-Op site on Stockport Road, it will be important for the Council to continually monitor the level of vacancies within the district centre as well as maintaining its investment in the physical environment so as to maintain the relatively attractive district centre environment. It is also recommended that the Council actively manage the number of takeaway (class A5) uses within the district centre given the potential for these to detract from the viability of the centre and also create amenity issues for surrounding residential areas.
15. AREA SPECIFIC ASSESSMENT – LOCAL CENTRES

15.1 A separate element of the Study Brief is a requirement to review the existing local centre of Partington, which is identified as a priority regeneration area for the borough and Broadheath, where a new local centre is allocated for within the adopted UDP policy S10. Both are considered below.

Partington

15.2 Partington is presently identified in the adopted Trafford UDP as a local centre within the borough retail hierarchy. PPS6 (Annex A) provides a definition of a local centre, as follows:

‘A range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre’

15.3 In assessing future potential for change of Partington, the main issue for this study to consider is as to what scale of retail development would be required to deliver the wider regeneration goals for the locality and ensure that the centre viably meets local residents’ needs.

Physical Configuration / Retail Composition

15.4 Partington was originally a rural village that grew rapidly in the immediate post war period as an overspill settlement for the Manchester Corporation. It is a relatively detached settlement on the western side of the borough and lies near to the Manchester Ship Canal, which forms the borough boundary between Trafford and Warrington. Partington is one of the most deprived areas within Trafford and has been identified by the Borough Council as a priority area for improvement and regeneration through the preparation of an Area Action Plan (AAP).

15.5 The existing local centre at Partington was purpose built in the 1960’s and is anchored by a small Co-Op convenience store (c. 500 m² gross) in addition to several local shops
comprising a grocer, newsagent, general hardware store, a bakery and two takeaways. Non-retail service provision comprises a bank and estate agent / solicitors.

15.6 The existing local centre is very poorly configured with the small Co-Op store located towards the rear of the local centre and the remaining parade of units turning away from the local centre’s primary frontage on to Manchester Road. The existing pedestrian access to remaining shops is via relatively concealed footpaths offering very little visual surveillance, whilst the car parking and public spaces are degraded with little quality public realm or landscaping.

15.7 The present physical environment and significant number of vacancies within the local centre are in part attributable to continued uncertainty over future plans for Partington. Whilst planning permission (LPA ref: H/56035) was previously granted for the comprehensive redevelopment of the existing local centre, it is understood that the development was not progressed given commercial viability issues and the subsequent acquisition of the local centre by an alternative developer.

15.8 However, notwithstanding the uncertainty over future plans for the existing local centre, there has been significant public investment in recent years to provide a modern healthcare facility, as well as a new children’s nursery within Partington local centre. This is in addition to a relatively modern library, which is located opposite the shopping parade on Central Road. These are all elements which PPS6 identifies as key components within district centres.

Existing Performance

15.9 On the basis of the above, it is unsurprising that the household telephone survey results for the Partington catchment (postcode sector M31 4) highlight that local residents are travelling significant distances to larger centres to meet their local shopping needs.
Table 33 – Partington Catchment Survey Results

<table>
<thead>
<tr>
<th>Partington</th>
<th>Main Food Market Share (%)</th>
<th>Top-Up Market Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asda (Trafford Park)</td>
<td>14.1%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Sainsbury’s (Sale TC)</td>
<td>7.1%</td>
<td>2.7%</td>
</tr>
<tr>
<td>Co-op (Partington LC)</td>
<td>5.1%</td>
<td>32.9%</td>
</tr>
<tr>
<td>Tesco Extra (Altrincham TC)</td>
<td>11.1%</td>
<td>5.5%</td>
</tr>
<tr>
<td>Tesco Extra (Irlam)</td>
<td>37.4%</td>
<td>20.5%</td>
</tr>
<tr>
<td>Tesco Metro (Stretford TC)</td>
<td>7.1%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Tesco (Sale TC)</td>
<td>7.1%</td>
<td>4.1%</td>
</tr>
</tbody>
</table>

Source: NEMS Household Telephone Survey (Postcode Sector Results). Survey results do not add up to 100% due to survey weighting given the variances in sample sizes across the defined catchment zones.

15.10 As these household survey results highlight, whilst the majority of main food expenditure is retained within higher order stores / centres in Trafford, the large Tesco Extra store in Irlam (Salford), presently draws a significant proportion of expenditure outside of the borough. Whilst we anticipate that the development of the new Sainsbury’s foodstore in Urmston will assist in significantly ‘clawing’ back expenditure leakage presently flowing outside of the borough, it is clear that existing provision within Partington is not meeting the day-to-day needs of its local catchment and that there is an overriding need to secure new foodstore provision.

The Potential for Future Change in Partington

15.11 In assessing the potential future for change in Partington, it is clear given the existing deficiencies in the retail offer that the Council should proactively plan for new retail development and the creation of a new commercially viable centre as part of the wider Area Action Plan (AAP) process. The main support for this relies on the following key points:

- Partington is identified by the Indices of Multiple Deprivation (IMD) as one of the most deprived wards in Trafford and new retail development is explicitly supported by PPS6 (paragraphs 2.53 – 2.58) in order to ensure appropriate access for local residents to local shops and services within deprived areas;
• The household telephone survey results indicate that the existing retail provision is not meeting local shopping needs highlighted by significant expenditure leakage from the immediate Partington catchment (postcode sector M31 4) to other higher order centres and stores both within and outside of Trafford, precipitating unsustainable travel patterns; and

• The health-check assessment and on-site surveys clearly indicate significant quantitative and qualitative deficiencies in the existing local centre provision given the poor physical environment and layout configuration at present.

15.12 Given the clear PPS6 emphasis of providing appropriate access to local shops / services for residents in deprived areas, the main consideration for this study in assessing the future potential change in Partington is what scale of development could the Partington catchment realistically sustain and support in expenditure terms. This in turn prompts a secondary consideration, namely whether there is a need to review its present local centre status within the borough hierarchy.

15.13 We consider each point in turn below prior to setting out our conclusions and recommendations. Given the predominantly secondary role of the centre in the borough retail hierarchy, our main focus for assessing potential change in Partington is securing a new foodstore, which is in the form of development which traditionally underpins the vitality and viability of smaller centres.

1. What scale of retail development could the Partington catchment realistically support?

15.14 We have sought to establish the expenditure capacity from within the M31 4 postcode sector, which we consider to be a realistic catchment for any new foodstore provision within Partington, in order to consider the scale / quantum of retail development that could be supported.

15.15 In the first instance, given that any new foodstore is unlikely to be of scale or range to enable it to fully compete with larger stores such Tesco Extra in Altrincham / Irlam, we have assumed that a new foodstore in Partington could reasonably command a 65% market share from its tightly defined catchment (M31 4 postcode sector) for main food shopping and 75% for top-up food shopping, as set out below:
Table 34 – Convenience Expenditure Capacity within Partington Catchment

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>7,637</td>
<td>7,826</td>
<td>7,989</td>
<td>8,129</td>
</tr>
<tr>
<td>Convenience Expenditure per capita (less Special Forms Trading)</td>
<td>1,601</td>
<td>1,608</td>
<td>1,633</td>
<td>1,666</td>
</tr>
<tr>
<td>Available Expenditure</td>
<td>12,226,837</td>
<td>12,584,208</td>
<td>13,046,037</td>
<td>13,542,914</td>
</tr>
<tr>
<td>Main Food Expenditure (75%)</td>
<td>9,170,128</td>
<td>9,438,156</td>
<td>9,784,528</td>
<td>10,157,186</td>
</tr>
<tr>
<td>Top-Up Food Expenditure (25%)</td>
<td>3,056,709</td>
<td>3,146,052</td>
<td>3,261,509</td>
<td>3,385,729</td>
</tr>
<tr>
<td>Main Food Market Share</td>
<td>5.1%</td>
<td>65.0%</td>
<td>65.0%</td>
<td>65.0%</td>
</tr>
<tr>
<td>Top-Up Food Market Share</td>
<td>32.9%</td>
<td>75.0%</td>
<td>75.0%</td>
<td>75.0%</td>
</tr>
<tr>
<td>Available Expenditure to support new floorspace based on market share increase</td>
<td>1,473,334</td>
<td>8,494,340</td>
<td>8,806,075</td>
<td>9,141,467</td>
</tr>
<tr>
<td>NET Convenience Floorspace Capacity based on £10,000 Average Sales Density for Higher Order Retailer</td>
<td>147</td>
<td>849</td>
<td>881</td>
<td>914</td>
</tr>
<tr>
<td>GROSS Convenience Floorspace Capacity based on £10,000 Average Sales Density for Higher Order Retailer</td>
<td>210</td>
<td>1,213</td>
<td>1,258</td>
<td>1,306</td>
</tr>
</tbody>
</table>

15.16 As the table shows, the modelled increase in market share from within the tightly defined catchment generates a reasonable quantum of expenditure capacity to support new convenience provision within Partington. The floorspace figure is derived utilising a turnover figure which reflects the convenience offer envisaged in Partington, namely a medium sized foodstore which will offer a full food range but with limited non-food elements.

15.17 Whilst it will be for individual planning applications to justify an appropriate catchment and identify suitable expenditure capacity to support foodstore proposals, we consider that the quantitative capacity figures confirmed in our initial analysis are a baseline position and that additional floorspace can be supported by:
• The expenditure released (c. £1.5 million) through the closure of the existing Co-Op store within Partington Local Centre;

• Expenditure arising within the large workforce population located nearby in Carrington (e.g. top-up shopping at lunchtime);

• Drive-by sales given the prominent location of the local centre on Manchester Road, which is one of the main routes from the M60 / A6144 (M) between Manchester and North Cheshire; and

• Inflows from residents of Lymm Village, who are presently travelling significant distances to foodstores within Altrincham and Warrington.

15.18 With respect to this latter point, we consider that a new medium sized foodstore of an appropriate scale to the local centre, could potentially attract minor flows of expenditure from the Lymm catchment on the basis that:

• Existing convenience retail provision within Lymm village is itself presently limited to a small top-up orientated Somerfield store, complemented by small, high quality independent convenience shops (e.g. butchers / grocers);

• Future retail development within Lymm village is significantly constrained by the lack of any realistic development site to meet main food shopping needs, given the local topography, tightly defined conservation area boundary and that the village centre is immediately surrounded by residential dwellings;

• Whilst Lymm is within Warrington borough, it is almost equidistant between both Partington and Stockton Heath, which is the nearest main centre in South Warrington; and

• Partington is easily accessed from Lymm via Warburton Road whilst access to Stockton Heath is potentially constrained by existing highway capacity constraints around the London Road junction and the Manchester Ship Canal bridge area.

15.19 Drawing on the potential expenditure sources identified above we consider that the Council should be proactively planning through the Area Action Plan (AAP) process for a medium sized foodstore of up to 2,750 m² (gross). The rationale underpinning this conclusion relies on the following key points.

• Partington is defined by the Indices of Multiple Deprivation (IMD) as one of the most deprived wards in Trafford. PPS6 explicitly supports the provision of new retail facilities and investment in deprived areas so as to enable local residents and the socially excluded to access appropriate shops and services;
• The provision of a new foodstore comparable in scale to the existing Co-Op store would in our view not materially benefit or sustain Partington as a centre and would reinforce the significant outflow of expenditure to higher order centres

• The provision of a new foodstore in Partington would derive significant sustainability benefits by significantly reducing the need of local residents to travel significant distances to meet their food shopping needs; and

• The proposed scale of the foodstore would sustain and ensure significant quantitative and particularly qualitative benefits to Partington, creating a ‘critical mass’ to attract other local retailers and non-service facilities to the centre.

15.20 In assessing where the identified need could be met within Partington, given the identified deficiencies, we consider that the general extent of the existing local centre, as defined on the plan below, could be redeveloped to provide a modern layout which is attractive to local residents and prospective retailers alike.

**Plan 4 – Partington Development Site**

15.21 The site, which extends to c. 1.9 hectares, is understood to be in a single ownership and could potentially be brought forward without land assembly constraints. Whilst it will be important to secure a more prominent retail frontage along Manchester Road, it will also be important for the redevelopment of the local centre to be dealt with in a holistic manner with environmental and physical improvement works required in order to address the boundaries shared with surrounding residential dwellings.

2. **Should Partington be elevated to District Centre status in the local retail hierarchy?**

15.22 A secondary issue is as to whether the proposed development of a new foodstore of the scale indicated would materially impact on the hierarchy of existing centres and in
particular as to whether Partington would be elevated to the role of a district centre within the borough retail hierarchy.

15.23 The natural starting point for assessing the potential for future change in the status of Partington as a centre is to compare the existing retail and non-retail provision with Sale Moor district centre, which as identified in the area-specific assessment, is the smallest district centre in the existing retail hierarchy. The table below undertakes the exercise:

**Table 35 – Floorspace Breakdown**

<table>
<thead>
<tr>
<th></th>
<th>Convenience</th>
<th>Comparison</th>
<th>Service</th>
<th>Vacant</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sale Moor</td>
<td>831 m²</td>
<td>1,081 m²</td>
<td>3,469 m²</td>
<td>30 m²</td>
<td>5,551 m² (gross)</td>
</tr>
<tr>
<td>Partington</td>
<td>851 m²</td>
<td>60 m²</td>
<td>480 m²</td>
<td>960 m²</td>
<td>2,351 m² (gross)</td>
</tr>
</tbody>
</table>

15.24 The analysis clearly shows that whilst the existing convenience provision in Partington is comparable in scale at present to that in Sale Moor, that the quantum of non-retail service floorspace, which PPS6 specifically cites as a main difference between a local and district centre, distinguishes the two centres.

15.25 We acknowledge that the redevelopment of Partington local centre will potentially create a larger quantum of convenience floorspace than in Sale Moor, as well as accommodating a library and a wider breadth of public facilities than can presently be found in Sale Moor district centre. However, given Partington’s relatively peripheral location in relation to the wider borough, we consider that it is highly unlikely that its catchment could, in quantitative terms, sustain the wider range of non-retail uses.

15.26 Similarly in physical capacity terms, even if the existing local centre retail units were fully occupied, the centre would be significantly smaller than any of the other existing district centres within the borough.

15.27 We therefore conclude, on the basis of the above, that there is not sufficient merit to elevate Partington to the status of a district centre. It is our view that that the failure to elevate the centre in the borough retail hierarchy would not prejudice or constrain the future redevelopment of the centre.

15.28 With respect to the existing network of centres, we consider that the development of new retail facilities in Partington would not materially impact on any existing centre given that it
is relatively detached from the wider network of retail centres both within and immediately outside the borough.

15.29 Consequently, we re-affirm our recommendation that the Council should seek to support, through the Area Action Plan (AAP) process, the redevelopment of the existing local centre to provide a viable foodstore offer within Partington of an appropriate scale. It will be important however, to ensure that future redevelopment of the centre includes the provision of retail units for existing, local independent retailers as well as non-retail uses (e.g. bank, launderette etc.) and does not solely deliver a main foodstore without the wider local centre offer.

**Area Specific Assessment – Broadheath**

15.30 The development of a local centre to serve the Broadheath area has been promoted for a considerable period of time since its initial allocation within the Broadheath and Sinderland Local Plan. This initial local centre allocation was subsequently been maintained through the previously adopted Trafford UDP (May 1996) and now the adopted replacement UDP (June 2006) under policy S10.

15.31 This policy seeks to promote the development of a new local shopping centre at Sinderland Road in Broadheath to meet the needs of residents and workers within a major housing and employment growth area. The written justification to the policy further confirms that the Council envisages that a local centre development at Sinderland Road could consist of up to c. 1,490 m$^2$ (gross) of retail floorspace, in addition to a public house, community facilities and public open space. The fact that the UDP allocation specifies a gross floorspace is particularly important given that a later outline planning permission (H/OUT/55673 – approved September 2005) permits the development of a local centre comprising c. 1,486 m$^2$ net retail floorspace.

15.32 However, notwithstanding the ambiguity in the quantum of floorspace, given that the residential element of the Sinderland Road allocation scheme is presently being brought forward in a phased manner, one of the Study Brief requirements has been to undertake an updated assessment of convenience retail needs and consider future options to meet any gaps in provision. This is in light of strong commercial interest from a high order retailer for a c. 3,000 m$^2$ (gross) foodstore to anchor the local centre at Sinderland Road. We briefly consider retail planning issues relating to such provision coming forward later in the section.
15.33 In order to understand and assess the quantitative and qualitative need for new convenience provision in the Broadheath area, we consider the main issues to be:

1. The definition of an appropriate catchment within the Broadheath area and assessment of the expenditure available to support a new local centre / convenience provision; and

2. The potential location of a new local centre / convenience provision within the Broadheath area.

1. Catchment and Quantitative Need

15.34 We have drawn an appropriate catchment from the centre of the wider Sinderland Road allocation which will generate the population and expenditure capacity available to support convenience provision within the Broadheath area.

15.35 The defined catchment takes into account existing convenience provision within the Broadheath area (e.g. Aldi at Altrincham Retail Park) and reflects physical barriers such as the Bridgewater Canal, Manchester Road (A56) and Sinderland Brook, which would potentially restrict the realistic walk-in catchment any local centre at Sinderland Road could draw upon.

15.36 As the catchment plan provided at Appendix 11 clearly shows, the defined catchment area does not presently accommodate any existing local or neighbourhood centres within a c. 800 metre radius of the Sinderland Road site. Such a distance is clearly beyond the 300 metre ‘easy walking distance’ defined by PPS6 as being an appropriate walk-in catchment for local retail provision.

15.37 Whilst a small-scale Londis convenience store is located towards the Manchester Road (A56) end of Sinderland Road, we consider that there is a clear ‘gap’ and deficiency in convenience provision around the Sinderland Road / Broadheath area. It cannot be expected that this small-scale convenience store can adequately meet the shopping needs of a local population of c. 7,000.

15.38 Therefore, we consider that there is a quantitative and qualitative need for new local centre (convenience) provision in the Broadheath area in order to meet local shopping needs and ensure an appropriate distribution of and accessibility for local residents to basic shopping facilities.
15.39 A second stage is to identify the quantum of convenience expenditure arising locally. We have utilised the *Experian e-Marketer Retail Planner* database and generated a bespoke catchment, on the basis of super output geographical areas, which broadly fits with the local centre catchment we have identified. Our assessment of locally arising expenditure capacity to support new convenience provision is set out below.

**Table 36 – Broadheath Catchment Assessment**

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>6,378</td>
<td>7,213</td>
<td>7,858</td>
<td>8,131</td>
</tr>
<tr>
<td>Expenditure per capita (less SfTs)</td>
<td>£1,494</td>
<td>£1,505</td>
<td>£1,529</td>
<td>£1,560</td>
</tr>
<tr>
<td>Residual Capacity (£)</td>
<td>£9.5m</td>
<td>£10.8m</td>
<td>£12m</td>
<td>£12.7m</td>
</tr>
<tr>
<td>Main Food Expenditure Proportion (75%)</td>
<td>£7.12m</td>
<td>£8.1m</td>
<td>£9m</td>
<td>£9.52m</td>
</tr>
<tr>
<td>Top-Up Food Expenditure Proportion (25%)</td>
<td>£2.37m</td>
<td>£2.7m</td>
<td>£3m</td>
<td>£3.17m</td>
</tr>
<tr>
<td>Main Food Market Share (2.5%)</td>
<td>£0.18m</td>
<td>£0.2m</td>
<td>£0.23m</td>
<td>£0.3m</td>
</tr>
<tr>
<td>Top-Up Market Share (60%)</td>
<td>£1.42m</td>
<td>£1.62m</td>
<td>£1.80m</td>
<td>£1.90m</td>
</tr>
<tr>
<td>Residual Capacity to support new convenience retail floorspace in Broadheath</td>
<td>£1.6m</td>
<td>£1.82m</td>
<td>£2.03m</td>
<td>£2.2m</td>
</tr>
<tr>
<td>NET Floorspace Capacity at £2,000 per m² Average Sales Density</td>
<td>800 m²</td>
<td>910 m²</td>
<td>1,015 m²</td>
<td>1,100 m²</td>
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15.40 In considering the nature and quantum of convenience provision that would be likely to come forward as part of a new local centre at Broadheath, we have assumed given the proximity and easy access to main foodstore provision in Altrincham and Sale, that the provision coming forward at Broadheath would be of a small-scale and orientated towards top-up shopping. This is reflected in our capacity assumptions in terms of market share; 2.5% of main-food shopping share and 60% of top-up convenience and also average sales turnover of £2,000, which is reflective of smaller-scale local provision.

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5 Additional Population based on phasing for housing development set out in policy HOU4 of the adopted UDP (120 dwellings constructed April 2002 – March 2006; 300 dwellings April 2006 – March 2011; and 225 dwellings April 2011 – March 2016). However, additional capacity up to 10% (e.g. 64 more dwellings) permitted through recent planning permission. Average number of persons per household (2.39) applied to number of dwellings being brought forward.
15.41 On the basis of these assumptions and given the tightly defined catchment, we consider that there is sufficient merit in the Council maintaining the existing UDP allocation for a new local centre of c. 1,500 m$^2$ (gross) through its LDF to serve present and future local resident shopping needs given that:

- The identified quantitative capacity identified is given on the basis of convenience floorspace alone and does not include any non-retail service uses traditionally associated with a local centre offer;
- No allowance has been made for drive-by trade or inflows from just beyond the defined catchment; and
- A new local centre at Sinderland Road would ‘fill’ the gap in localised provision in the Broadheath area and would not materially impact on existing local provision given that the expenditure capacity to support a new local centre would be primarily drawn from expenditure that is presently flowing outside the immediate Broadheath locality.

15.42 The Brief also requests that consideration is given to the most appropriate location within the Broadheath area to meet any identified need for new provision.

2. Location of New Convenience Provision within Broadheath

15.43 The Development brief and Masterplan prepared for Sinderland Development Area identified the location for a close to the junction of Sinderland Road and Barlow Road, near to Broadheath Primary School. This was consider to meet the existing deficiency in convenience provision within Broadheath as:

- A new local centre at this location would be able to service top-up shopping needs for local residents on linked school trips;
- Any new local centre on the Manchester Road (A56) frontage would be located close to existing local centre provision at the junction of Manchester Road and Park Road;
- The identified development site is vacant and would not require the relocation of existing uses (e.g. South Trafford College from A56 / new Sinderland Road link) to new sites;
- A new local centre at this location would be within an easy walking distance (defined as c. 300 – 500 metres by PPS6) between the new housing development at Sinderland Road and the existing residential area to the south of Sinderland Road, focussed along Barlow Road; and
• A new local centre could also potentially draw on small-scale drive-by trade from passing motorists travelling to and from Partington.

15.44 We agree with this rationale and advise that the present local centre UDP allocation should be maintained through the LDF process and that the exact location of the new local centre is articulated through the emerging Land Use Allocations DPD as well as any future update to the Proposals Map.

3. The Scope for Higher Order Provision within Broadheath

15.45 Given that there is ongoing commercial interest from a higher order convenience operator to develop a c. 3,000 m² (gross) foodstore to anchor the Sinderland Road local centre, we have been asked by the Council to briefly consider, on the basis of our initial quantitative assessment, as to its appropriateness in meeting local needs within the Broadheath area.

15.46 In the first instance, in assessing the appropriateness of higher order foodstore of the scale proposed (c. 1,700 m² net sales floorspace), our initial concerns would be that a quality foodstore of this scale is likely to:

• Turnover at around c. £19 million⁶, which is significantly more than could be sustained from the catchment identified as being appropriate for a local centre in this location. The foodstore is likely to serve a significantly larger catchment zone; and

• Draw expenditure away from existing town centre foodstores in Altrincham and Sale in particular and become a main food retail destination which does not afford the opportunity for linked shopping trips. This raises significant sustainability issues as the foodstore would draw shoppers from a wider catchment (potentially by car) and it is unrealistic to suggest that a new foodstore would solely serve a walk-in catchment appropriate to a local centre.

15.47 Notwithstanding these concerns, whilst we consider that the net floorspace (c. 1,486 m²) permitted under outline planning permission (H/OUT/55673) was for the development of a mixed local centre retail offer (e.g. convenience and comparison) and not solely to be utilised by a single foodstore, given that the outline planning permission remains extant and capable of implementation, we consider that the net floorspace increase (c. 200 m² net) generated by the higher-order foodstore proposal (c. 1,700 m² net) can be adequately justified in quantitative capacity terms.

⁶ Turnover based on net floorspace of c. 1,700 m² net and an average sales / turnover density of c. £11,000 per m² net to reflect potential higher order operator.
15.48 In conclusion therefore, given the identified need for new convenience provision to meet local needs, allied to the limited commercial interest in bringing forward the local centre, which was originally allocated as part of the Broadheath and Sinderland Local Plan, we would recommend that the Council seeks to actively work with the prospective applicants to ensure that new local centre provision is brought forward to address the identified deficiency in convenience retail offer within Broadheath. However, it must be ensured that:

- Any new foodstore provision is of an appropriate scale to the status of Broadheath as a local centre, given the existing PPS6 and adopted UDP policy tests;
- The net sales area and floorspace composition (convenience / comparison) of any new foodstore is tightly controlled by way of planning condition in order to ensure that the foodstore does not significantly exceed the existing quantum of net retail floorspace allowed by the extant outline planning permission; and
- The provision of a new foodstore must be allied to the provision of additional local centre unit accommodation in order to avoid the provision of a standalone foodstore and provide access for local residents to other retail and non-retail uses traditionally associated with local centre provision such as a Bank or Hairdressers for example.

15.49 In addition to addressing the main retail issues identified above, given that a new higher order foodstore will draw from a significantly larger catchment area than the walk-in catchment a local centre would ordinarily command, issues relating to accessibility / sustainability should also be adequately addressed.
16. CONCLUSIONS AND RECOMMENDATIONS

16.1 The overall purpose of this study is to review the scope of retail and leisure provision and critically appraise the scope for additional provision within the borough in the period to 2021. This will enable the Council to proactively plan for future needs through its Local Development Framework (LDF) and to exercise its development control function. We set out below our principal findings and recommendations in relation to quantitative and qualitative need for convenience, comparison and leisure matters before concluding on matters of hierarchy and development control.

Convenience

Altrincham (Southern) Zone

16.2 On the basis of our quantitative assessment, given the strong market share performance of the existing convenience retail offer within Altrincham town centre, we conclude at a wider strategic level, that there is no overriding quantitative need to formally allocate any sites for additional convenience goods floorspace in Altrincham town centre.

16.3 However, notwithstanding the lack of overriding need for new convenience provision in Altrincham, within the wider southern zone, our area specific assessments have revealed that the existing foodstore provision within Hale and Timperley district centres are not meeting local needs and are not of a scale that would be expected within district centre.

16.4 Therefore, we believe that there is an overriding qualitative need to enhance the foodstore provision within both district centres. To this extent, we have identified potential development site opportunities within each centre, which we consider could accommodate a small-scale quality foodstore to enhance the vitality and viability of the district centres as local retail destinations.

16.5 With respect to Hale Barns local centre, notwithstanding the outcome of the ongoing foodstore appeal, it is evident that there is scope for a qualitative improvement in the existing convenience offer within the centre in order to meet locally arising need.

16.6 In relation to the proposed local centre at Broadheath, which has been allocated for a considerable period of time in the adopted UDP, our area-specific assessment confirms
that there is a quantitative and qualitative need for new convenience provision within the locality.

16.7 Overall, with respect to convenience provision within the southern catchment zone, we recommend that the Council encourages proposals for new foodstore provision within the existing (and proposed) district and local centres.

**Sale (Eastern) Zone**

16.8 Given the qualitative breadth to its convenience offer, reflected in the strong market share performance and expenditure retention levels, we conclude that there is no overriding requirement or need for any additional convenience provision within Sale town centre. Whilst planning permission remains extant for the development of a new Aldi foodstore within the town centre, we consider that additional convenience provision is not a priority for Sale town centre. We consider that there is no overriding need for quantitative expansion of the town centre and that the policy focus through the LDF should be on delivering a greater qualitative uplift to the town centre retail offer.

16.9 With respect to Sale Moor district centre, given the present quantitative and qualitative deficiencies in the existing convenience offer, we recommend that the Council encourages proposals through its forthcoming LDF for new foodstore provision. Whilst it is unlikely that a major foodstore could be accommodated within the existing district centre due to surrounding physical constraints, we have identified a development site opportunity which could potentially accommodate a small to medium sized foodstore on a commercially attractive frontage. This site was subject to a now-lapsed planning permission and the Council should fully re-investigate opportunities for new development to come forward.

**Stretford (Northern) Zone**

16.10 Our review finds that the existing foodstore provision within the catchment is underperforming, retaining only c. 32% of main food expenditure and 50% of top-up expenditure. On this basis, we consider that the Stretford (northern) zone requires the most urgent Council intervention through the LDF process in order to address the identified quantitative and qualitative deficiencies.

16.11 To this extent, whilst the need for new higher order convenience provision in the northern zone has already been recognised through the grant of planning permission for a new medium sized Tesco foodstore at Stretford Leisure Centre, a balanced policy response will be required given that:
• The existing store within Stretford Mall is a first generation mall-style foodstore with a limited product range and a lack of a prominent commercial frontage. The store is deficient in comparison to competing higher order, full range stores; and

• A new Tesco store at Stretford Leisure Centre, which would be located only c. 1 mile to the north of Stretford Mall will have a modern layout, a wider product range and provide a better shopping experience.

16.12 In terms of emerging proposals for a larger Tesco store at Stretford Leisure Centre, whilst the quantitative need for a larger store (c. 8,200 m$^2$ gross) was accepted by all the main parties at public inquiry, we recommend in the first instance that the Council recognise the extant planning permission for a new foodstore (c. 4,500 m$^2$ gross) through its Land Allocations DPD and any subsequent update to the adopted Proposals Map.

16.13 With respect to seeking to support a new larger foodstore than presently permitted, whilst forward policy support should recognise the quantitative and qualitative benefits arising from the provision of a larger Tesco store as part of a comprehensive sports-led regeneration of the wider Old Trafford area (e.g. through the Core Strategy given its potential strategic importance), any policy support must be firmly grounded on the basis of satisfactory resolution of the wider PPS6 policy issues (i.e. retail impact, sequential compliance, disaggregation etc).

16.14 Allied to this policy position on the Stretford Leisure Centre site, given the town centre first approach advocated by PPS6, the Council should encourage qualitative improvements in the convenience offer in Stretford town centre through its LDF. To this extent, we recommend that the Council should engage with the Mall owners in order to investigate the potential for redevelopment of the Mall to include new higher order foodstore provision.

16.15 With respect to the wider northern zone, we do not consider that there is overriding need to proactively plan for change in any of the local centres (e.g. Trafford Bar), although we would recommend that the potential impact of the Tesco at Stretford Leisure Centre on existing local centre provision within the Old Trafford locality (e.g. Aldi, Iceland) is fully assessed.

Urmston (Western) Zone

16.16 It is anticipated that the provision of a new medium-sized Sainsbury's store within Urmston town centre, which is scheduled to open in 2009, will substantially address the quantitative and qualitative deficiencies in the existing convenience offer and enable the
town centre to claw-back expenditure presently being drawn to the large out-of-centre Asda store at Trafford Park and the Tesco Extra in Irlam (Salford).

16.17 Therefore, we do not consider there to be any scope for any convenience goods allocations through the LDF within the short to medium term. However, we would recommend an update to this study (c. 2011 – 2012) once the town centre redevelopment is complete and trading patterns from the new foodstore provision has settled down. This will enable the Council to understand the impact of the new in-centre Sainsbury’s store and enable it to proactively plan for development within the later periods of the LDF, should a further quantitative or qualitative need be identified.

16.18 With respect to Partington, it is clear that the existing local centre is failing to meet local shopping needs and the quantitative and particularly qualitative deficiency in its foodstore provision is presently precipitating unsustainable main food shopping patterns. Consequently, given that Partington is defined as one of the most deprived wards in Trafford and that PPS6 is explicit in its support for new retail facilities and investment in deprived areas so as to ensure appropriate access for local residents, we strongly recommend that the Council proactively plans through the Area Action Plan (AAP) process for the provision of a new medium sized foodstore within the range of c. 2,500 to 2,750 m² (gross) to address existing deficiencies.

16.19 As part of the AAP process, the Council ensure that the provision of a new foodstore is tied to the wider redevelopment of the existing local centre and that provision is made to accommodate local independent retailers as well as non-retail services. A mixed retail offer, anchored by a competitive foodstore, will ensure the longer-term viability of the centre.

**Non-Bulky Comparison**

**Altrincham (Southern) Zone**

16.20 Whilst our quantitative capacity assessment shows that Altrincham town centre is performing relatively well in light of strong competition from higher order centres such as Manchester and The Trafford Centre, we consider that there is potential to improve and consolidate non-bulky comparison goods provision within Altrincham town centre through the LDF process.

16.21 In the short-term, whilst the ongoing redevelopment of the Stamford Quarter will deliver a significant quantitative and qualitative benefit to the town centre through the provision of
new modern floorspace and the attraction of higher order retail anchors, we consider that there is a need to bring forward additional development proposals in order to further stimulate demand from higher order retailers. We consider that securing a further qualitative uplift in the town centre retail offer will be very important if Altrincham is to fulfil its role as sub-regional centre within the regional retail hierarchy, as supported by emerging RSS.

16.22 To this extent, we consider that the Altair scheme is the only major opportunity within Altrincham town centre to meet the identified future quantitative and qualitative need. We therefore recommend that the site, which is presently identified within the adopted UDP, is maintained as an allocation within the LDF and is further promoted to ensure that the quantitative and qualitative need identified through our capacity assessment is not taken up by sequentially inferior schemes which may not deliver the wider qualitative benefits.

16.23 However, given that the Altair site lies to the north of the railway line and is detached from the established retail areas, it will be important for the Council to ensure that the scheme is physically integrated with the primary shopping area of the town centre in order to prevent the development potentially functioning as a separate retail destination within the town centre.

16.24 With respect to the wider town centre, we conclude that there is no requirement to allocate any other additional sites through the LDF to meet for future non-bulky comparison needs. However, it will be particularly important for the Council to work with existing landowners, retailers and town centre stakeholders to bring about qualitative improvements to the existing town centre offer. Improvements to the existing retail units, shopping street and general townscape will be required as the Stamford Quarter and Altair developments are likely to shift the traditional emphasis and focus of retail provision within the town centre, potentially altering the existing retail circuit.

16.25 Therefore, the Council should seek, through the LDF process, to encourage investment and improvement to existing primary shopping areas, such as the eastern end of George Street (e.g. JJB development), to ensure a balanced retail provision within the town centre.

Sale (Eastern) Zone

16.26 We anticipate that Sale town centre will continue to perform a secondary role within the sub-regional retail hierarchy, with local residents looking towards the larger centres to meet their main non-bulky shopping needs.
Therefore, whilst there is some potential to increase Sale’s non-bulky market share and thus generate significant quantitative capacity to support new retail floorspace, the Council’s priority through the LDF process should be to secure qualitative improvements to the existing town centre offer.

This will be achieved in the short term through actively encouraging the active re-use of several vacant sites within the primary shopping area along School Road. In particular, the LDF should seek to actively promote the redevelopment of the presently vacant Aldi site for non-bulky comparison use if the existing planning permission is not implemented. We consider that this site, with its prominent frontage and site depth, could accommodate one or two medium sized quality non-bulky retail anchors within the town centre. The development of the site for non-food retail use would in our view deliver a significant qualitative benefit to the town centre in comparison to the limited benefit accrued through the provision of a new foodstore.

In addition to focussing on the Aldi site, the Council should actively promote the re-use of the vacant Kwik Save store for non-food retail uses as well as actively encouraging the amalgamation of smaller units within the town centre to provide the larger floorplates which would be attractive to national multiple retailers or good quality independent retailers who may wish to expand or assume a presence within the town centre.

On the basis, the emphasis of LDF policy for Sale town centre must therefore be of consolidation and improvement rather than significant growth.

Stretford (Northern) Zone

Given the relatively poor town centre performance (12.6% market share from the northern zone) allied to the fact that Stretford sits within a highly accessible catchment, close to higher order centres such as Manchester City Centre, it is clear that there is scope for significant improvement of the northern catchment non-bulky comparison retail offer in quantitative and qualitative terms. As per our conclusions in relation to future convenience provision within the northern catchment, it is clear that a dual approach is required in order to address existing deficiencies.

In the first instance, whilst the focus should be on exploring opportunities to secure a significant qualitative uplift in the existing comparison retail offer of the Mall Shopping Centre, given the overriding short-term need for new non-bulky comparison provision, we consider that the larger Tesco store proposals at Stretford Leisure Centre should be supported for the reasons previously set out in our conclusions. However, this forward
policy support should again be conditional on satisfactorily addressing PPS6 issues relating to impact, sequential compliance and disaggregation.

16.33 Allied to the support for new non-bulky provision at Stretford Leisure Centre, the Council should to actively support a qualitative uplift in the existing non-bulky comparison offer within Stretford Mall Shopping Centre. Whilst comprehensive redevelopment / reconfiguration of the existing centre will be dependent on the existing owners’ aspirations for the Mall in the longer-term, encouragement of physical improvements, including investment in physical and other townscape initiatives (e.g. exterior façade renovation), would significantly enhance the shopping experience for local shoppers and improve the attractiveness of the town centre to retailers in the short term.

**Urmston (Western) Zone**

16.34 As with our convenience assessment, we believe that the Ask redevelopment will significantly improve the quantum and quality of retail floorspace within the town centre and address existing deficiencies in its retail offer. We therefore consider that until trading patterns and expenditure flows are established, there is no practical scope or need to allocate sites through the LDF for non-bulky comparison floorspace in the short to medium term.

16.35 In the meantime, we recommend that LDF policies should be focussed on delivering qualitative benefits to the wider town centre, including detailed consideration of the redevelopment potential of the Victoria Parade shopping precinct, which is a key development opportunity on the southern side of the town centre.

16.36 With respect to the quantitative capacity identified through our assessment, we recommend that the Council seek to channel the capacity identified into town centre and seek to resist any additional out-of-centre non-bulky proposals until the town centre redevelopment scheme is operational. It is our view that further out-of-centre non-bulky development could impact upon the commercial success / letting strategy for the new town centre scheme.

16.37 If however proposals do come forward for non-bulky development outside of Urmston town centre, in addition to demonstrating compliance with the PPS6 policy tests, there will need to be a detailed and robust justification as to how any scheme will not impact on the Urmston town centre development.
**The Trafford Centre**

16.38 With respect to The Trafford Centre, whilst our assessment shows that the centre is trading strongly from the defined catchment zones, a wider regionally-based quantitative assessment would be required in order to fully understand the extent of its influence. Therefore, in light of emerging RSS guidance, which confirms that there is no present scope to identify the centre as a regional centre, we expect the Council to maintain its existing policy position through the LDF, in terms of continuing to treat the centre as an out-of-centre location and thus subject to the PPS6 tests.

**Bulky Comparison (Retail Warehousing)**

16.39 Our assessment has identified quantitative capacity on the basis of strong expenditure growth projections. However, given that the borough is extremely well provided for in terms of retail warehouse provision (i.e. Altrincham, Trafford and White City Retail Parks), we do not consider that the improvement or expansion of bulky goods retail provision is an immediate priority for the Council. This is particularly in light of the need for new non-bulky floorspace within the respective town centres and the lack of readily available in or edge of town centre development sites to meet this overriding need.

16.40 Whilst the Council should seek to support PPS6 compliant town centre proposals as they emerge, any additional bulky goods development that cannot be met within the respective town centres should continued to be focussed on the existing retail park destinations, subject to demonstrating compliance with the relevant PPS6 policy tests. To this extent, we consider that the existing UDP policy framework, which seeks to prevent the development of standalone retail warehouse units across the borough, should be maintained in order to enhance the potential for linked shopping trips.

16.41 In addition to the above, given that there has been a recent trend towards the change of use of existing bulky goods orientated retail warehouses to non-bulky uses by virtue of previously granted open A1 consents, whilst the Council cannot resist the change in the nature of retail operation in such instances, we recommend that the Council effectively condition all new developments to restrict the type of goods sold from retail warehouses and should seek to resist attempts to relax restrictive conditions. It will be important for the Council to attempt to retain as many retail warehouses in bulky goods use.
Leisure Uses

16.42 Whilst it is difficult to proactively plan for leisure development given that the leisure sector is dynamic and operator-led, on the basis of our assessment of existing and forward leisure provision within the Borough, we do not consider that there is a significant need for the Council to proactively plan for future leisure development during its forthcoming LDF.

16.43 In terms of cinema provision, with the completion of the town centre scheme in Altrincham to complement existing provision in the north of the Borough, we do not consider that there is a qualitative need for additional cinema provision in the short to medium term. With respect to other mainstream leisure uses, our assessment highlights that the Borough is well provided for in terms of large bingo halls, public/private health and fitness centres, and ten-pin bowling through the Namco station at The Trafford Centre.

16.44 Therefore, in terms of forward strategy, given that leisure development is predominantly operator-led, we recommend that should any new leisure proposals emerge which would quantitatively and qualitatively improve the existing provision within the Borough, then subject to wider PPS6-based planning considerations, the Council should support new leisure development.

16.45 However, given the qualitative breadth of existing mainstream leisure provision, one of the main priorities for the Council in the short-term will be to encourage a diversification in the evening economy within the respective centres, which are presently focussed towards traditional non family-orientated drinking establishments.

16.46 Whilst the Denmark Street and Waterside developments in Altrincham and Sale has already delivered a qualitative uplift in the evening economy offer through the provision of modern family orientated restaurants, the Council should continue to seek to encourage higher order family orientated restaurants within the main town centres in order to increase dwell times.

16.47 In particular, notwithstanding the thriving bar and restaurant scene in Hale, given the sub-regional status of Altrincham and the general affluent catchment to which it draws, we consider that the town centre should be seeking to attract the type of operators that have recently located to the Great Hall development in The Trafford Centre for example. To this extent, it will be important to satisfying outstanding requirements from operators such as Pizza Express for premises within the town centre (as well as Sale).
16.48 With respect to Urmston and Stretford town centres, whilst we anticipate that the Ask development in Urmston will also qualitatively improve the café / restaurant offer within the town, the evening economy provision in Stretford clearly needs significant improvement beyond the existing snooker hall and public house provision. The deficiency in leisure provision within Stretford town centre, which is presently constrained by the Mall operating hours, should be addressed by the Council, working in partnership with the existing Mall owners, as part of a wider consideration of the future role of Stretford town centre.

16.49 As ever with evening economy uses, the Council should seek to actively avoid the over-concentration of uses given the potential impacts on the amenity of local residents. The Council need to ensure that night-time uses do not become dead frontages during the daytime and undermine the vitality of primary and secondary shopping frontages.

16.50 There are specific management issues in relation to ensuring that the evening economy does not impact on the daytime economy and we anticipate that the Council will continue to take a strong leadership role through its Town Centre Management Team. The potential policy response in relation to the evening economy and the over-concentration of bar / restaurant uses in considered later in this section.

The Retail Hierarchy

16.51 Drawing on the conclusions set out above, we have considered the current appropriateness of the existing retail hierarchy, particularly in relation to the status of Altrincham and Partington.

16.52 Firstly, with respect to Altrincham, given that the adopted UDP does not actively distinguish between the four main town centres within the Borough at present, given the ongoing and planned development within the town centre, allied to the emerging Regional Spatial Strategy identification of the town as a sub-regional centre, we recommend that the Council actively considers the elevation of Altrincham to a sub-regional centre through the LDF.

16.53 We consider that an elevation in the town’s status to distinguish it from the other town centres within the borough retail hierarchy will enable the Council to proactively plan for investment and expansion at a scale appropriate to a sub-regional centre, as encouraged by emerging RSS policy. It will enable the Council to position and ‘benchmark’ Altrincham alongside other RSS defined sub-regional centres such as Macclesfield, Warrington and Stockport, all of which have emerging proposals for significant town centre redevelopment schemes.
16.54 Moving down the existing hierarchy, whilst our quantitative and qualitative assessment has identified significant variances in the existing performance of the three town centres within the Borough (Sale, Stretford and Urmston) and the challenges facing them, we consider that the role of the centres will not substantively change over the LDF period and that they will continue to play a major role in meeting local residents needs, particularly in relation to convenience shopping but also in relation to more localised comparison shopping needs.

16.55 With respect to the third tier of centres, our area-specific assessments for Hale, Sale Moor and Timperley clearly show that the respective district centres do not fulfil a role expected of a district centre (as articulated in PPS6) in terms of convenience provision. However, the respective centres do have a large non-retail service (e.g. banks) function as well as providing a range of public facilities (e.g. libraries) to local residents. Therefore, notwithstanding the requirement to quantitatively and qualitatively improve convenience provision, we do not consider that there is any merit in changing the status of the three district centres within the borough retail hierarchy.

16.56 Therefore, the main issue in considering the appropriateness of the existing borough retail hierarchy going forward through the LDF is the future status of Partington local centre, which whilst accommodating several public facilities (e.g. library) normally found within a PPS6 definition of a district centre, should not be elevated to a district centre as:

- The relatively detached nature of its catchment will prevent Partington sustaining the quantum and range of non-retail service uses (e.g. banks and building societies) expected by PPS6 to be found within district centres; and
- The centre in quantitative terms has significantly less retail units than in the existing district centres and the number of units is likely to be further reduced through any future redevelopment proposals due to commercial viability concerns and physical capacity constraints.

16.57 Whilst the redevelopment of Partington will potentially create a larger quantum of convenience floorspace than within any of the existing district centres within the borough at present, we do not consider that there is sufficient merit in elevating the centre to district centre. We also consider that the failure to elevate the centre would not prejudice or constrain the future development of the centre or the provision of a medium-sized foodstore. Therefore, we recommend the maintenance of the local centre allocation for Partington.
Development Control

Town Centre Boundaries

16.58 We recommend that the existing town centre boundaries, as presently defined within the adopted UDP, are appropriate for the purposes of future retail / town centre policy through the forthcoming LDF given that:

- There are available development sites within the town centre and thus no requirement for additional edge-of-centre / expansion sites to be allocated to meet identified quantitative need;
- There is no existing edge-of-centre retail provision which is capable of physical integration with the primary areas of existing town centres or merit inclusion within the existing town centre boundaries; and
- The main town centres are closely surrounded by residential dwellings and major arterial routes (e.g. Chester Road), thereby restricting future development or expansion opportunities.

16.59 As previously stated, the Council should be proactively planning for consolidation of the existing town centres through the comprehensive development of existing opportunity sites.

16.60 With respect to the district centre boundaries, whilst they should broadly remain as presently defined within the adopted UDP, we recommend that the Council updates the boundary for Hale to reflect the recent Tesco Express development and considers a minor extension to the boundary within Sale Moor to reflect the development opportunity site identified in our area specific assessment. The minor extension of the district centre boundary would bring the existing place of worship and the single dwelling at 26a Warrener Street (as previously identified in the now lapsed outline permission) into the defined district centre boundary. We do not recommend any changes to the existing district centre boundaries for Timperley.

Primary and Secondary Frontages

16.61 Whilst the main and secondary shopping frontages for the town and district centres within the borough are set out within Appendix H of the adopted UDP, the town centre inset plans contained within the adopted proposals map do not identify the primary or secondary shopping areas for each of the town centres. Therefore, we recommend that the Council
should identify the primary and secondary shopping areas for each of the respective town and district centres on any future proposals map for the avoidance of doubt and for ease of reference.

16.62 With respect to the existing policy, whilst adopted UDP policies S13 and S14 (non-shop uses within town, district and local centres) and development control policy D1 set out the tests against which any change of use applications for the conversion of Class A1 retail premises to non-retail uses will be assessed, we recommend that in light of the amendments to the use class order (disaggregation of A3 uses etc.) that the Council considers the preparation of a Shopping and Shop Front Supplementary Planning Document (SPD) to further expand on existing UDP frontage policies. An SPD could specifically address the following points:

- To ensure a balance is maintained between A1 and non-A1 uses in secondary shopping frontages. An over-concentration policy could be constructed whereby the total proportion of non-retail units along any secondary frontage, should not exceed a specified percentage (e.g. 50%) of the total shopping frontage, taking into account both existing and committed changes of use;

- To prevent not more than 3 adjoining shop units or a certain distance (e.g. 15 metres) of any continuous frontage being occupied by non-A1 uses; and

- To prevent proposals that isolates individual shop units and creates a deserted and inactive shopping frontage during the day.

16.63 The preparation of an SPD would enable the Council to appropriately deal with the perceived over-concentration of non-retail (class A3 – A5) uses within Hale district centre and formulate individual ‘trigger’ points for each centre so as to identify as to where the balance between retail and non-retail uses may impact on the vitality and viability of a centre as a retail destination.