



## **Economy Scrutiny Committee**

Date: Thursday, 5 March 2020

Time: 10.00 am

Venue: Council Antechamber, Level 2, Town Hall Extension

Everyone is welcome to attend this committee meeting.

**There will be a private meeting for Members only at 9.30am in Committee Room 6 (Room 2006), 2nd Floor of Town Hall Extension**

### **Access to the Council Antechamber**

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## **Membership of the Economy Scrutiny Committee**

**Councillors** - H Priest (Chair), Abdullatif, Green, Hacking, Johns, Noor, Raikes, Shilton Godwin, K Simcock and Stanton

## Agenda

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- 1. Urgent Business**  
To consider any items which the Chair has agreed to have submitted as urgent.
- 2. Appeals**  
To consider any appeals from the public against refusal to allow inspection of background documents and/or the inclusion of items in the confidential part of the agenda.
- 3. Interests**  
To allow Members an opportunity to [a] declare any personal, prejudicial or disclosable pecuniary interests they might have in any items which appear on this agenda; and [b] record any items from which they are precluded from voting as a result of Council Tax/Council rent arrears; [c] the existence and nature of party whipping arrangements in respect of any item to be considered at this meeting. Members with a personal interest should declare that at the start of the item under consideration. If Members also have a prejudicial or disclosable pecuniary interest they must withdraw from the meeting during the consideration of the item.
- 4. Minutes** 5 - 14  
To approve as a correct record the minutes of the meeting held on 6 February 2020.
- 5. District Centres** 15 - 68  
Report of the Strategic Director (Growth and Development) attached  
  
This report details the work undertaken by the District Centres Sub Group to enable its findings to be integrated into Local Plans. The report also outlines the on-going work by IPM and the Council on centres as part of their roles in the Area Based Collaborative Entrepreneurship in Cities (ABCitiEs) European Partnership.
- 6. High Speed North (High Speed 2 and Northern Powerhouse Rail) update** 69 - 84  
Report of the Strategic Director (Growth and Development) attached  
  
This report provides Economy Scrutiny Committee Members with an update on High Speed 2 (HS2) and Northern Powerhouse Rail (NPR) following the publication of the independent review of HS2 by Douglas Oakervee and the recent announcement on HS2 by the Prime Minister on 11 February 2020.

7. **Withington Village Draft Development Plan**  
Report to follow.
8. **Economy Dashboard Quarter 3 2019/20** 85 - 110  
The Economy Dashboard for Quarter 3 of 2019/20 attached.
9. **Overview Report** 111 - 124  
Report of the Governance and Scrutiny Support Unit

This report provides the Committee with details of key decisions that fall within the Committee's remit and an update on actions resulting from the Committee's recommendations. The report also includes the Committee's work programme, which the Committee is asked to amend as appropriate and agree.

## Information about the Committee

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Scrutiny Committees represent the interests of local people about important issues that affect them. They look at how the decisions, policies and services of the Council and other key public agencies impact on the city and its residents. Scrutiny Committees do not take decisions but can make recommendations to decision-makers about how they are delivering the Manchester Strategy, an agreed vision for a better Manchester that is shared by public agencies across the city.

The Economy Scrutiny Committee has responsibility for looking at how the city's economy is growing and how Manchester people are benefiting from the growth.

The Council wants to consult people as fully as possible before making decisions that affect them. Members of the public do not have a right to speak at meetings but may do so if invited by the Chair. If you have a special interest in an item on the agenda and want to speak, tell the Committee Officer, who will pass on your request to the Chair. Groups of people will usually be asked to nominate a spokesperson. The Council wants its meetings to be as open as possible but occasionally there will be some confidential business. Brief reasons for confidentiality will be shown on the agenda sheet.

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Smoking is not allowed in Council buildings.

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## Further Information

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For help, advice and information about this meeting please contact the Committee Officer:

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This agenda was issued on **Wednesday, 26 February 2020** by the Governance and Scrutiny Support Unit, Manchester City Council, Level 3, Town Hall Extension (Mount Street Elevation), Manchester M60 2LA

## **Economy Scrutiny Committee**

### **Minutes of the meeting held on Thursday, 6 February 2020**

**Present:** Councillor H Priest (Chair) – in the Chair

**Councillors:** Abdullatif, Hacking, Johns, Noor, Raikes, Shilton Godwin and Stanton

**Apologies:** Councillor Green and K Simcock

**Also present:** Councillors: Leese and Richards

#### **ESC/19/7 Minutes**

##### **Decision**

To approve the minutes of the meeting held on the 5 December 2019 as a correct record.

#### **ESC/19/8 Minutes of the District Centres Sub Group**

##### **Decision**

To receive the minutes of the meeting held on the 28 November 2019 as a correct record.

#### **ESC/19/9 The Council's Updated Financial Strategy and Budget reports 2020/21**

Further to Minute ESC/20/02, the Committee considered a report of the Deputy Chief Executive and City Treasurer which provided a further update on the Council's financial position and set out the next steps in the budget process.

In conjunction to the above, the Committee also received the Growth and Development medium term financial plan (MTFP) and budget proposals for 2020/21.

The Committee was invited to consider and make recommendations on the budget proposals which were within the remit of the Committee prior to their submission to the Executive on 12 February 2020.

Some of the key points that arose from the Committees discussions were:-

- Members welcomed that additional investment in district markets had been allocated within the updated budget proposals;
- There was a lack of information within the budget proposals around equality, diversity and inclusion and an assurance was sought that this would be an area of focus; and
- Further information was asked for in relation to the additional income stream that the installation of solar panels on Northwards properties generated for the Council.

The Strategic Director (Growth and Development) clarified that as part of the suite of reports that were being submitted to the Executive, there would be a separate report analysing the Equality Impact Assessment of the 2020/21 budget across the whole Council

The Executive Member for Housing and Regeneration advised that further work was being done to look at Northwards housing in terms of zero carbon ambitions and part of this was around energy supply into the properties and the energy usage. Due to the success of the previous installation of the solar panels, this would be considered more broadly across the Council's housing stock. She added however, that in addressing zero carbon with, initial assessments for the retrofitting of Northwards properties would cost in excess of £200m to carry out the works. She advised that further work would need to be undertaken to understand how this cost could be absorbed but commented that fundamentally a commitment had been made to look at the retrofitting of this housing stock.

The Leader advised that in terms of non-council housing stock, in the first instance making it zero carbon or reducing carbon emissions would have a cost rather than an income. He advised that this was highlighted in the Manchester Climate Change Update report which was going to the Executive on 12 February and had also been considered at Neighbourhoods and Environment Scrutiny Committee on Wednesday 5 February.

### **Decision**

The Committee recommends that their comments be submitted for consideration by the Executive at their meeting on 12 February 2020

### **ESC/19/10 Delivering the Our Manchester Strategy - Update from the Leader**

The Committee considered the report of the Leader of the Council, which provided an overview of work undertaken and progress towards the delivery of the Council's priorities, as set out in the Our Manchester strategy, for those areas within his portfolio.

The Chair invited Dr Marc Hudson from Climate Emergency Manchester to speak. He welcomed that the Council had declared a climate emergency and outlined the role of his organisation, highlighting that they set up a petition to establish a seventh scrutiny committee to specifically look at addressing climate change and a call for the Council to examine other sources of funding, including the use of strategic reserves. He commented that having submitted a Freedom of Information request, it had been highlighted that there had been limited speeches on climate change to Manchester residents from the Leader, Executive Member for Environment, Planning and Transport or the Chief Executive since the Council had passed the Climate Emergency motion in July 2019, and urged that more attention was given to this by local politicians and senior council officials.

Some of the key points that arose from the Committees discussions within the Leaders report were:-

- Was there any further anticipated funding from government to mitigate the impact of Brexit in Manchester;
- Was there any serious prospect of an alternative construction for HS2 to accelerate the construction between Birmingham and Manchester;
- Was there any update on the future of Trans Pennine Express rail service;
- Was there any update on the alternative proposals for Piccadilly train station, given that neither of the two current options were future proof;
- Connected to the above, was there any further update on the future of, Platforms 15 and 16 at Piccadilly Station
- Further information was requested on the multi-agency approach to improving the work and life prospects of the 25% of 50 – 67 year olds in receipt of out-of-work benefits;
- Was there any indication of what the Shared Prosperity Fund would look like and where possible shortfalls in funding might be with lack of access to European funding streams; and
- Was there any update on the approval of the Greater Manchester Industrial Strategy by the newly formed Government.

The Leader advised that at the present moment, it was not expected that government would provide any further funding to Manchester to mitigate the impact of Brexit. In terms of the construction of HS2 between Birmingham and Manchester, GM was proposing an alternative timetable, adding that Government had already indicated that they wanted to accelerate the timetable of the construction of Northern Powerhouse Rail by 2035. In relation to Trans Pennine Express (TPE) rail service, they were the 5<sup>th</sup> worst performing rail franchise in the country and the likelihood in the short term was that they would likely need to reduce the number of services operating due to the failure to undertake work at Manchester Oxford Road and Piccadilly Station. TPE attended and were held to account at the GM Mayors Transport Board which met quarterly and the work to improve the performance of TPE was considered at each meeting.

The Committee was advised that in relation to HS2 and the future of Piccadilly station, work had been commissioned to look at the exiting proposals for the station which had resulted in an alternative option being put forward to deliver a solution that would suitable accommodate both HS2 and Northern Powerhouse Rail (NPR) – a single station, consisting of six platform pointing towards Leeds as opposed Stockport. This alternative had attracted government's interest and a peer review was currently being undertaken. This in turn meant that should the new proposal be successful, all existing HS2 and NPR plans that had been considered though Scrutiny and the Executive would need to be remodelled. In terms of platforms 15 and 16, The Combined Authority was preparing a GM Infrastructure Plan which would cover a wide remit and encompass a review of the Castlefield corridor as well as the future of platforms 15 and 16 at Piccadilly station.

The work with over 50's was effectively taking the working well approach and increasing the number of people put through this approach and although the ambition was to get as many people of working age into work, it was also about improving peoples quality of life.

It was anticipated that announcement around the Shared Prosperity Fund would be made around the time of the budget, bearing mind European Regional Development Funding was still being applied for. Clearly what Manchester was asking for was that the quantum should be equivalent to what was previously received through European funding plus match funding and continued to be devolved.

Furthermore, in relation to the GM Industrial Strategy, the Leader reported that it was anticipated that the newly formed Government would continue to support the GM Industrial Strategy.

### **Decision**

The Committee notes the report.

### **ESC/19/11 Delivering the Our Manchester Strategy - Update from the Executive Member for Housing and Regeneration**

The Committee considered the report of the Executive Member for Housing and Regeneration, which provided an overview of work undertaken and progress towards the delivery of the Council's priorities, as set out in the Our Manchester strategy, for those areas within her portfolio.

The Chair invited Dr Marc Hudson from Climate Emergency Manchester to speak. He welcomed the fact that Northwards Housing had achieved Platinum level for Carbon Literacy amongst their staff and that One Manchester had converted a block of maisonettes to meet the PassivHaus standard as well as deliver new build PassivHaus homes. He commented that it would be good to know when conversations around winning hearts and minds would become Council policy.

Some of the key points that arose from the Committees discussions were:-

- More information was requested on the role of Manchester Housing Providers Partnership and how this information could be shared with all Councillors;
- What were the number of affordable homes that had already been built;
- How many illegal evictions had been addressed;
- More information was requested on the work being done to tackle short term lettings;
- Could an update be provided on the Landlord licensing pilot;
- There was concern around the number of HMO's issued with hazard letters and the enforcement notices served for serious disrepair;
- What was the time scale for the drop in session in connection to Project 500; and
- Had the initial stages of the Northwards Housing review commenced.

The Executive Member for Housing and Regeneration advised that the feedback from the first meeting of the Manchester Housing Providers Partnership had been positive and useful. Going forward it was planned that these meetings would take place on a quarterly basis and will take a steer from Members in terms of theming these meetings in order to address some of the persistent issues that Members are facing in their wards. In terms of the work associated with Winning Hearts and



Minds, this was conversations taking place with the Council's social landlords and was centred around delivering a consistent message around individual responsibilities associated to climate change and the small changes that individuals could make to make a difference.

The Committee was advised that land and resources for over 50% of the Council's affordable housing target had been identified and consultation with Ward Members would be undertaken in regards to specific sites.

The Executive Member for Housing and Regeneration reported that there had been success in relation to the work around addressing section 21 evictions and the work of the compliance and enforcement team, which had focussed around improving standards of accommodation for residents. In terms of short term lets, a task group had been brought together from across the Council to manage the neighbourhood impact of such lets, however, it was commented that a steer from Government was really required, akin to Scotland, in order to provide the powers necessary in Manchester to address the problems associated with such types of lettings.

The Committee was also advised that in terms of Landlord licensing, it was the Executive member's ambition to extend this scheme beyond the current four pilots to an additional four areas. Feedback so far from the pilots has been positive, highlighting that by having a very targeted approach, there was the ability to make a real impact on areas where standards were lowest and presented the most challenges.

It was reported that the HMO licencing scheme was in the process of scaling up and it was anticipated that the impact of this would result in more enforcement action being taken against properties that did not meet the necessary standards.

Furthermore, the Committee was advised that Project 500 drop in sessions had been agreed for the end of February and the Northwards Housing review was in the process of being concluded, which would be reported back to a future meeting.

## **Decision**

The Committee notes the update.

## **ESC/19/12 Overview Report**

The Committee considered a report of the Governance and Scrutiny Support Unit which contained key decisions within the Committee's remit and responses to previous recommendations was submitted for comment. Members were also invited to agree the Committee's future work programme.

## **Decision**

The Committee:-

- (1) Notes the report;
- (2) Agrees the Work Programme as submitted

## ESC/19/13 Northern Gateway Strategic Business Plan

The Committee considered a report of the Strategic Director – Growth and Development, which provided a high level summary of the Strategic Business Plan in the Northern Gateway Joint Venture. The report also provided an update on the current position with regards to the Housing Infrastructure Fund bid submitted to Government by the Council and the proposed approach to ancillary infrastructure funding and delivery arrangements.

The Leader referred to the key points and themes within the report included:-

- It was a requirement of the Northern Gateway Joint Venture Agreement for the Development Manager (FEC) to produce a Masterplan and a Strategic Business Plan, incorporating a Financial Model, for the approval by Northern Gateway Operation Limited (OpCo) and by the respective Shareholders of OpCo (FEC and the Council);
- The purpose of the Strategic Business Plan was to set the strategic context for the Northern Gateway, based upon an overarching Financial Model and to set the parameters for the subsequent Development Area Business Plans;
- The Strategic Business Plan would be updated annually to ensure that it took account of any changes in national and local policy, market sentiment or wider economic implications and was to be used as a mechanism to monitor the progress of delivery of the Northern Gateway;
- The Plan was very ambitious, providing 15,000 homes, of which, at least 3000 would be affordable housing and also a significant amount would be social housing; and
- Overall the Plan would equate to over a quarter of the housing development expected for the city as detailed in the outline Greater Manchester Spatial Framework.

Councillor Karney, Ward Member for Harpurhey addressed the Committee, welcoming the proposals for major housing intervention, including an additional 130 new council homes in the Collyhurst area. He added that it was important that the Council was able to provide affordable homes within the schemes that were within the Strategic Business Plan which were in reach of Manchester residents who wanted to remain in the areas that they had grown up in.

Some of the key points that arose from the Committees discussions were:-

- Members welcomed the proposals within the Strategic Business Plan, including the provision of new homes for people who were already living in the area;
- Had any work been done to scope out the wider social benefit that would be brought about by the proposals within the Strategic Business Plan;
- Assurance was sought that the delivery of infrastructure works, including flood mitigation in the Lower Irk Valley as indicated within the report would not displace any flood water to other parts of the city;
- More information was requested on the proposals to expedite the move to a zero carbon economy including zero carbon development;
- Clarification was again sought on what the definition of affordable housing was;

- Was the tonnage of carbon emissions this Pan was likely to produce known so that plans could be made to mitigate this;
- Consideration needed to be given to how the Strategic Business Plan might impact on existing communities and how these communities could be included throughout the process of development in order to avoid issues that had occurred in other regeneration schemes across the city.

The Leader advised that a lot of engagement with residents within the area that the Strategic Business Plan covered had already taken place, so it was not anticipated that the proposals would come as a shock or a surprise to them. He added that there would only be a relatively small amount of intervention in existing housing stock and that residents whose existing home would be affected by the scheme in Collyhurst would have the benefit of seeing their new homes built before their existing home was demolished. In terms of the definition of affordability, the Leader clarified that this would be what Manchester residents could afford and as set out in the Manchester Labour Manifesto, this would equate to be no more than 30% of a household's total gross monthly income.

The Committee was advised that in relation to the wider social benefits, specifically healthier neighbourhoods, the strategic business case for a new general hospital at the North Manchester General Hospital site had been submitted and an outline business case was proposed for November 2020, with the start of development expected for 2021. He advised that this would underpin a lot of work to achieve the objectives of the Manchester Population Health Plan and Manchester Work and Skills Strategy across the whole of North Manchester, not just the Northern Gateway scheme.

In terms of achieving zero carbon, the Leader explained that this was a real challenge to the whole of the construction industry supply chain, the main challenge at present being the cost in using new materials and providing a more localised energy supply balanced against the ability to deliver the outcomes of the Strategic Business Plan.

The Head of Residential Growth also advised the Committee of the works proposed to mitigate future flood risks within the area covered by the Strategic Business Plan.

## **Decisions**

The Committee:-

- (1) Notes the report;
- (2) Endorses the recommendations to the Executive, these being:-
  - (1) To note the summarised content of the Strategic Business Plan, the detail of which is appended to the Part B report on this agenda.
  - (2) To note the intention of the Development Manager to appoint a Registered Provider partner to assist with the delivery of affordable housing on JV land within the Red Bank and New Town neighbourhoods to help meet the commitment of providing 20% affordable housing within the initiative.

- (3) To note that the Northern Gateway is currently characterised by large tracts of vacant and underutilised brownfield land and that for development of any scale to be delivered, significant “place-making” infrastructure interventions will be required and consequently a strategic approach towards leveraging investment from a range of sources will be necessary, including the capture of S106 developer contributions for the purposes of place-making infrastructure.
- (4) To note the intention to explore options for the preparation of a costed “placemaking” infrastructure strategy for the Northern Gateway against which Section 106 developer contributions can be sought. Note that any such strategy would be brought before Executive as part of a full consultation exercise.
- (5) To note the current situation with regard to the funding submission of £51.6m to the Government’s Housing Infrastructure Fund and the significant potential impact of this funding on the overall viability of the initiative.
- (6) To agree to the principle of ring-fencing Capital Receipts or overage generated from the disposal of Council-owned land through the Northern Gateway Joint Venture for re-investment into supporting the delivery of the Northern Gateway SRF objectives.
- (7) To note the significant contribution that the Northern Gateway initiative can make to the City’s affordable housing delivery ambitions and the various means available to the Council such as the Housing Affordability Fund through which investment can be leveraged to deliver affordable housing at scale within this area.
- (8) To note the summary of the intended content for the production of the initial Development Area Business Plan which will focus on the delivery of up to 1,000 homes in the neighbourhoods of New Cross, Red Bank and Collyhurst and delegate authority to the Chief Executive in consultation with the Leader, Deputy Leader and the Executive Member for Finance and HR to approve the full initial Development Area Business Plan.
- (9) To note that, subject to a positive announcement from Government relating to the Housing Infrastructure Fund, a further report will be brought before Executive regarding the specific terms and conditions applicable in advance of any decision to enter into a Funding Agreement.
- (10) To note that a Social Value strategy will be developed specifically for the Northern Gateway given the value of contracts/works to be carried out and the anticipated duration of the Joint Venture Partnership.

## **ESC/19/14 Exclusion of Press and Public**

### **Decision**

To exclude the public during consideration of the following items which involved consideration of exempt information relating to the financial or business affairs of particular persons and public interest in maintaining the exemption outweighs the public interest in disclosing the information

**ESC/19/15 Northern Gateway Strategic Business Plan (Press Excluded)**

The Committee considered a report of the Strategic Director – Growth and Development, which set out the Northern Gateway Strategic Business Plan as prepared by the Development Manager, FEC, on behalf of the Northern Gateway Operations Limited (OpCo) joint venture company.

The report also provided detail on the scale of FEC investment to date and the level of further investment required.

The Committee asked questions to which the Leader and Officers responded.

The report would also be considered by the Executive at its meeting on 12 February 2010.

**Decision**

The Committee endorses the recommendations to the Executive as set out in the report, those being

- (1) To approve the Strategic Business Plan on behalf of the City Council as one of the two Shareholders in the Northern Gateway Joint Venture.
- (2) Note the financial commitments made to date by the Development Manager, FEC, since the signing of the Joint Venture legal agreements in April 2017.

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**Manchester City Council  
Report for Resolution**

**Report to:** Economy Scrutiny Committee – 5 March 2020

**Subject:** District Centres Subgroup - Final recommendations

**Report of:** Strategic Director (Growth and Development)

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### Summary

At its meeting on 30 September 2015, the Economy Scrutiny Committee considered a report about the changing role of district centres in Manchester and the potential policy and strategy measures which could be adopted to shape the future of the city's district centres. Members agreed that they wanted to see more detailed work undertaken and a more strategic approach developed to the future management of district centres. They recommended that the Council produce an overarching strategy for district centres and agreed to establish a subgroup to contribute to and review this work. The District Centre Subgroup (the Subgroup) commenced its work in March 2016.

The group has overseen a work programme to consider the most effective policy approach the Council and its partners can take to promote successful district centres in Manchester. The work programme has been developed alongside the Institute of Place Management (based at Manchester Metropolitan University), a body with particular interest in the study and promotion of place management.

This report summarises in section 2 the overall programme of work undertaken by the Subgroup. The Subgroup commenced its work with an initial focus on understanding the trends that were affecting district centres. Pilots projects have been undertaken in Chorlton, Gorton, Harpurhey, Northenden and Withington comprising analysis of the performance of each of the centres in detail and holding workshops with representatives from businesses and local communities.

The Subgroup has also:

- held discussions with local traders to hear about their direct experiences in district centres;
- heard from a representative from Transport for Greater Manchester who discussed the role of transport linkages into district centres;
- held a discussion to understand the importance of digital infrastructure to support services and businesses in the centres;
- considered the role of marketing and branding to establish placemaking with specific reference to Ancoats and New Islington;
- examined the role of markets;
- received a report on underserved and emerging communities; and
- considered, in the light of the climate emergency, what role the district centres could play in addressing climate change.

The report also outlines the on-going work by IPM and the Council on centres as part of their roles in the Area Based Collaborative Entrepreneurship in Cities (ABCitiEs) European Partnership.

The work programme described in section 2 of this report has led the Subgroup to bring forward a number of key recommendations set out in section 3 of the report. The recommendations can be broadly split into the following categories:

- The overarching recommendations that have emerged from the IPM work on the case study district centres;
- Actions to be considered by the Council in terms of existing approaches within district centres and where the Council can work with the traders and other partner organisations to facilitate changes in the district centres; and
- Consideration of future policy both in terms of local policy (e.g. through the emerging Local Plan) or on a wider scale in influencing Government policy.

### Recommendations

The Committee is recommended to:

- note the report and recommendations made by the Institute of Place Management (IPM) summarised in paragraphs 3.3 to 3.5 of this report; and
- endorse the District Centres Subgroup's recommendations set out in Section 3 with a recommendation that the Executive be asked to consider and where appropriate endorse the policy recommendations arising from this sub group's work.

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**Wards affected:** All

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| <b>Environmental Impact Assessment</b> - the impact of the decisions proposed in this report on achieving the zero-carbon target for the city |
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| The Subgroup has considered the potential role of district centres in contributing to the overall objective to achieve a zero carbon target for the city by 2038 at the latest. The report identifies that further analysis will be required to assess the role of district centres in contributing to the zero carbon targets by 2038 to inform the development of policies in the new Local Plan. |
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| Our Manchester Strategy outcomes  | Summary of how this report aligns to the OMS  |
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| A thriving and sustainable city: supporting a diverse and distinctive economy that creates jobs and opportunities | The report sets out how the Subgroup has investigated how the district centres can contribute to diversifying the economy; and sustaining and creating local job opportunities.   |
| A highly skilled city: world class and home grown talent sustaining the city's economic success                   | The Subgroup has received and considered evidence from various contributors to demonstrate local initiatives to support the city's economic success.  |
| A progressive and equitable city: making a positive contribution by unlocking the potential of our communities    | The Subgroup has considered local case studies of district centres to understand practical examples of local initiatives that tap into the potential of the communities in the case study centres.  |
| A liveable and low carbon city: a destination of choice to live, visit, work                                      | The Subgroup has considered the potential role of district centres in contributing to a liveable and low carbon city. The report identifies that further analysis will be required to assess the role of district centres in contributing to the zero carbon targets by 2038 to inform the development of policies in the new Local Plan. |
| A connected city: world class infrastructure and connectivity to drive growth                                     | The Subgroup has received and considered evidence on transport accessibility and the role of digital infrastructure.  |

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**Background documents (available for public inspection):**

None

## 1.0 Background

- 1.1 At its meeting on 30 September 2015, the Economy Scrutiny Committee considered a report about the changing role of district centres in Manchester and the potential policy and strategy measures which could be adopted to shape the future of the city's district centres. Members agreed that they wanted to see more detailed work and a strategic approach on district centres. They recommended that the Council produce an overarching strategy for district centres and agreed to establish a subgroup to contribute to and review this work. The District Centre Subgroup commenced its work in March 2016. The group has overseen a work programme to consider the most effective policy approach the council and its partners can take to promote successful district centres in Manchester. The work programme has been developed alongside the Institute of Place Management (based at Manchester Metropolitan University), a body with particular interest in the study and promotion of place management techniques.
- 1.2 Section 2 provides a summary of the key aspects of work undertaken by the Subgroup. The initial work programme of the Subgroup considered the scope of investigation for the group. This involved discussions with IPM to establish the nature of the challenges facing district centres and considering what matters would need to be addressed in any future policy approach. The Subgroup focussed on two specific matters in its early meetings – one around transport linkages into district centres; and secondly, understanding the importance of digital infrastructure to support services and businesses in the centres. Following the initial scoping work discussions were held with a number of traders from across a range of centres (Moston Lane, Didsbury, Chorlton, Fallowfield and Rusholme) plus a representative from the Makers Market. This allowed for members of the Subgroup to hear directly about the experiences of traders and the issues they faced.
- 1.3 The chair of the Subgroup drew together some interim findings in February 2017. The findings were split into three main matters covering general observations; gaps identified in current policy and practice and where progress might be made to cover the gaps; and identifying where potential improvements to the management of district centres could be considered.
- 1.4 A core aspect of the work programme that followed on from the initial discussions comprised the installation of a ten footfall counters to enable usage to be measured and monitored and the establishment of Place Management Pilots in four of Manchester's centres (Chorlton, Gorton, Harpurhey and Northenden). These were exercises that brought together a centre's stakeholders; brought to their attention key evidence relating to activity and character of the centre; and focused on medium and controllable interventions that could be most beneficial for the centre's performance. There are aspects of this process that are clearly aligned with the Our Manchester approach. As part of the work to develop a 'Future High Streets Fund' bid to Government, IPM also ran a pilot study in Withington. The work undertaken by

IPM has been drawn together in a final report, “**Vital and Viable Manchester District Centres**,” which is attached at Appendix 1.

- 1.5 In addition to the IPM pilots, the Subgroup has received a report on underserved and emerging communities which considered communities served by an underperforming district centre, communities without reasonable access to a centre and the need for centres to serve emerging communities. The Subgroup also received presentations on ‘Identity, Branding and Marketing’ and the role of Markets. In the light of the climate emergency declared in July 2019, the Subgroup also considered a report on the role that district centres could play in addressing climate change.
- 1.6 Section 3 sets out the Subgroup’s recommendations for consideration by the Economy Scrutiny Committee and Executive where appropriate. The Subgroup has also made recommendations for consideration by the wider stakeholder group of local traders and other organisations working within the district centres.
- 1.7 The Subgroup at its final meeting (19 February 2020) highlighted the valuable contributions from various parties that had participated in the programme of work undertaken by the Subgroup. The Subgroup wished to thank the traders and other external speakers for their contributions and participation. Moreover, the Subgroup noted their wish that the final report should be circulated to the traders and other external speakers that participated after it has been considered by the Economy Scrutiny Committee.

## **2.0 Summary of Work Programme**

### **Initial Programme of Work**

- 2.1 The Subgroup commenced its work with an initial focus on understanding the trends that were affecting district centres. This involved presentations and discussion with colleagues from IPM to establish the key lines of investigation that the Subgroup would consider. Existing evidence on the nature and current state of district centres was drawn upon with contributions from Subgroup members and visiting councillors, IPM and Transport for Greater Manchester (TfGM). The discussion with Transport for Greater Manchester focussed on the importance of good public transport, cycling and walking links into and within district centres. The Greater Manchester Transport Strategy 2040 was considered and it was recognised that the strategy had a key theme of connective neighbourhoods. District centres were key places for providing local services and goods hence requiring a good level of accessibility by public transport, walking and cycling. Digital infrastructure was also considered by the Subgroup at the request of the Economy Scrutiny Committee. It was recognised that digital infrastructure was necessary to support services and businesses in district centres. The Subgroup considered the future potential delivery of digital services noting the discussions the Council was holding with a number of fibre broadband providers.

## Traders Discussion

2.2 The Subgroup held a specific session where traders were invited from a number of the district centres to provide a view of current conditions and challenges. In advance of the meeting, the traders were asked to consider the following questions:

- Location and types of businesses you represent.
- Why you based your business in its current location/ what do you see as the main benefits of that location for your business or another business like yours?
- What are the main drawbacks of that location for your business?
- If you were relocating your business to another district centre, what would be the key attributes of the area that you would be looking for and why?
- Name one thing you think the Council does well which supports businesses in your area.
- Name one thing you think the Council has the opportunity to improve to support businesses in your area.

The traders covered a wide range of issues in the subsequent discussion at the Subgroup meeting. Key points that emerged focused on the importance of transport infrastructure linking into each centre; the need for marketing of district centres; and the role that markets either played or could play. It was recognised that there was a need to develop a coordinated strategy that identified measures within the control of the Council. Furthermore the Subgroup agreed to identify where actions were best undertaken by traders within the centres or other organisations and where the Council could play a supporting role.

## Interim Report of the Subgroup

2.3 Interim findings were presented by the chair of the Subgroup in February 2017, reflecting on the evidence and discussions held throughout 2016. The findings were grouped around three main themes:

- General observations about the character and role of district centres noting that they served as an “...*essential part of place-making and are really important in creating areas of the city that residents can be proud of, that are important for maintaining sustainable, thriving communities. Districts are an essential part of residents’ identities.*”
- Identified the lines of work that needed to be undertaken to develop greater resilience in existing district centres; and identify the potential need for “new or significantly developed” centres in the east and north of the city.
- Applying Our Manchester principles to enable capacity to be built up amongst local traders and other organisations, recognising that there were varying levels of existing resilience in each district centre.

The Subgroup subsequently paused its work and reconvened in January 2018 where work began in earnest with the place pilots.

### **Manchester Place Management Pilots**

- 2.4 The aim of the IPM Management pilot work has been to:
- develop a better, evidence-based understanding of the key factors the local authority and its partners can influence to create more vital and viable local centres;
  - promote the creation of active collaborative partnerships in centres that are able to bring about positive change; and
  - monitor centre performance.
- 2.5 The work is underpinned by research completed in 2016 by the IPM, which studied the impact changes to retailing in the UK were having on town and city centres. The main outcome of this project was the identification of 25 priority interventions for centre management (see Appendix 2).
- 2.6 Although each centre is different and warrants a different management approach, there has been a common overall format to the Place Management Pilots, reflecting the IPM's experience in other locations. The Place Management Pilots comprise an initial assessment by the IPM, a stakeholder workshop and a final report of recommendations. The initial assessment considered footfall data, collected through counters installed in each of the centres, and an audit undertaken through a site visit.
- 2.7 For the workshops, it was considered important that an appropriate range of stakeholders were invited. Consideration was given to representatives of local businesses (in particular, local traders and land owners), active community groups, service providers and residents. Lists of invitees were prepared through engagement with the council's Neighbourhood Teams and local members. Following an initial presentation of the IPM's academic research, including information regarding centre performance (in particular footfall), attendees were asked to work in groups to identify key characteristics and strengths of the centre. This gave a good sense of the overall range of perceptions of the centre, including the key strengths and opportunities that could provide a basis for action to improve centre performance.
- 2.8 The final section of each workshop urged attendees to consider their role in effecting the changes identified. There is a tendency to assume a lack of control across stakeholders, but the IPM research suggests that, particularly where stakeholders can work effectively as a collective group, considerable influence can be exercised at the local level. For example, footfall data may reveal that the centre has visitors at times when most premises are closed and where a change in opening hours could be beneficial to individual traders and to the performance of the centre as a whole. Whilst single traders may feel unable to effectively influence trading hours, acting as a group the traders are the only stakeholders able to address this issue.

2.9 Following each workshop, the IPM prepared a report for the centre. This summarised the assessment undertaken by the IPM and the outcomes of the workshop. It also included a set of recommendations for further action. Using the 25 priority interventions and the conceptual framework developed through the High Street 2020 project, these were organised around the ideas of:

- Repositioning – realigning a centre’s function based on an understanding of its market position;
- Reinventing – focusing on changing perceptions and image for a centre;
- Rebranding – using measures around branding and public relations to engage more effectively with a centre’s catchment; and,
- Restructuring – seeking to change the physical and governance characteristics of a centre.

### **Identity, Branding and Marketing**

2.10 To understand issues around branding and marketing, the Subgroup received a presentation from Manchester Life (ML). ML is a partnership between the Abu Dhabi United Group and Manchester City Council and was established to respond to the need for housing and to create a thriving and safe neighbourhood in Ancoats and New Islington. ML is a developer and landlord making a long term investment in the area and is investing in creating cohesive communities. It has assembled local developers and building managers to collaborate on community safety and placemaking, and funded additional community policing, street lighting and neighbourhood CCTV. To maximise on the opportunity created by significant capital investment & large scale regeneration of a neighbourhood, ML employs ‘Manchester Life Placemakers’ to build the residents’ sense of community, helping residents to know their neighbours and foster a strong sense of community. The area has now become a very popular residential location as well as a destination with acclaimed restaurants, bars, independent retailers and the Hope Mill Theatre.

2.11 Most district centres in the city aren’t starting from scratch, and have limited opportunities for large-scale investment. However, the key themes from the presentation for improving and creating new district centres support the IPM findings and recommendations and include: the need for a strong well communicated vision; the strength of a Public/Private partnership; and that promotion of community cohesion (e.g. through ‘Placemakers’) and creating a safe and vibrant environment will help create a sense of identity and a stable longer term population.

### **Markets**

2.12 The Subgroup considered the role of markets focusing on two aspects. Firstly, work undertaken to establish a market in Levenshulme was discussed noting the role of the local community in establishing a community led market in 2013. The market’s aim was to address deeper economic issues in the area. It worked with community groups, including groups from black and minority ethnic (BAME) communities, to encourage people to take up the opportunities created by the market. The Levenshulme Market Fund was established which

provided grants to those who wanted to make a difference to Levenshulme high street. It was noted that it had been challenging at the beginning to develop a sustainable market in Levenshulme.

- 2.13 The Subgroup also considered the work of the Council's Manchester Markets operation (retail markets at Longsight, Gorton and Wythenshawe). Business plans are being produced to develop and cosmetically improve the markets at Longsight and Gorton. Although Wythenshawe Market faces additional challenges, plans for the next five years are being developed. The experience of Levenshulme and other markets in the city has shown that developing and sustaining a successful market is not straight forward. The IPM research notes in section 3 the role of markets suggesting that the right offer in the right place can however, make an important contribution to a centre's vitality and viability.

### **Underserved and emerging communities**

- 2.14 The Subgroup considered the matter of underserved and emerging communities which covered three main categories:-
- communities that surround an existing district centre which is underperforming;
  - communities without reasonable access to a district or local neighbourhood centre; and
  - emerging communities without reasonable access to shops and other community facilities or to a designated district centre
- 2.15 The Subgroup discussed the latest trends in the District Centre Survey: Planning Use Classes and how this could link into the on-going centre audit evolved from the IPM district centre Vital and Viable pilots. The Subgroup noted that the majority of Manchester residents live within walking distance of a centre (taken to be 1km). It was noted that residents in Higher Blackley and Charlestown on average live over 1.5km from a district centre. This ties in with the earlier point raised in the interim findings (paragraph 2.3) that there is a particular issue to address in terms of identifying the potential need for "new or significantly developed" centres in the north of the city. New communities expected to emerge over the next 15 to 20 years are mainly concentrated in the extended city centre area. These areas are not currently underserved but it was recommended that the level of provision of shops and other services be kept under review as communities grow.

### **Area Based Collaborative Entrepreneurship in Cities**

- 2.16 The Council along with IPM are partners in the Area Based Collaborative Entrepreneurship in Cities (ABCitiEs) European partnership. As part of this project IPM and the Council have committed to completing a further six pilot projects in centres with footfall counters across the city. These are Withington (work complete), Fallowfield, Rusholme, Levenshulme and Cheetham Hill District Centres and Victoria Avenue Local Centre. Once completed an action plan to trial emerging recommendations will be produced and monitored for two years.

- 2.17 The ABCitiEs project will also fund a workshop for council staff working in the pilot centres. They will review the impact of the project and consider action plans for nurturing effective local networks and will receive training on analysing footfall data.
- 2.18 An ABCitiEs conference will be held in Manchester in 2021 for all partners, stakeholders and interested parties to share the findings of the partnership research and pilot projects to date. The Subgroup identified that officers should work with IPM to identify opportunities to develop some additional training that could be offered to colleagues within the Council to assist in understanding matters such as footfall data.

### **Climate Change and District Centres**

- 2.19 In response to the Climate Emergency declared by the Council in July 2019, the Subgroup considered a report that set out how district centres might contribute to zero carbon targets for Manchester. The main areas covered were as follows:
- The key issues to consider in how district centres link to the climate change agenda;
  - Future opportunities for climate change adaptation and mitigation in district centres;
  - What can the new Local Plan bring forward in terms of new policies; and
  - How can the revised Climate Change Action Plan for the Council influence policy approaches in district centres.
- 2.20 It is clear that the new Local Plan will have an important part to play in setting out land use policies that further develop the approach to climate change already established in the current Core Strategy. Further analysis will be required to assess the role of district centres in contributing to the zero carbon targets by 2038 to inform the development of policies in the new Local Plan. The evidence base already developed by the Tyndall Centre will be invaluable in this work; alongside the analysis recommended by the IPM in their work. Alongside this will be the continuing work for the Climate Change Action Plan driven by the climate emergency declaration. The Overview and Scrutiny Climate Change Sub-group will scrutinise forthcoming work by the Council on climate change. There will be an opportunity therefore to consider how any future climate change related work on district centres, including work undertaken for the new Local Plan can be considered by the Climate Change Sub-group for comment and debate

### **3.0 Subgroup Recommendations**

- 3.1 The sub group's work has sought to better understand the importance of District Centres to the city as a whole. The work has underlined both the important economic role which District Centres play and also the importance that they have in peoples' sense of belonging to a particular place.



3.2 The work programme described in section 2 has led the Subgroup to bring forward a number of key recommendations. The recommendations can be broadly split into the following categories:

- The overarching recommendations that have emerged from the IPM work on the case study district centres;
- Actions to be considered by the Council in terms of existing approaches within district centres and where the Council can work with the traders and other partner organisations to facilitate changes in the district centres;
- Consideration of future policy both in terms of local policy (e.g. through the emerging Local Plan) or on a wider scale in influencing Government policy.

### **IPM Recommendations**

3.3 The place management initial pilot workshops have now all been completed and have illustrated the diversity of Manchester's centres and the roles they play for their local communities and beyond. Following publication of each report, the Scrutiny and Overview District Centre Subgroup has been given the opportunity to review the recommendations and consider whether any short term actions should be implemented.

3.4 IPM has reviewed all the pilots and have produced a summary and recommendations report, Vital and Viable Manchester District Centres which was considered at the Subgroup's meeting in January 2020. The report highlights the following recommendations for the City to consider in the development of new policy support for local centres:

- **Work should be undertaken to develop targeted and place specific interventions to build local collaboration.**
- **Work should be undertaken to increase local capacity to effect change in areas of the city where existing capacity is low.**
- **Efforts should be devoted to enhancing existing local collaborative networks.**
- **Monitoring data on centre performance should be collected and shared with partners so that evidence based actions to improve centres could be taken.**

3.5 Although effective revitalisation of each district centre requires a bespoke response, the IPM have identified some common principles and guidance to inform a citywide approach. In summary these are:-

#### **a) Strengthen local networks and their capacity to effect change**

- It is essential to build community ownership or collective responsibility for each centre.

- Where effective networks of local stakeholders exist, they should be supported to raise their capacity to take further responsibility for centre management and marketing.
- Where networks are less established but are beginning to emerge, MCC should capitalise on already engaged stakeholders to encourage momentum and build capacity.
- Where networks do not yet exist MCC may need to take leadership responsibility, on the understanding that once new community led structures are in place, the authority will need to step back and take on a more nurturing position.
- New and established networks form subgroups to take responsibility for specific interventions (e.g. social media) and environmental improvements.
- MCC should investigate options to identify capacity to initiate greater stakeholder collaboration and facilitate regular meetings. The role will involve networking, leadership and good communication skills. It would also potentially facilitate some greater understanding of district centre management.

**b) Align place making interventions against 25 factors**

- District centre networks are recommended to refer to the IPM 25 Priority Interventions and the 4Rs Framework (Repositioning, Reinventing, Rebranding and Restructuring) as a mechanism for identifying priority interventions. It is important that priorities are set locally and not set from above and that networks focus on factors they can influence at a local level.
- Each centre has individual issues but a top priority across all centres is the visual appearance including litter, graffiti and quality of storefronts and public realm. Traffic and pollution are also a concern in each centre, however, these issues are beyond the remit of local networks and require a strategic response.
- IPM recommend branding is created collectively and managed by local stakeholders utilising low cost social media.
- Improving the resilience of centres is essential which will require many centres to reduce dependency on retail and to consider new uses to create multi-functional centres.
- Introduce more market activity or further capitalise on existing market assets as markets are particularly important drivers of diversity and vibrancy (whilst noting the issues discussed at the markets session at paragraphs 2.12 and 2.13).

- Co-locate key services in central hubs in centres. Public services located together in centres have a significant impact on footfall.

### **c) Monitor and share data to make informed decisions**

- The monitoring and analysis of footfall data has proved crucial in the pilot centres in allowing stakeholders to monitor the routine footfall patterns in each centre, and the impact of interventions to be measured.
- In addition to providing evidence on which to base decision making, the data has also provided a tangible and accessible source of information around which stakeholder groups have coalesced and utilised as a marketing/promotional tool (as exemplified by groups in Chorlton and Withington).
- Footfall provides the only source of round-the-clock insight into how these centres are being used. Therefore, data should continue to be captured and shared with local networks on a regular basis.

3.6 As a result of the Manchester pilots and other research the IPM have reviewed their 25 priority interventions which now include:-

- Markets – The research has identified the central role of successful markets to Manchester’s district centres and has subsequently led to development of successful markets being identified as a new key factor for centre success. IPM found that centre footfall aligns closely with market opening times and days, with less people typically using the centre when the market is closed.
- Functionality – the multi-functional nature of centres, including the key role of co – located public services, is essential as ideally they will serve a variety of purposes
- Innovation – Pop-up activity, such as that seen in Withington, led to this being included.

### **Council actions and working with traders/ other organisations**

3.7 The pilot work in the five district centres has highlighted the value of acquiring good local data with a particular focus on footfall data. There are currently 10 district centres that have footfall data monitoring. This can be combined with the Council’s own monitoring work on assessing all 17 district centres in terms of physical uses as noted in paragraph 2.14. A key consideration is the potential to increase the number of footfall counters to cover other district centres. This requires additional resource and will require further consideration by the Council and potentially other partner organisations as to how this may be facilitated.

**The Subgroup therefore recommends the further dissemination of key information of data including footfall and changes in uses is circulated to relevant stakeholders within each of the district centres. This will help**

**traders and other organisations in the district centres to better understand potential changing patterns within their respective centres.**

- 3.8 Discussions with traders and work undertaken for the five pilot district centres noted that a key aspect is to “get the basics right”. This revolves around looking to address matters such as street cleaning; graffiti on buildings; and pavement and highways maintenance. Any changes to the delivery of public realm services would have to be considered in terms of how this was funded. It could present opportunities to demonstrate good examples of public and private sector services working together better.

**The Subgroup recommends that relevant Council services consider where there are opportunities to improve current practices with respect to the maintenance of the public realm within district centres, recognising that any proposed changes to the delivery of public realm services would have to be considered in terms of how this was funded. It could present opportunities to demonstrate good examples of public and private sector services working together better.**

- 3.9 The IPM work identifies the need to strengthen local networks and their capacity to effect change. The pilots have shown the value of bringing in support via IPM working alongside the Council through its neighbourhood and planning policy teams to build capacity within the centres. This has helped both in terms of defining and monitoring issues in each centre; and identifying/delivering tangible actions to address some of the issues faced in each centre. At the heart of this is how resources, both within the Council and from the traders/other stakeholders in each centre can be identified to assist in developing greater resilience in each district centre.

**The Subgroup recommends that the Economy Scrutiny Committee and Executive instruct officers to develop options for providing the necessary support to local communities to establish and maintain effective collaborative networks within district centres.**

### **Future Policy**

- 3.10 The Subgroup has discussed the role of future policy in helping to support existing district centres and, where appropriate, identify potential new district centres. A key area of work is the review of the Council’s Local Plan which has just commenced a consultation on issues. The review will consider the character and individual needs of each centre, taking into account recommendations from the pilot reports. Policy will be developed to support development that creates multifunctional thriving and attractive centres. Recommendations for planning policy to support collaborative working in centres and consideration of amendments to district centre boundaries will also be considered as part of this work. As part of the Local Plan review analysis will continue to build a better understanding of each district centre and establish whether there is a need for new district centres or amendments to current boundaries.

**The Subgroup recommend that the review of the Local Plan builds on the work and evidence base gathered as a result of the Subgroup's work.**

- 3.11 The Subgroup also considered that opportunities should be taken to influence national policy with respect to district centres. The recently established Future High Streets Fund and the High Streets Task Force provide the Council with a specific link into national funding and policy development, particularly as the task force work is being led by IPM on behalf of the government. The High Streets Task Force has commenced work on a number of pilot projects and Withington is amongst the initial tranche of places that will receive further assistance in terms of training, expert insight, data and analytics, mentoring, and workshops.

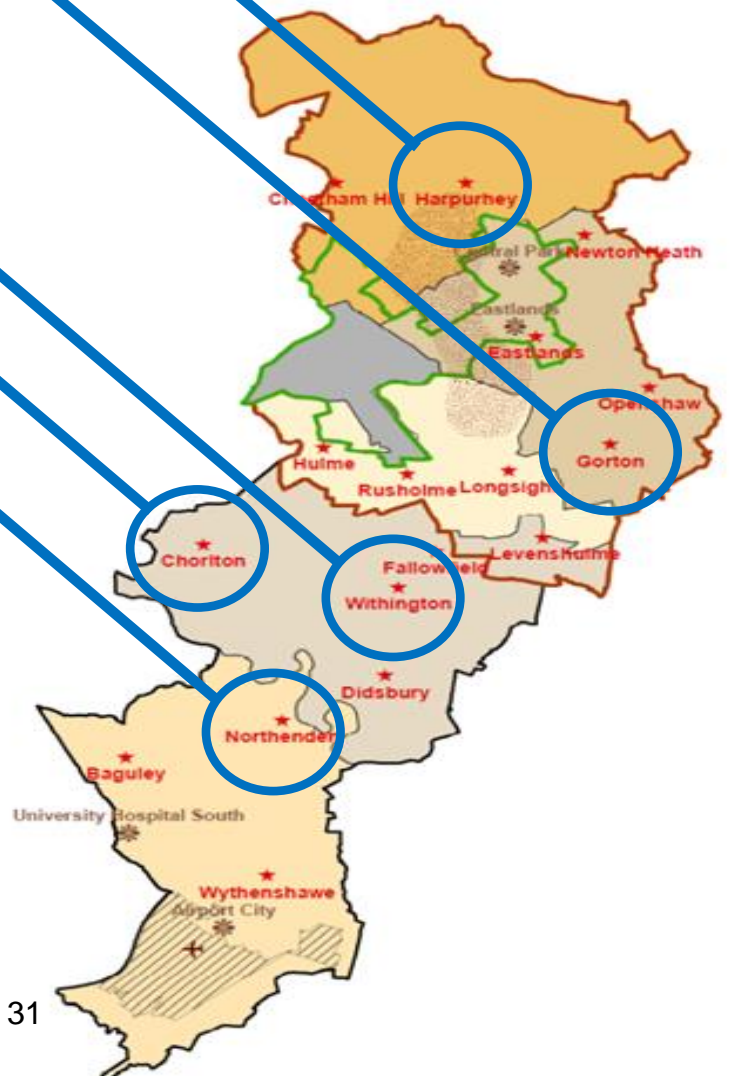
**The Subgroup therefore recommends that the Economy Scrutiny Committee and Executive instruct officers to identify opportunities to influence national policy initiatives including the current link to the High Street Task Force.**

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# Vital and Viable Manchester District Centres

Draft V2 – January 2020



## FOREWORD

There are a number of structural developments currently impacting traditional retail and district centres in the UK, such as the growth in out-of-town and online retailing. However, whilst much research focuses on reversing the fortunes of city and town centres, the project on which this report is based revolves around better understanding how to improve the vitality and viability of Manchester's smaller district centres.

Based on secondary data, primary audits of five district centres in Manchester (Northenden, Gorton, Harpurhey, Chorlton and Withington), meetings with Neighbourhood Managers and community groups/partnerships, workshops held in each centre with local stakeholders, and footfall data recorded 24 hours/day over a two year period, this report explores the activity patterns of Manchester's district centres, in relation to the IPM's 'footfall signature types'. It also outlines the respective centre's key strengths and weaknesses by drawing upon the IPM's 'Top 25 Factors', comparing these across the city. Opportunities and threats are then assessed. It concludes by detailing what stakeholders in these district centres can do going forwards to improve their vitality and viability, in relation to the IPM's '4Rs' framework.

## ABOUT THE INSTITUTE OF PLACE MANAGEMENT

The Institute of Place Management is the professional body for people involved in making, maintaining and marketing places. As part of Manchester Metropolitan University, the Institute of Place Management is dedicated to supporting people who serve places, providing them with unbiased research, continuing professional development, qualifications, conferences, events and networking opportunities.

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# 1. Vital and viable neighbourhoods programme in Manchester: a place management approach

## 1.1 FROM PLANNING TO PLACE MANAGEMENT

A key challenge in the UK over recent decades is how urban regeneration has become predicated on a conventional planning mechanism to promote private sector-led housing and commercial development, sometimes underpinned by the use of public investment to lever investor interest. Whereas this model has proven effective in many towns and cities, in terms of physical development and the revalorisation of problematic brownfield sites, there remains concern to what extent this approach contributes to wider place development. With an absence of place management structures, site-specific physical regeneration projects may generate short-term commercial gain, but often fail to contribute to sustained and wider place improvement.

Nowhere is this more demonstrable than in the crisis affecting British high streets and town centres. As IPM research shows, factors such as maintaining good quality public realm, general appearance, or liveability are essential in terms of maintaining and growing the attractiveness of centres. Responsibility for these place-attributes, however, do not fall within the remit of any single organisation. Rather, they require a collective approach, involving government, business, and other place-based or anchor institutions. The development and management of successful places is also an on-going process. Having a strategy or vision is essential, but this must also connect to day-to-day place operations, such as maintenance or litter collection. With multiple stakeholders invested in town centres and high streets, creating and sustaining networks of plural ownership has proven to be a major challenge, because place development in the UK is synonymous with a silo-approach. This reflects how both national and local government is structured. Planning, housing, environment, transport, education and health, sit within separate administrative and delivery structures, with little crossover or cross-sector collaboration. Subsequently, whereas planning might be able to deliver vast new housing development, or flagship regeneration projects, it has consistently failed to integrate such interventions with places. Many of the UK's waterfront regeneration projects, for instance, stand out as "islands of regeneration", largely disconnected from their immediate localities. It is not surprising to learn, therefore, such developments have largely failed to mitigate structural inequalities within UK cities. Indeed, they may have actually contributed to widening social disparity, through processes such as gentrification.

As places are multi-faceted and complex, effective place management requires multiple and holistic measures. This means engaging existing businesses, service providers, community groups, and other actors at a spatial level that is meaningful to them, and working towards the formal integration of these partnerships into strategic economic development goals.

Place management partnerships or area based collaborative enterprises (such as Business Improvement Districts) are a recognised structure to deliver valuable place-based outcomes, such as inclusive growth, but the current adoption of such structures is very low across Manchester. There are examples where collective responses to ownership has proven to be effective. Levenshulme Market is an example of a community enterprise model, which has developed and sustained an arts, craft and food market in an otherwise relatively deprived part of south Manchester. In the 1980s, the Northern Quarter Association provided an example of significant generator of change in central Manchester, linking over 300 creative businesses, which established a new cultural district in the city. Unfortunately, the network dissipated over time. Ultimately, there are limits to what individual initiatives can do for a place unless they are working collaboratively with other place based stakeholders. Currently, the pattern of local activity within Manchester District Centres remains sporadic and patchy.

## 2. Vital and Viable Neighbourhoods

In 2016, Manchester City Council commissioned the Institute of Place Management (IPM) to undertake a pilot study of the city's District Centres, under a programme entitled Vital and Viable Neighbourhoods<sup>[1]</sup>. To provide oversight, Manchester City Council established a new District Centres Subgroup (answering to the Economic Scrutiny Committee). The aim of this work has been to:

- Develop a better, evidence-based understanding of the key factors the local authority and its partners can influence to create more vital and viable local centres
- Promote the creation of active collaborative partnerships in centres that are able to bring about positive change
- Monitor centre performance

The work is underpinned by research completed the IPM, High Street UK 2020<sup>[2]</sup>, a knowledge exchange project completed in 2016 partially funded by the Economic and Social Research Council (ESRC) who were concerned about the impact changes to retailing in the UK were having on town and city centres. The main outcome of this project were the identification of 25 priority interventions for centre management. Additionally, IPM research demonstrates the value of consistently and rigorously collecting and analysing footfall. This data reveals how centres function in terms their attractiveness, activity patterns and hours, as well as providing a tool for monitoring impact of interventions, and comparing centre performance. Consequently, the Manchester project replicates this methodology, through the installation of footfall counters in ten District Centres, and more in-depth work in five places (Chorlton, Gorton, Harpurhey, Northenden, and Withington). In these cases, the IPM undertook place quality audits and stakeholder engagement workshops, to gather evidence to inform individual District Centre action plans. The action plans benchmark each centre against the IPM 25 priorities, and provide each centre with a framework for achieving change, based on the IPM's 4Rs Framework (Repositioning, Reinventing, Rebranding, and Restructuring). The work generated some tentative recommendations for the City to consider in the development of new policy support for local centres:

- Targeted and place specific interventions to build local collaboration
- Increase local capacity to effect change in areas of the city where existing capacity is low
- Enhance existing local collaborative networks
- Share and monitor data on centre performance

## 3. The changing high street

High streets and town centres across the UK are undergoing significant changes. Over the last 40 years, we have seen the growth of out-of-town shopping, as detailed in Schiller's (1986) so-called 'waves' of retail decentralisation. In the 1970s, 65% of new retail floorspace in England was in town centres; however, by 1994, town centres accounted for only 14% of new stock (Department for Communities and Local Government [DCLG], 2007). This led to tighter planning policies requiring a 'town centres first' approach; but this did not stop out of town development. Town centres continued to see their share of retail expenditure decline and, in 2000, this was just under 50%. In 2018, the Centre for Retail Research (CRR) estimated town centre retail expenditure share as 36.6%, and projected a further fall to 34% by 2022.

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[1]

<https://democracy.manchester.gov.uk/documents/s3273/Vital%20and%20Viable%20Neighbourhoods%20Place%20Management%20Pilots.pdf>

[2] <https://www.emerald.com/insight/publication/issn/1753-8335/vol/10/iss/4>

Although more than four million square metres of out of town retail space was built in the decade to 2011, another driver of falling spend in town centres is now online shopping. In 2018, according to the Office for National Statistics (ONS), it accounted for 18% of UK retail spend, with this figure rising to 18.7% in November 2019 (ONS, 2019). It is further predicted that online shopping will account for more than 50% of all retail spend by 2028 (Retail Economics, 2019). This masks the fact that food retailing online is only 6.5% whilst non-food is 26.5% (CRR, 2018), which must also be considered.

The decline in town centre spend is mirrored in footfall. Over the last 10 years, total footfall in town and city centres has dropped by almost 20% (Springboard, 2019). While some town and city centres have performed very differently to this overall trend, in general fewer people are now visiting town and city centres. The loss of spend and visitors is part of the reason why we are now seeing the closure of many big name retail brands, not only on high streets, but now also in retail parks.

There are other factors to consider, including competition, lack of investment, over-expansion, and how having an online presence reduces the number of branches a store may require to achieve national coverage. Multiples once needed 250 stores to establish a national presence, but now they can trade with around 70 stores with online support (CRR, 2013). Again, there are exceptions to this, but multiple retailers going into administration or announcing store closures have seen over 26,000 units close over the last decade (CRR, 2019). Not all of these stores cease to be retail, with evidence new operators take some on, and others become sub-divided, though data from the Centre for Retail Research suggests store numbers across the UK will reduce by over 100,000 (over 25%) in the decade 2012 - 2022. This gloomy picture, however, neglects to consider the conversion of many stores to non-retail use, such as coffee shops. Nevertheless, these changes are having a significant impact on retail employment; it has been forecasted that 900,000 retail jobs will be lost by 2025, with 164,000 forecast to go in 2019 alone (British Retail Consortium [BRC], 2016).

The focus on retail, however, overlooks how many other services traditionally found in town and city centres are also contracting. Nearly 3,000 bank branches in the UK have closed in the last four years since 2015, and cash machines are also disappearing from town centres, with 3,000 going in the last six months of 2018 (Which?, 2019). Estate agents are also under threat, with over 7,000 currently at risk (Financial Times, 2018), and we are also witnessing closures in travel agencies across the UK and even insurance offices, with Swinton closing 40% of their branches.

The scale of change detailed above is also beginning to impact on retail property values. Recent advice from the Royal Institute of Chartered Surveyors suggests we can no longer rely on past valuations. With the sale of shopping centres significantly below previous values (some to local authorities), and some property owners taking bold steps to mark down, new opportunities are arising to rethink the function of town and city centres.

For example, we are experiencing a so-called 'mobility revolution' due to technological changes within the transportation industry, coupled with consumer behaviour changes such as mounting environmental concerns (Forbes, 2018). The growth in electric vehicles, for example, will do much to improve air quality in town and city centres, with forecasts that the UK stock of electric vehicles could reach between 2.7 - 10.6 million by 2030, and even as high as 36 million by 2040 (Parliament, 2018). Data also shows that young people are not driving as much as in the past. The Department of Transport (2019) demonstrates that in all age bands under 40, there are fewer people with driving licences now than in the 1990s. Indeed, car trips for young adults are down 36% compared to the 1990s (The Centre for Transport & Society, 2018). We are also seeing the development of autonomous vehicles, with forecasts that fully autonomous cars could account for up to 15% of global passenger vehicle sales in 2030 (McKinsey, 2016). Research suggests these trends could increase car-parking capacity in urban areas by 62% (Nourinejad et al., 2018). Technology is also allowing new transport options; apps such as *Whim* offer seamless travel by a range of modes within urban areas and they will become more commonplace as many cities ban cars from their centres. Forecasts also suggest that one in ten cars sold in 2030 will be a shared vehicle, perhaps across many households, as reflective of the broader growth in the sharing economy (Bardhi and Eckhardt, 2012). Together, these changes suggest declining demand for road transport infrastructure and parking.

We are also seeing consumer behaviour changes in the area of growing demands for convenience, instant gratification, and time-saving technologies, with consumers feeling increasingly time-poor in an accelerating consumer society (Reimers and Clulow, 2009). Some retailers are already responding to such concerns; Amazon, for example, is set to roll out 3000+ *Amazon Go* convenience stores worldwide by 2021, where consumers can purchase items instantaneously through smart devices, rather than having to wait in line. We are also seeing a move away from traditional 9-5 working patterns, to more unbounded 24-hour lifestyles (Southerton and Tomlinson, 2005). Accordingly, Springboard (2019) has found the biggest drop in footfall across UK high streets is during traditional 9am-5pm operating hours, suggesting that later opening hours is a possibility for retailers.

As town and city centres transform, they also have to address wider demographic changes in society. The UK population is growing, with estimations that it will surpass 70 million people by 2026 (ONS, 2017). But it is also ageing. It has been forecasted that the number of people aged over 85 will double by 2045, whilst those over 65 will increase by more than a third (ONS, 2017). Town and city centres can have a vital role in providing for the needs of an ageing society, not just through residential provision, but also with activities, leisure, health, and educational facilities and opportunities, especially since this new older group of consumers is likely to continue seeking out new experiences. Some places are already responding to such demographic changes, for instance by joining the growing global network of age-friendly communities (Centre for Better Ageing, 2019).

Finally, although more functional shopping trips for the essentials remains important, especially in district centres, we are also seeing consumers increasingly desiring multi-sensory retail experiences, with trends around temporary pop-up activity (e.g. food festivals, craft beer events, and markets) ‘retail+’, and ‘retailtainment’ apparent in the wider retail environment. In a growing number of stores, for example, courses and activities are provided alongside the merchandise on offer, such as knitting, baking, fitness classes, book clubs, and cocktail mixing. In some larger cities, we are now witnessing the conversion of retail units into showrooms for particular brands; stores where customers might play around with products before buying online. Retailers will also know far more about us in the future through our data, thus enabling greater personalisation. This happens already online, but a growing number of retailers are also introducing personal customisation in-store.

#### 4. What about district centres?

Whilst much attention has been given to improving the vitality and viability of town and city centres, less research has been done regarding district centres – those smaller homely places serving people’s everyday needs, which are at the centre of the Vital and Viable Neighbourhoods Project. However, understanding what a district centre is has long been a difficult task for both planners and academics. This is since they “generally lack the historical associations of market towns, and often have a less clearly defined and established role” (DoE, 1998: 5). Schiller and Jarrett (1985) argued district centres are less specialised than regional and town centres, as they tend to be main weekly shopping centres supplying convenience goods. Whereas, the diversity of district centres led Reynolds and Schiller (1992) to classify them into minor and major, depending on the number of variety stores found within them.

Outside of academic research, in PPG6 a district centre was defined as “groups of shops, separate from the town centre, usually containing at least one food supermarket or superstore, and non-retail services such as banks, building societies and restaurants” (DoE, 1998: 18). In the National Planning Policy Framework, a minor adjustment was made to the existing PPG6 definition, highlighting the importance of local public facilities (such as a library) in district centres, and the social community focus that these centres provide (DCLG, 2012). And hence, although existing research into district centres often focuses on their retail aspects (e.g. Thomas and Bromley, 1993; Wrigley et al., 2010), just as any other type of centre, district centres need to steer away from mono-functional and retail-oriented provision. Instead, it is important to consider any centre, including district centres, as multi-functional places “...supporting leisure and recreation, employment, tourism, heritage, culture, housing, employment, education, health and wellbeing, as well as retail” (Millington et al., 2015: 5). As such, there is a clear need for district centres to also adapt to meet the present and future challenges detailed in the previous section above.

## 5. Lessons from wider experience

In 2014, as part of the ESRC-supported HSUK2020 project, the IPM undertook a comprehensive literature review to identify factors contributing to centre vitality and viability (see Parker et al., 2017). This produced some 160 factors, which formed a point of discussion with multiple stakeholders in the ten UK town centres who were partners in the project. This process identified additional factors, which we could link to published academic research, but it also revealed new factors, yet to be studied by academics. In total, the study identified 201 factors that affect town centre vitality and viability. However, as they stood, they had no sense of priority or importance. Therefore, 22 leading town centre experts drawn from practitioners and researchers were asked to rank them using two scales: how much a factor impacted on town centre vitality and viability, and how much local control could be exercised over a factor. This then led to the 'Top 25 Factors' impacting vitality and viability, detailed in Table 1 below. These factors can provide the basis of an audit tool for assessing district centres, as well a means to determining strategy.



Table 1: High Street UK 2020 25 ranked priority factors impacting vitality and viability

|                             |   |
|-----------------------------|---|
| 1. ACTIVITY HOURS           | Ensuring the centre is open when the catchment needs it. What are the shopping hours? Is there an evening economy? Do the activity hours of the centre match the needs of the catchment?                                  |
| 2. APPEARANCE               | Improving the quality of the visual appearance. How clean is the centre?  |
| 3. RETAILERS                | Offering the right type and quantity of retailers. What retailers are represented?  |
| 4. VISION & STRATEGY        | Having a common vision and some leadership. Do stakeholders collaborate? Is the vision incorporated in local plans?   |
| 5. EXPERIENCE               | Considering the quality of the experience? Measuring levels of service quality and visitor satisfaction. What is the image of the centre?   |
| 6. MANAGEMENT               | Building capacity to get things done. Is there effective management – of the shopping centre(s) and town centre?  |
| 7. MERCHANDISE              | Meeting the needs of the catchment. What is the range and quality of goods on offer?  |
| 8. NECESSITIES              | Ensuring basic facilities are present and maintained. Is there appropriate car-parking; amenities; general facilities, like places to sit down and toilets etc.?  |
| 9. ANCHORS                  | The presence of an anchor which drives footfall. This could be retail (like a department store) or could be a busy transport interchange or large employer.   |
| 10. NETWORKS & PARTNERSHIPS | Presence of strong networks and effective formal or informal partnerships. Do stakeholders communicate and trust each other? Can the council facilitate action (not just lead it?)  |
| 11. DIVERSITY               | A multi-functional centre. What attractions are there, apart from retail? What is the tenant mix and tenant variety?  |
| 12. WALKABILITY             | The 'walkability' of the centre. Are linked trips between areas possible – or are the distances too great? Are there other obstacles that stop people walking?  |
| 13. ENTERTAINMENT & LEISURE | An entertainment and leisure offer. What is it? Is it attractive to various segments of the catchment?  |
| 14. ATTRACTIVENESS          | The 'pulling power' of a centre. Can it attract people from a distance?   |
| 15. PLACE ASSURANCE         | Getting the basics right. Does the centre offer a basic level of customer service, is this consistent? Or do some operators, or parts of the offer, let this down?  |
| 16. ACCESSIBLE              | Each of reach. How convenient is the centre to access? Is it accessible by a number of different means, e.g. car, public transport, cycling etc.?   |
| 17. PLACE MARKETING         | Communicating the offer. How does the centre market and promote itself? Do all stakeholders communicate a consistent image? How well does the centre orientate visitors and encourage flow – with signage and guides etc. |
| 18. COMPARISON/CONVENIENCE  | The amount of comparison shopping opportunities compared to convenience. Is this sustainable?   |

|                          |   |
|--------------------------|---|
| 19. RECREATIONAL SPACE   | The amount and quality of recreational areas and public space/open space. Are there places that are uncommodified? Where people can enjoy spending time without spending money?   |
| 20. BARRIERS TO ENTRY    | Refers to obstacles that make it difficult for interested retailers to enter the centre's market. What is the location doing to make it easier for new businesses to enter?   |
| 21. CHAIN VS INDEPENDENT | Number of multiples stores and independent stores in the retail mix of a centre/High Street. Is this suitably balanced?   |
| 22. SAFETY/CRIME         | A centre KPI measuring perceptions or actual crime including shoplifting. Perceptions of crime are usually higher than actual crime rates. Does the centre monitor these and how does it communicate results to stakeholders? |
| 23. LIVEABILITY          | The resident population or potential for residential in the centre. Does the centre offer the services/environment that residents need? Doctors, schools etc.   |
| 24. ADAPTABILITY         | The flexibility of the space/property in a centre. Are there inflexible and outdated units that are unlikely to be re-let or re-purposed?   |
| 25. STORE DEVELOPMENT    | The willingness for retailers/property owners to develop their stores. Are they willing to coordinate/cooperate in updating activities? Or do they act independently?   |

You can read more about the IPM's HSUK2020 project on the IPM blog [here](#), or alternatively in the Journal of Place Management and Development's open access special issue [here](#).

## 6. District centre strengths, weaknesses, opportunities and threats

### 6.1 STRENGTHS AND WEAKNESSES

In each of the district centres in which detailed research was carried out, their respective strengths and weaknesses were recorded using the above 25 factors as an audit framework. Each centre's individual strengths and weaknesses are set out below, highlighted factors denote a crossover with other centres who share similar characteristics.

| Northenden                             |                                       |
|--|---------------------------------------|
| Strengths                              | Weaknesses                            |
| Factor 8 - Necessities                 | Factor 11- Diversity                  |
| Factor 12 - Walkability                | Factor 13 – Entertainment and leisure |
| Factor 19 – Recreational space         | Factor 16 - Accessibility             |
| Factor 22 – Safety/crime (perceptions) | Factor 17 – Place marketing           |
| Factor 23 – Liveability                | Factor 20 – Barriers to entry         |

| Harpurhey                 |  |
|---------------------------|--|
| Strengths                 | Weaknesses                             |
| Factor 8 - Necessities    | Factor 2 - Appearance                  |
| Factor 9 - Anchors        | Factor 4 – Vision and strategy         |
| Factor 12 - Walkability   | Factor 5 - Experience                  |
| Factor 16 - Accessibility | Factor 17 – Place marketing            |
| Factor 23 – Liveability   | Factor 22 – Safety/crime (perceptions) |

| Gorton                    |                                |
|---------------------------|--------------------------------|
| Strengths                 | Weaknesses                     |
| Factor 8 - Necessities    | Factor 2 - Appearance          |
| Factor 11 - Diversity     | Factor 4 – Vision and strategy |
| Factor 16 - Accessibility | Factor 5 - Experience          |
| Factor 23 - Liveability   | Factor 12 - Walkability        |
| Factor 24 - Adaptability  | Factor 17 – Place marketing    |

| Chorlton                  |                                |
|---------------------------|--------------------------------|
| Strengths                 | Weaknesses                     |
| Factor 1 - Activity Hours | Factor 2 - Appearance          |
| Factor 11 - Diversity     | Factor 4 – Vision and strategy |
| Factor 16 - Accessibility | Factor 12 - Walkability        |
| Factor 23 - Liveability   | Factor 20 – Barriers to entry  |

| Withington                            |                                |
|---------------------------------------|--------------------------------|
| Strengths                             | Weaknesses                     |
| Factor 1 – Activity hours             | Factor 2 - Appearance          |
| Factor 8 - Necessities                | Factor 9 - Anchors             |
| Factor 10 – Networks and partnerships | Factor 11 - Diversity          |
| Factor 13 – Entertainment and leisure | Factor 12 - Walkability        |
| Factor 16 - Accessibility             | Factor 19 – Recreational space |

From this assessment, we are able to draw inferences regarding the overarching strengths and weaknesses of the district centres, as shown in the tables below:

| Overall Strengths         |   |
|---------------------------|---|
| Factor                    | Centres                                   |
| Factor 8 - Necessities    | Northenden, Harpurhey, Gorton, Withington |
| Factor 16 - Accessibility | Harpurhey, Gorton, Chorlton, Withington   |
| Factor 23 - Liveability   | Northenden, Harpurhey, Gorton, Chorlton   |

| Overall Weaknesses             |   |
|--------------------------------|---|
| Factor                         | Centres                                 |
| Factor 2 - Appearance          | Harpurhey, Gorton, Chorlton, Withington |
| Factor 4 – Vision and strategy | Harpurhey, Gorton, Chorlton             |
| Factor 17 – Place marketing    | Northenden, Harpurhey, Gorton           |

In terms of strengths, the centres' multifunctional/convenience town type signature is compounded by a strong performance in related factors. As such we see that necessities (providing the community with essential goods and services), accessibility (being easily reachable by the surrounding population), and liveability (again pertaining to providing goods, services, and an environment that serves the basic needs of the community), are high scoring factors across the district centres. This is unsurprising given that these centres cater for the 'everyday' needs of the local population, as opposed to (with some exceptions) providing a leisure/experiential function.

If we look at weaknesses, appearance ranks poorly across the centres. Whilst not applicable to every centre, there appears to be little joined up thinking in terms of creating a welcoming environment. As such there is a broadly inconsistent appearance, which in some centres is exacerbated by untidiness (litter, graffiti). Appearance ranks

second in terms of its influence on a centre's performance, and is comparatively easy to improve, therefore in a sense this should come as a welcome observation.

The two other areas of weakness apparent across multiple centres are vision and strategy, and place marketing. Both of these factors are intrinsically linked to management, and the structures that are in place to shape and coordinate the direction these centres take. Given that in most centres there is a lack of coordinated collaboration and management evident, it is unsurprising that these factors rank poorly. Without the necessary collective capacity, which is working to some degree of synchronisation, there can be little expectation for places to possess a coherent strategy, and related to this a clear marketing proposition. Therefore, place management needs to be understood as a means of nurturing, growing, and guiding capacity to bring about change in a *collaborative* fashion. These centres need to either introduce management and governance models or, if there are already management structures in place, be willing to restructure their existing models so they are periodically reinvigorated and made fit for purpose. With a coordinated approach that harnesses local capacity effectively, these areas of weakness can be addressed and turned into areas of strength.

## 6.2 OPPORTUNITIES AND THREATS

As we identified in our *High Street UK 2030: Achieving Change* report, "You cannot plan for the centre of the future based on what is happening or known today... We have to think what we know about the changing world (Millington et al., 2018: 45). Therefore, from the project findings, we are able to look across the district centres involved, and identify a number of shared opportunities and threats that need to be taken into account to ensure their vitality and viability going forwards:

| Opportunities  | Threats   |
|--|---|
| Greater collaboration between a range of engaged centre stakeholders   | Potential lack of vision and place leadership   |
| Further sharing of data (e.g. footfall) to enable more evidence-based decision making                            | Failure to track place-based interventions in light of available data (e.g. footfall impacts) |
| Alignment of trading hours with usage (using footfall data as guidance) e.g. re-using markets during the evening | Failing to develop and nurture local place-based partnerships                                 |
| Further provision of entertainment and leisure, moving beyond mono-functional retail offer                       | Not capitalising on Vital and Viable project recommendations and stakeholder enthusiasm       |
| Co-location of key services within the centre  | Not adapting to - or anticipating - ongoing changes in the wider retail environment           |

### 6.2.1 OPPORTUNITIES

During the Vital and Viable workshops, it was clear each district centre has a number of passionate and invested stakeholders who care about making their place better. However, in some centres, this was the first time these people had been in a room together sharing experiences and ideas, having previously worked in isolation. We have found in our wider research with town and city centres across the UK, that many places lack strategic place leadership or have a dysfunctional model of partnership working. Those centres with more collaborative and responsive place management structures, however, are better able to respond to change and challenges in the external environment, and implement and track place interventions more effectively at a local level. Indeed, the HSUK2020 project identified networks and partnerships as a crucial factor impacting any centre's vitality and viability (Parker et al., 2017). Place leadership needs to be understood as something quite fluid, a source of energy, and the capacity to bring about change in a *collaborative* fashion. There is, therefore, a real opportunity in each district centre now to capitalise on the enthusiasm felt in the room during the workshops, and begin to foster a culture of collaborative partnership working. Withington is an especially good example of this; for example, in response to the

workshop findings and footfall data, local independents have recently formed a Traders' Association. Local retailers and other businesses collaboratively extended opening hours and put on events for the successful *Withington by Night* event in October 2019, which led to a footfall uplift of 30% and record takings for a Friday evening. This kind of intervention might prove crucial in sustaining the city's independent sector. Other district centres in Manchester might take inspiration from this example of good practice around stakeholder collaboration.

Furthermore, from our work in other centres across the UK, we have found many places rely on hunches, rather than drawing on research evidence to decide upon and evaluate place management interventions. There is, therefore, a really good opportunity now for Manchester's district centres to collaboratively share research evidence and data (e.g. footfall data) to monitor the impact of any place interventions on centre vitality and viability. The footfall data collected and analysed during the project has been able to demonstrate, for example, the positive impact of community Christmas events on centre vitality in Northenden, Gorton, and Withington, with the potential for this evidence to be drawn upon to support similar future events. District centres should thus ensure to regularly share and discuss data to collaboratively decide upon strategies going forwards.

Another key finding cutting across the district centres in the project, is the importance of providing more than just retail, with issues around experience and diversity emerging as a commonplace area for addressing (Section 6.1). Although providing everyday essentials remains important, there is an opportunity to further enhance multi-functionality (Millington et al., 2015) in these places, especially since diversity, experience, and entertainment and leisure are featured within the 25 priority interventions (Parker et al., 2017). Whilst some centres provide well in the area of entertainment and leisure (e.g. Chorlton and Withington), others are lacking in this area, thus demonstrating an opportunity to further expand or diversify the offer beyond retail in the future.

As well as offering things like community events, restaurants, and leisure activities, markets are particularly important drivers of experience, diversity, and vibrancy, by providing an important place for people to socialise and experience entertainment, as well as buy things. In research undertaken for NABMA, we found an effective market has the potential to increase footfall in a place by up to 27% (Hallsworth et al., 2015). Through workshop discussions and footfall data analysis, we identified the central role of markets to Manchester's district centres, with markets especially important anchors in Gorton and Harpurhey. We found that centre footfall aligns closely with market opening times and days, with less people typically using the centre when the market is closed. There is, therefore, an opportunity for district centres to either introduce more market activity, or further capitalise on these existing assets, potentially expanding market provision and/or extending opening hours to attend to previously discussed trends around consumers increasingly moving beyond traditional 9am - 5pm lifestyles (Section 3). We have also demonstrated in our research, the value of markets, even if temporary, not only re-activate centres, but also lower barriers to entry for new and emerging businesses. In Withington, for example, a temporary Makers Market, has since taken residence of a vacant unit in the centre. Finally, the IPM has recently reanalysed its top 25 priorities, and markets are now identified as a category in their own, signalling their centrality in centre revitalisation. Revisiting how Manchester manages its own markets, and supports other types of markets, is now both timely and crucial.

Finally, we have identified that liveability – another important factor for vitality and viability (Parker et al., 2017) – is a common strength observed across the district centres (Section 6.1), with essential services typically provided well for the local community (e.g. healthcare and professional services). However, we found that Harpurhey is functioning particularly well in this respect, by co-locating key services together in one central hub. This 'community hub model' can create synergies, enable linked trips, and enhance footfall; indeed, Harpurhey enjoys the highest footfall volumes across Manchester's district centres. There is thus an opportunity for other district centres to learn from this approach to service provision in the future, with Gorton already notably following suit. This may mean greater leadership from the Manchester City Council in steering the direction of change in our more challenging centres.

## 6.2.2 THREATS

However, Manchester's district centres also face a number of potential common threats, which should be considered and mitigated against in order to ensure future vitality and viability. As well as the requirement to attend

to – and anticipate - transformations within the broader retail environment, such as online shopping, the mobility revolution, and present and future consumer behaviour trends (Section 3), district centres also need to be mindful of potential challenges around vision, place leadership, and stakeholder networks. As argued above, collaborative partnership working should lead to more effective, sustained, and better-value place-interventions. However, the failure to develop and nurture local partnerships - as facilitated by the stakeholder workshops - or to identify invested and strategic place leaders, will likely result in incoherent visions, strategies, and no collaboratively agreed way forward to enhance vitality and viability. Moreover, by neglecting to track place-based interventions in light of available data (e.g. footfall), centres will be operating on hunches and assumptions, rather than engaging in evidence-based decision making, which would lead to more successful place management plans and strategies. Hence, as already discussed above, centres should regularly share data and insights within collaborative networks to mitigate against these possible challenges. Finally, the district centres also need to avoid the threat of not capitalising on the Vital and Viable project recommendations and stakeholder appetite for change. The suggested 'quick wins' would provide a good starting point for fostering wider engagement, enthusiasm, and galvanising on the energy witnessed during the project; before beginning to think more strategically and collaboratively about long-term visions and strategies within each centre.

## 7. Footfall

A key study underpinning the Vital and Viable Neighbourhood Centres project is [Bringing Big Data to Small Users \(BDSU\)](#). It is a collaborative research and development project funded by Innovate UK, led by retail intelligence specialists, Springboard, and involving the IPM, Manchester Metropolitan University, Cardiff University, MyKnowledgeMap, and other key partners. Springboard have provided footfall data for more than 100 town and city centres, dating back as far as ten years, that looks at footfall changes on an hourly basis. Footfall measures the number of people passing a particular point or points in a centre. It has been recognised in national planning policy statements as the prime indicator of town centre vitality since 1994.

Analysis of this data has identified four basic patterns that have profound significance in thinking about the future of traditional retail centres. The patterns show usage of a centre by month over a twelve-month period. Whilst it had traditionally been assumed that most centres show an increase in footfall in the pre-Christmas period and that this is the busiest time of year, the patterns show that this is not true of all centres. And, even where it is the case, the significance of the upturn in activity has in many cases been over-estimated. It is important to stress that the patterns reflect actual usage of a centre, and that footfall is not the same as retail sales, as people may be in a centre for many other reasons than to shop.

The project has identified that all centres fit within these four pattern types, though some do so more closely than others. It is evident that some towns are changing and are transitioning from one town type to another. The significance of the town types is that data analysis shows that the more closely a town is used in line with one of the patterns, the more resilient its footfall is. Footfall in centres has been reducing as a whole, and the research suggests that will continue as we look to 2020. But towns that have footfall patterns more closely related to the four patterns are seeing footfall decline less rapidly than centres with more hybrid patterns, as they have a clearer offer and image.

The four key footfall signature types identified in the project are detailed below:



### Convenience/community towns and multifunctional centres

The largest group of centres identified by usage (some 40% of all centres considered), termed convenience/community towns and multifunctional centres, have a fairly steady footfall profile throughout the year. Centres of this kind are focused on their local community, their anchor might be food retailing, employment, access to public transport, or a strong resident base. They are places that offer a convenient mix of goods and services.

Understanding what type of centre you are is a basic first step in determining how best to go forward. It also ensures that decisions you make are rational, and hence have a better chance of success. The 25 priority factors for vitality and viability (as discussed in the previous section) will apply to all centres; but the interpretation and implementation of these factors depends to a large extent on knowing what kind of centre you are.

## 8. Recording footfall in the district centres

A footfall counter has been capturing around the clock footfall data in each of the district centres covered since November 2017.

Automated footfall monitoring provides data on the volume of customers in a centre, and is critical for practitioners in the evaluation of whether strategies and initiatives to drive increases in footfall are effective. The dynamic nature of footfall means that this data delivers the most immediate response to any initiative, and so enables practitioners to be able to readily identify the impact of initiatives on the success of the centre. In addition, recording footfall in this way removes the reliance on secondary or associated indicators such as public transport or car parking usage, which often are limited in their effectiveness due to paucity of data or a less than direct correlation to customer activity.

Unlike a planning classification, activity data demonstrates exactly how people are using a centre, and what its main function is (i.e. convenience/community). It also enables the development trajectory and management plan for a centre to be responsive to changes in consumer behaviour and other developments.



Footfall monitoring has a number of key applications and supports a centre by:

- **Demonstrating its success in attracting customers** into the centre
- **Providing an objective measure of performance**, lessening reliance on anecdotal evidence as a measure of success
- **Detecting early warning signs of change**, so that relevant strategies can be implemented
- **Evaluating the success of marketing and promotion** by identifying the additional footfall generated during an event or as a result of a promotion
- **Attracting event sponsorship** by having clear evidence of the success in attracting more visitors to the centre
- **Establishing the contribution of development and public realm improvements** in increasing visitor numbers, both in the short and longer term
- **Providing data required to attract new occupiers and investors** into the centre
- **Providing data to existing businesses** in order to support business retention in the centre
- **Providing data to deliver efficiencies in resource allocation**, eg. cleaning, policing, ambassadors
- **Identifying over or under-performance** by benchmarking against national and regional averages and peer groups to establish whether increases or decreases in footfall are in-line with general trends.

As a result of the counters placed in each district centre, we currently have approximately two years of data that we can use to decipher how these centres are being used. Furthermore, as the data set grows, the longitudinal nature of the information collected will allow us to develop an enhanced picture of how these centres are performing throughout the year, and against previous years. As such, the location of the counter (and the count itself) is of less importance than the usage trends and patterns it allows us to draw out.

In addition to allowing us to ascertain a centre's functionality and overall profile, this insight is invaluable for tracking the success of any interventions which are put into place. A summary of the data collected to date in the five centres is set out below.



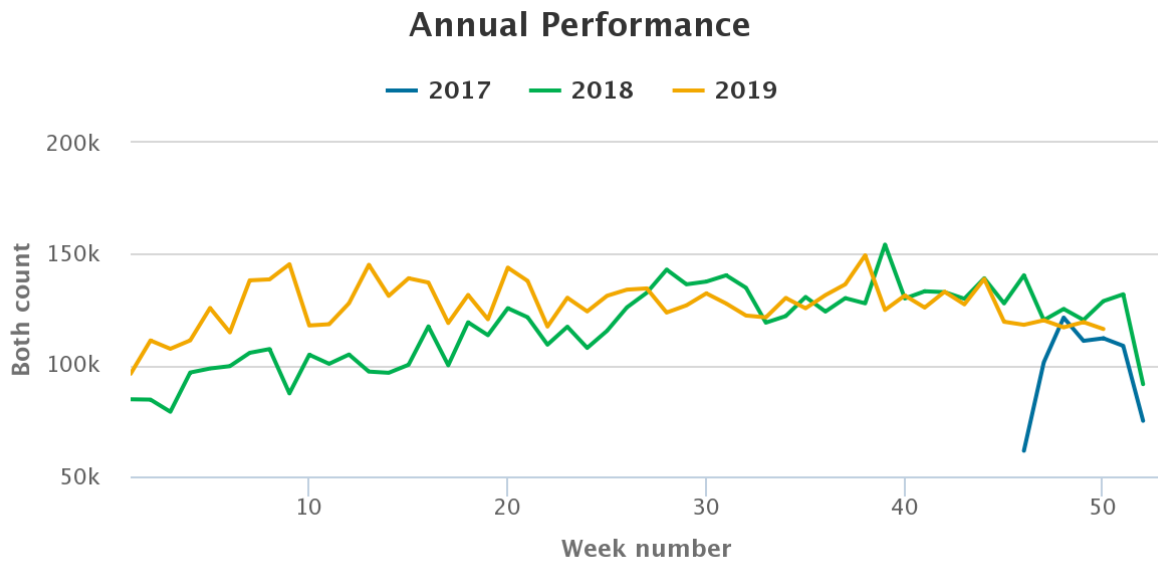


FIGURE 1 – ANNUAL PERFORMANCE OF ALL FIVE PILOT CENTRES

As we can see from the above graph, which displays the combined performance of each of the five centre by week, the profile matches with that of the convenience/multifunctional town type. Not shown in this graph, but clearly contributing to this aggregation, is that all five centres possess a similar broadly flat/consistent weekly footfall pattern. However, despite these centres possessing a similar profile, their volume of use varies significantly:

**Location Comparison (Week 49 : Mon 2 Dec 2019 – Sun 8 Dec 2019)**

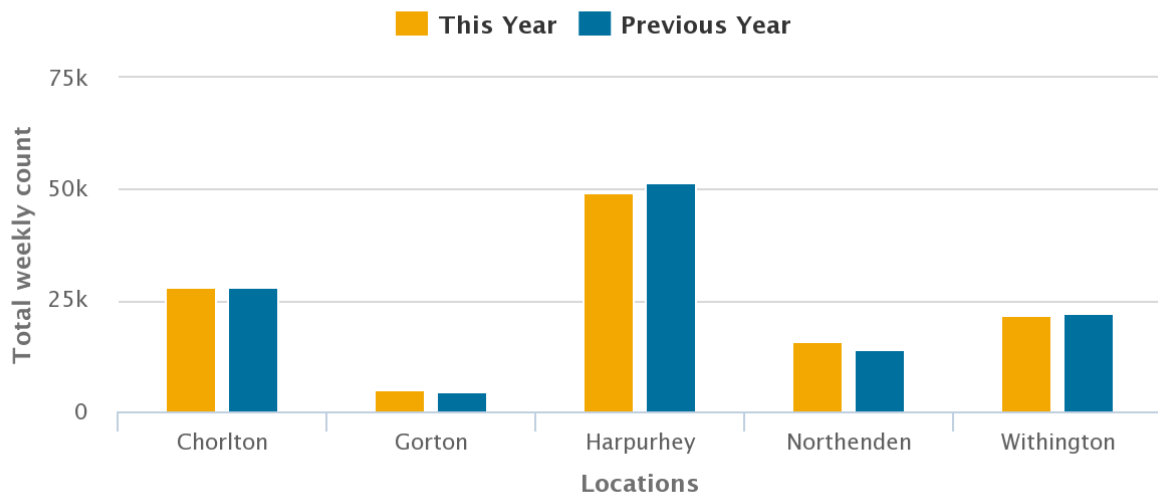


FIGURE 2 – CENTRE COMPARISON FOR WEEK COMMENCING 2<sup>ND</sup> DECEMBER 2019

The graph above, which shows footfall for the week commencing December 2<sup>nd</sup> 2019, shows that Harpurhey’s footfall surpasses all other centres by a significant margin. This is not an anomaly, indeed the respective volumes for this given week are indicative of the general performance of each centre. Whilst the profile of towns and the longitudinal performance is our primary concern, considerations relating to volume can also be made. Centres with a relatively low

volume of footfall through the year need to think about how they are locally connected and focus efforts on improving convenience for people in the immediate area. This may be through ensuring trading hours meet local needs, through introducing new offers such as parcel collection from retail units or lockers, pop-up retailers and restaurants or regular markets which bring in new product lines and services on an occasional basis, home-working and small business facilities, a very strong customer service approach focused on maintaining customer loyalty, or other things that enhance convenience and respond to community need. Centres with a higher annual footfall may be larger and have a stronger retail offer than the average centre, but they have steady footfall flows because they possess multifunctional characteristics. Often, their employment base, hospitality offer, culture and entertainment, strong service offer, and central housing all ensure that footfall remains steady through the year. They also need to think about connectivity, but perhaps at a wider level to lower volume centres, with consideration given to ensuring they can support the range of activities that take place in the centre.

By way of confirming this consistency of footfall, we can look at the centres' daily volume. The graph below shows the combined total volumes for each centre for the week commencing December 2<sup>nd</sup> 2019, with a comparison against the previous week, and against that same week in 2017 and 2018. As we can see, there is a consistent pattern of centres achieving broadly consistent footfall Monday-Thursday, with an increased volume on Fridays and Saturdays, and a drop off on Sundays (when many retailers/service providers are closed).

### Daily Comparison (Week 49 : Mon 2 Dec 2019 – Sun 8 Dec 2019)

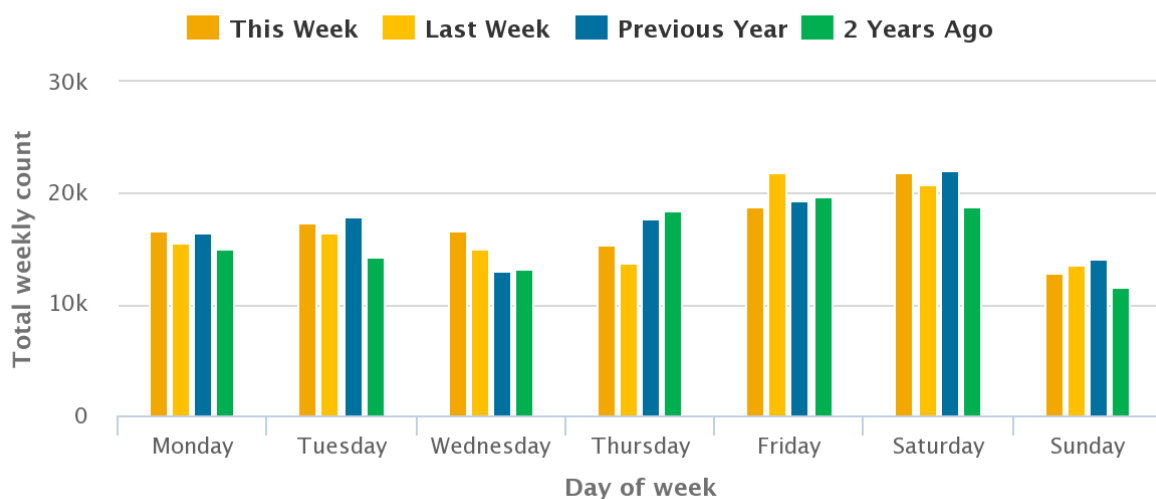


FIGURE 3 – COMBINED DAILY TOTALS FOR CENTRES WEEK COMMENCING 2<sup>ND</sup> DECEMBER 2019

If we look at the centres' hourly footfall average for that week (W/C December 2<sup>nd</sup> 2019), again there is consistent pattern that emerges. We can see that these centres – and again this is in alignment with their convenience/multifunctional signature type – are most heavily used during typical business hours (between 9am-5pm). From a volume perspective Saturday is again an outlier in this respect, unsurprisingly, as people are generally not at work and able to utilize the centre. The usage pattern, however is consistent throughout the week, with the peak volume occurring around midday and tailing off towards late afternoon. Similarly, whilst Sunday is again an outlier in terms of volume, being as it is lower, the usage pattern is comparable to all other days of the week.

### Hourly Comparison (Week 49 : Mon 2 Dec 2019 - Sun 8 Dec 2019)

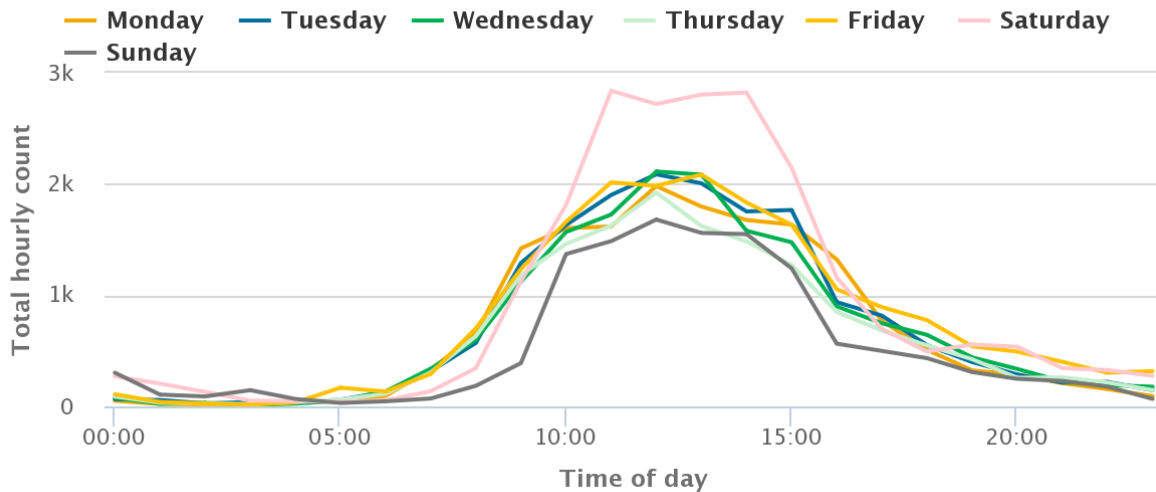


FIGURE 4 – HOURLY TOTALS FOR FIVE CENTRES WEEK COMMENCING 2<sup>ND</sup> DECEMBER 2019

As mentioned above, in addition to assessing the usage patterns of centres, the footfall is also invaluable for tracking the impact of interventions that are put in place in the centres. By way of illustration, the graph below displays the footfall in Withington for the week commencing December 2<sup>nd</sup> 2019. On Friday 6<sup>th</sup> December, Withington held a 'Withington by Night' event which involved entertainment, a pop-up pub, and retailers extending their opening hours. As we can see, the impact of this event is clearly evident, with footfall for that Friday eschewing the usual tail off in late afternoon and sustaining late into the evening. This evidence is very important, as it proves that this intervention was successful, and as such will inform the planning of future events, which can now be orchestrated with the added confidence afforded by this success.

### Hourly Comparison (Week 49 : Mon 2 Dec 2019 - Sun 8 Dec 2019)

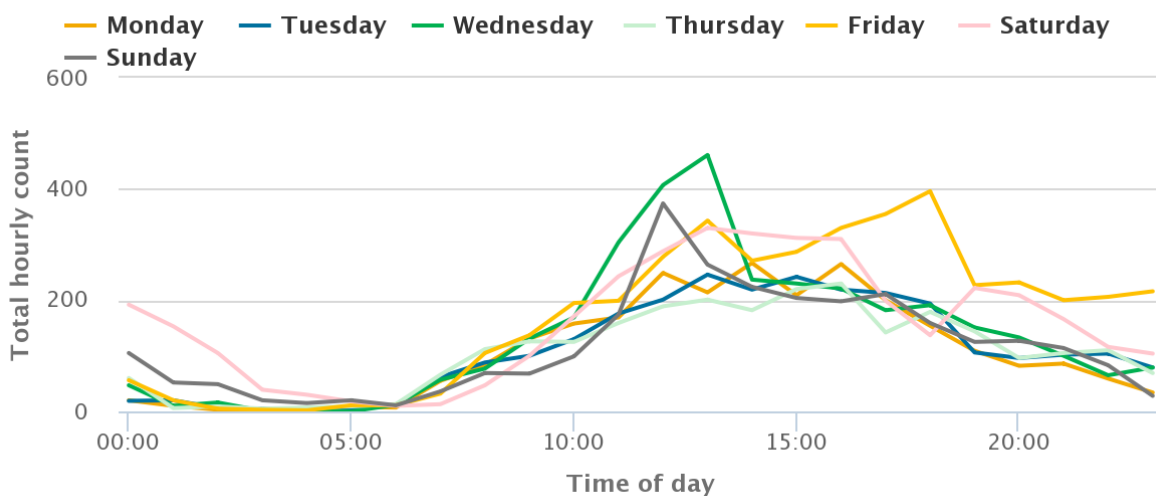


FIGURE 5 – HOURLY TOTALS FOR WITHINGTON WEEK COMMENCING 2<sup>ND</sup> DECEMBER 2019

## 9. Going Forward

The five workshops identified a number of shared concerns and issues about future of each of Manchester's District Centres in the pilot study. For the reasons given above, it was clear that change is needed and action needs to be taken. The precise direction of change, together with the appropriate collaborative partnerships to deliver action, however, will require bespoke measures in each centre. The priorities for Gorton, for example, are not the same as say Withington, and neither is the mix of place based stakeholders and anchor institutions. Each centre, therefore, will need to identify unique groups of willing participants to come together to take responsibility for their place. There are no easily replicable solutions; this has to be worked out locally.

The IPM recommends key local stakeholders in each centre should review in more detail the 25 factors listed above and compare how their place is performing in respect of each. We would also advise also these reviews account for the new and updated 25 factors.

It is important to recognise, that some of the interventions identified for each centre may take years to achieve. This is the case in all locations, and so it is important 'early wins' are also recorded to counter any inertia, poor perception, or to maintain momentum where existing collaborative arrangements are in place.

To assist places to identify priority interventions, the IPM has developed a four-element framework, the 4Rs, for regeneration. The four areas where a difference can be made are repositioning, reinventing, rebranding and restructuring (see Table 2 below). As part of the pilot research, the IPM has identified a framework for action, based on the 4Rs, for each district centre in the study. These are summarised for each centre below.

TABLE 2 - Summary of 4Rs Framework

|  |  |
|--|--|
| <p><b>PRIORITY 1:</b><br/><b>REPOSITIONING</b></p> | <p>Repositioning is a strategy that relates to clearly identifying and communicating a place's market position (Millington and Ntounis, 2017). It can be used to counteract decline, and enables centres to identify potential competitive advantages. The starting point is understanding forces of change, and the value of unique responses that reposition centres. Such responses should build on a place's distinct capabilities, whilst also being accommodative of future trends in order for a centre to be resilient. Knowledge exchange between stakeholders is also crucial in such strategies to generate a shared understanding of a centre's identity and function.</p> |
| <p><b>PRIORITY 2:</b><br/><b>REINVENTING</b></p>   | <p>Reinventing strategies relate to the activities undertaken to revitalise a place's identity and offer (Theodoridis, Ntounis, and Pal, 2017). Any place, however, should understand and seek to meet the needs of its catchment, and be sensitive to these insights when making any changes within a centre.</p>   |
| <p><b>PRIORITY 3:</b><br/><b>REBRANDING</b></p>    | <p>Strategies of rebranding focus upon the application of branding, marketing communications, and public relations techniques in order to deliver a consistent place identity, which relates to the sum of beliefs, ideas, and impressions in the minds of potential consumers of a place (Ntounis, and Kavartzis, 2017). Successful place brand management can lead to positive word-of-mouth, and assist in the transformation of previously negative, or just as problematic, non-existent images.</p>  |
| <p><b>PRIORITY 4:</b><br/><b>RESTRUCTURING</b></p> | <p>Restructuring strategies relate to both governance structures and forms of management, and the physical structuring of a place (Peel and Parker, 2017). The first requires the cooperation of all place stakeholders and creation of strategic networks and public-private relationships that will nurture conditions for the sustainable development of a place, rather than taking top-down approaches. The second requires the proper use of current infrastructure, in addition to the development of new retail spaces to enhance place attractiveness and place development.</p>  |

## CHORLTON 4RS FRAMEWORK

### PRIORITY 1: REPOSITIONING

- Consolidate centre's strength as a functioning place meeting both the basic needs of the community, and leisure destination for a wider catchment
- Strengthen stakeholder capacity to act in a co-ordinated fashion
- Identify a clearer and coherent message about Chorlton's offer

### QUICK WINS

- Neighbourhood team should lead on establishing a stakeholder group
- Use low-cost marketing to reposition the centre (see Rebranding below)
- Protect the centre's diverse and distinct identity by nurturing independent traders
- Review and interpret footfall data, and share analysis

### PRIORITY 2: REINVENTING

- Consolidate reputation as a popular liveable place and leisure destination
- Improve visual appearance of centre
- Widen Chorlton's appeal by marketing the four distinct clusters under one umbrella brand
- Improve connectivity/signage between each cluster to generate synergy, linked trips, dwell and linger times

### QUICK WINS

- Focus on improvements to basic appearance
- Invest in signage, route-making interventions to improve connectivity and legibility
- Measure impact of interventions using footfall data and track longitudinal trends, and consider installation of additional counters
- Encourage new regeneration projects to enhance appeal of the centre e.g. contributions to public realm improvement

### PRIORITY 3: REBRANDING

- Consolidate Chorlton's strong and positive image as a popular residential and leisure destination
- Communicate a clear coherent offer to existing and new audiences
- Develop collaborative approach to low cost digital marketing and new promotional materials
- Bring existing digital branding under one umbrella

### QUICK WINS

- Establish a sub-group to take responsibility for branding
- Ensure branding is co-created locally
- Build on existing strengths to create authentic messages about place
- Engage local independent traders in branding
- Promote existing events, activities and festivals under one brand
- Consider new materials e.g. local traders map

### PRIORITY 4: RESTRUCTURING

- Consolidate Chorlton key strengths as an accessible district centre
- Develop a locally produced vision and strategy for the centre
- Create a joined-up and collective approach to centre management

### QUICK WINS

- Consolidate existing interested local stakeholders by establishing a district-centre stakeholder group, initiated by the Neighbourhood Team
- Form sub-groups to take responsibilities for specific interventions.
- Use meetings to share and review footfall data

### KEY PRIORITIES

- Establish a place management structure to protect the sustainability of the centre
- Consolidate Chorlton's appeal as a desirable district centres and a liveable place, with strong leisure and evening offer by strengthening the clarity and coherence of Chorlton's brand
- Manage the spread of footfall across the four distinct clusters by improving internal connectivity

## GORTON 4RS FRAMEWORK

### PRIORITY 1: REPOSITIONING

- Review and interpret footfall data
- Share data with wider audience
- Initiate encouraging ongoing stakeholder collaboration
- Build on local diversity attractions, such as Gorton Monastery, as means of differentiation

### QUICK WINS

- Neighbourhood team should lead on establishing a stakeholder group
- Once stakeholder capacity in place, share knowledge and generate ideas for interventions to improve appearance
- Use low-cost marketing to reposition the centre (see Rebranding below)
- Review, interpret and share footfall data

### PRIORITY 2: REINVENTING

- Improve general appearance of Gorton
- Create a more recognisable focal point for Gorton e.g. public space, community hub, market reinvention
- Extend opening hours of local amenities
- Diversify the offer by creating opportunities for new business by lowering barriers to entry to local enterprise and young entrepreneurs

### QUICK WINS

- Focus first on low cost and quick to enact improvements to basic appearance.
- Consider hanging baskets, flower beds, In Bloom event
- Measure impact of interventions using footfall data and track longitudinal trends

### PRIORITY 3: REBRANDING

- Build on proximity to nearby attractions e.g. Gorton Monastery, the Belle-Vue Stadium to create a more positive image
- Install signage to direct people to attractions and strengthen internal connectivity
- Introduce public art emphasise these links and reanimate areas in need

### QUICK WINS

- Develop branding/marketing efforts to emphasize proximity to nearby attractions
- Utilise incremental/low-cost rollout of predominantly online branding
- Engage local stakeholders in the development of branding and place-making interventions

### PRIORITY 4: RESTRUCTURING

- Capitalise on engaged stakeholders by establishing a stakeholder group
- Establish sub-groups for specific projects/aspects of place improvement
- Create a joined up collective approach to centre improvement
- Physical restructuring of the market as a focal point for the centre

### QUICK WINS

- Create a stakeholder group through a new partnership/forum/group
- Form sub-groups to take responsibilities for specific interventions.
- Use meetings to share and review footfall data
- Organise regular meetings facilitated by the Neighbourhood Team
- Use meetings to review footfall data

### KEY PRIORITY

- Build on the positives, a functioning well-used community centre.
- Develop engagement with stakeholders in a coordinated fashion, before tackling key issues such as poor appearance and reputation.
- Strengthen links to local attractions and other community assets
- Focus on reinventing the market e.g. night market, opportunities for young creatives

## HARPURHEY 4RS FRAMEWORK

### PRIORITY 1: REPOSITIONING

- Maintain centre's high performance in terms of meeting basic needs of the community
- Reposition Harpurhey as the "centre of the community" or "community hub"
- Strengthen stakeholder capacity (see Restructuring) to act in a co-ordinated fashion

### QUICK WINS

- Neighbourhood team should lead on establishing a stakeholder group
- Once stakeholder capacity in place, share knowledge and generate ideas for interventions to improve appearance
- Use low-cost marketing to reposition the centre (see Rebranding below)
- Review and interpret footfall data, and share analysis

### PRIORITY 2: REINVENTING

- Address negative perceptions of safety to start removing barriers to use of the centre after dark
- Increase prominence and celebrate the market's importance
- Consider extended activity hours at the market to build an evening offer
- Improve appearance to create a more welcoming experience, encourage dwell time, and improve perceptions

### QUICK WINS

- Focus first on low cost and quick to enact improvements to basic appearance.
- Consider hanging baskets, flower beds, In Bloom event
- Prioritise issues around safety and crime
- Measure impact of interventions using footfall data and track longitudinal trends

### PRIORITY 3: REBRANDING

- Increase the visibility of Harpurhey outside the immediate catchment area
- Engage stakeholders to co-create brand
- Engage wider public through a brand design competition/vote
- Focus on improving the centre's physical environment and negative perceptions of safety before increasing promotion

### QUICK WINS

- Build on Harpurhey's image as a functional centre serving the local community
- Shift ownership to community via messages e.g. 'your community centre'
- Engender sense of community using the market as a focus for rebranding
- Utilise incremental/low-cost rollout of predominantly online branding

### PRIORITY 4: RESTRUCTURING

- Capitalise on engaged stakeholders by establishing a stakeholder group
- Establish sub-groups for specific projects/aspects of place improvement
- Create a joined up collective approach to centre improvement
- Physical restructuring of the market

### QUICK WINS

- Organise regular meetings through a partnership/forum/group facilitated by the Neighbourhood Team
- Use meetings to review footfall data

### KEY PRIORITIES

- Build on the positives, a functioning well-used community centre.
- Develop engagement with stakeholders in a coordinated fashion, before tackling key issues such as poor appearance and negative perceptions of safety.
- The market provides an opportunity to both reposition and restructure Harpurhey through extended activity hours to generate both an evening offer and greater diversity of uses.



## NORTHENDEN 4RS FRAMEWORK

### PRIORITY 1: REPOSITIONING

- Build on existing convenience offer by improving leisure/evening economy offer
- Take advantage of green space provision/riverside location as means of differentiation
- Review and interpret footfall data, and share analysis

### QUICK WINS

- Analyse and understand footfall data as an opportunity to engage a wider group of stakeholders
- Upskill local stakeholders to analyse footfall data
- Share footfall data to make informed collaborative decisions
- Neighbourhood team to lead on sharing data

### PRIORITY 2: REINVENTING

- Analyse the extent the district centre meets the needs of the local catchment
- Revitalise offer by emphasizing green space provision
- Improve appearance of centre
- Encourage dwell time and improve perceptions of Northenden
- Raise profile of riverside location as key local asset and visitor attraction

### QUICK WINS

- Increase awareness of riverside/Trans-Pennine Trail location
- Create more visible and frequent signage to the greenspace and riverside areas.
- Organise community events/festivals to attract more people to riverside green space
- Introduce planters/hanging baskets
- Organise an In Bloom style event
- Measure impact of interventions using footfall data

### PRIORITY 3: REBRANDING

- Encourage stakeholder engagement in co-creating a positive, consistent and coherent brand image
- Engage wider public through a brand design competition/vote
- Promote Northenden to immediate catchment

### QUICK WINS

- Incorporate 'the riverside village' message, and heron imagery, into promotional activity to strengthen place identity
- Draw on Northenden's history
- Incremental/low-cost rollout of predominantly online branding

### PRIORITY 4: RESTRUCTURING

- Capitalise on engaged stakeholders by establishing a community/stakeholder group,
- Establish sub-groups for specific projects/aspects of place improvement
- Create a joined up collective approach to centre improvement

### QUICK WINS

- Organise regular meetings through the establishment of a partnership/forum/group, facilitated by the Neighbourhood Team
- Use meetings to review footfall data
- Measure impact of interventions using footfall data and track longitudinal trends

### KEY PRIORITY

- Build on Northenden's relatively strong position
- Improve reputation and image
- Invest in place marketing and community-led social media campaigns to communicate existing offer to local catchment
- Encourage people to use the centre and visit the riverside (linked to local festivals or events)

## WITHINGTON 4RS FRAMEWORK

### PRIORITY 1: REPOSITIONING

- Build on reputation as a liveable place with a credible evening economy
- Widen appeal to local catchment
- Focus on connectivity and linkages to nearby attractors
- Review and interpret footfall data, and share analysis

### QUICK WINS

- Extend activity hours to create better alignment with usage patterns
- Continue temporary events, pop-ups
- Continue support of existing local networks and share footfall data
- Guide the re-use of vacant units to align with perceived needs of existing local catchment

### PRIORITY 2: REINVENTING

- Consolidate reputation as a liveable place and leisure destination, which has everyday necessities and convenience, augmented by an established evening economy
- Establish additional local anchors
- Improve the visual appearance
- Create plans for new public space to encourage dwell and linger times

### QUICK WINS

- Focus on low cost and quick to enact improvements to basic appearance.
- Consolidate digital branding to communicate strong and positive messages the centre offer
- Develop plans to improve connectivity and legibility through placemaking interventions to improve navigability and route making
- Develop plans to improve public realm, including new civic space

### PRIORITY 3: REBRANDING

- Build on Withington's identity and capitalise on temporary interventions
- Encourage stakeholder engagement in co-creating a positive, consistent and coherent brand image
- Communicate offer to both existing and new audiences

### QUICK WINS

- Form a sub-group of independent traders to take responsibilities for branding
- Develop a collaborative approach to low cost digital marketing, to consolidate and promote Withington's unique offer
- Focus first on improving on improving appearance and quality of public realm

### PRIORITY 4: RESTRUCTURING

- Strengthen existing collaborative network of local stakeholders, with a proven record of achievement
- Develop and build a shared vision or consensus about a future of the Village
- Improve general appearance and provide new quality pedestrian realm and civic space
- Improve walkable routes to key local attractors and local catchment

### QUICK WINS

- Nurture existing local networks and raise capacity of local network to address strategic goals
- Future decision making needs to consider the linkages and connectivity between the district centre and important attractors and catchment areas
- Measure impact of interventions using footfall data and track longitudinal trends

### KEY PRIORITIES

- Consolidate Withington image as a desirable location, and conserve its unique identity and heritage and active evening economy, and protect and nurture independent traders
- Diversify the offer to widen appeal to a wider audience
- Improve centre appearance and create stronger linkages to local attractors and catchment
- Build the capacity of existing local networks to take on more strategic development goals

## 10. Conclusions and Recommendations

Although effective revitalisation of town and district centres requires unique and local responses, we have been able to distil some areas of commonality, principles or guidance perhaps, that might inform a citywide approach to the future development Manchester's District Centres. This section, therefore, provides a summary of our wider conclusions and recommendations for future action.

### 10.1. STRENGTHEN LOCAL NETWORKS AND THEIR CAPACITY TO EFFECT CHANGE

We have found local capacity and willingness to work collaboratively to be extremely variable across the 5 District Centres in this Pilot Study. Most effective is the emergent network in Withington, which provides a model place management structure for a district centre. Involving local traders, key local anchors, and place based anchors, this network has already acted on some of the recommendations to initiate small scale but impactful interventions. Our recommendation would be to support such networks, to raise their capacity to take on further responsibility of centre management and marketing. It must be recognised that where such networks achieve success, it may be the case that the nature and composition might need to change if the community are to tackle more strategic ambitions, with new more appropriate structures becoming necessary. Embracing change and understanding that all places are on trajectories, and that place management and leadership are necessarily fluid, is essential.

However, the other centres are at much earlier stages of advancement in this respect. Some have emergent structures, and the city should capitalise on already engaged stakeholders, to encourage momentum and build capacity. Elsewhere, networks are virtually absent, and so it may be the case the City takes on place leadership responsibility, on the understanding that once new community led structures are in place, the authority will need to step back and take on a more nurturing position. It is essential therefore to build community ownership or collective responsibility for each centre, where the local authority works in partnership with local networks. In essence, the local authority's involvement in local collaboration should vary on a need basis.

Once established, it must be recognised that effective place management networks are fluid and adaptable, with shifting membership, as new opportunities or challenges arise. Formal partnerships are perhaps only necessary for more strategic development. We would recommend, therefore, that new and established networks form sub-groups to take responsibility for specific interventions e.g. social media and environmental improvements, to ensure sufficient flexibility and the alignment of appropriate skills and knowledge to tackle the issue being addressed. Widening the range of stakeholders involved only adds further capacity to affect change, and provides an opportunity to develop more inclusive structures. It might become necessary, as well, to draw in landowners and possible national corporate stakeholders into such networks, where appropriate.

However, there is no prescribed model. A governance structure that might work in one place, may be entirely inappropriate elsewhere. We would recommend therefore, a diversity of local governance arrangements, which include the right mix of willing stakeholders able to enact change in their centres.

## 10.2 ALIGN PLACE MAKING INTERVENTIONS AGAINST 25 FACTORS

Again, there is no prescribed model here. Places are complex, unique and dynamic, and the challenges they face will require tailored responses, specific to that place. However, going forward we would recommend District Centres refer to the latest version of IPM's 25 Priority Interventions and refer to our 4Rs Framework (Repositioning, Reinventing, Rebranding and Restructuring) as a mechanism for identifying priority interventions. As we have outlined above, places need to think about both short term and long term objectives. As Withington demonstrates, some quick wins can help galvanise communities and secure the necessary buy-in and support of other stakeholders.

That said, there appears to be a number of common issues cutting across Manchester's District Centres, which we recommend require urgent action in order to sustain footfall and restore vitality and viability. The top priority is the visual appearance of each centre, including matters such as litter, graffiti, quality of storefronts, and overall quality of public realm and civic space. As we know from our own and wider research, intervention is needed here, not only to address poor and negative perceptions, but also to encourage users of each centre to visit, enjoy a quality experience where they might dwell and linger, and ultimately support local business through increased spend. It is also important priorities are agreed locally and not imposed from above.

A recent study suggests 84% of professional place branding campaigns fail. Too often, place branding interventions are not sensitive to the specific needs of places, and impose generic solutions which ultimately fail to meet the needs of user groups. It is essential, therefore, that priorities are determined locally and through consensus. Activities such as place branding need to build on existing strengths and place attributes to construct authentic messages about each place. We would recommend branding is the result of co-creation between local stakeholders, and managed locally by stakeholders utilising low-cost social media.

The research has also identified the central role of markets to Manchester's district centres (and has subsequently led to us incorporating markets as a new key factor for centre success). We found that centre footfall aligns closely with market opening times and days, with less people typically using the centre when the market is closed. We would therefore encourage district centres to consider markets as an important source of vitality, and would recommend existing assets are utilised fully, and where there is currently a lack of provision, to introduce more market activity.

There are wider problems. Traffic levels and pollution are a concern in each centre, however, mitigating against the negative impact of wider structural issues will require strategic responses at a city-wide level, as they are beyond the remit or control of individual centres. Again, it is important that local networks and partnership refer back to the 25 factors, understand what they can or can't influence, otherwise there is potential for local stakeholders to become involved in paralysing debates about factors they can do little to affect.

It is important, however, to consider trends and potential future developments. The retail sector, for example, has experienced an intense period of change, and this will continue. Future proofing centres is essential to maintain centre resilience. As IPM research demonstrates, this will require many centres to reduce their dependence on retail, and to consider new functions (commercial, residential, leisure), to create multi-functionality. Harpurhey is a prime example of how a strong convenience retail offer has been supplemented with a consolidation of public sector services (healthcare, education, and a youth/community centre), rendering the centre eminently more liveable. Co-locating key services together in one central in a 'community hub model' can create synergies, enable linked trips, and enhance footfall; as is exemplified by Harpurhey's strong performance in this regard.

### 10.3. MONITOR AND SHARE DATA TO MAKE INFORMED DECISIONS

The monitoring, analysis and sharing of footfall data has proved crucial in this Pilot Research. It has helped galvanise local traders in Withington for instance, to respond collaboratively to adjust activity hours in alignment with usage patterns. It has revealed the significance of markets as a driver of footfall. And the data has also allowed us to track and monitor centre performance and the impact of interventions. An example of how this data has been invaluable is in Harpurhey, where despite certain negative perceptions, the data revealed the centre to be the most active in terms of footfall of all ten centres where we installed counters. Such information provides vital intelligence, not just for local businesses and the city, but also for developers and landowners, who might now be willing to invest more in their assets. Capturing data on regular basis, and importantly sharing the data within local networks, therefore, is absolutely vital. However, not all centres are doing this consistently and visibly, and it may be the case that additional training and support is needed to embolden local stakeholders or Neighbourhood Teams in data analysis and communication skills.

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## Appendix 2 – Institute of Place Management (priority interventions for centre management)

The priority interventions set out in the table below feature in the IPM final report, “**Vital and Viable Manchester District Centres**” that forms Appendix 1 of this report. The team at IPM have subsequently developed a further iteration of the interventions as noted in paragraph 3.5 of this report. The review of interventions is reproduced below.

As a result of the Manchester pilots and other research the IPM have reviewed their 25 priority interventions which now include:-

- Markets – The research has identified the central role of successful markets to Manchester’s district centres and has subsequently led to development of successful markets being identified as a new key factor for centre success. IPM found that centre footfall aligns closely with market opening times and days, with less people typically using the centre when the market is closed.
- Functionality – the multi-functional nature of centres, including the key role of co – located public services, is essential as ideally they will serve a variety of purposes
- Innovation – Pop-up activity, such as that seen in Withington, led to this being included.

|                      |  |
|----------------------|--|
| 1. ACTIVITY HOURS    | Ensuring the centre is open when the catchment needs it. What are the shopping hours? Is there an evening economy? Do the activity hours of the centre match the needs of the catchment? |
| 2. APPEARANCE        | Improving the quality of the visual appearance. How clean is the centre?   |
| 3. RETAILERS         | Offering the right type and quantity of retailers. What retailers are represented?   |
| 4. VISION & STRATEGY | Having a common vision and some leadership. Do stakeholders collaborate? Is the vision incorporated in local plans?  |
| 5. EXPERIENCE        | Considering the quality of the experience? Measuring levels of service quality and visitor satisfaction. What is the image of the centre?  |
| 6. MANAGEMENT        | Building capacity to get things done. Is there effective management – of the shopping centre(s) and town centre?   |

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| 7. MERCHANDISE              | Meeting the needs of the catchment. What is the range and quality of goods on offer?  |
| 8. NECESSITIES              | Ensuring basic facilities are present and maintained. Is there appropriate car-parking; amenities; general facilities, like places to sit down and toilets etc.?  |
| 9. ANCHORS                  | The presence of an anchor which drives footfall. This could be retail (like a department store) or could be a busy transport interchange or large employer.   |
| 10. NETWORKS & PARTNERSHIPS | Presence of strong networks and effective formal or informal partnerships. Do stakeholders communicate and trust each other? Can the council facilitate action (not just lead it?)  |
| 11. DIVERSITY               | A multi-functional centre. What attractions are there, apart from retail? What is the tenant mix and tenant variety?  |
| 12. WALKABILITY             | The 'walkability' of the centre. Are linked trips between areas possible – or are the distances too great? Are there other obstacles that stop people walking?  |
| 13. ENTERTAINMENT & LEISURE | An entertainment and leisure offer. What is it? Is it attractive to various segments of the catchment?  |
| 14. ATTRACTIVENESS          | The 'pulling power' of a centre. Can it attract people from a distance?   |
| 15. PLACE ASSURANCE         | Getting the basics right. Does the centre offer a basic level of customer service, is this consistent? Or do some operators, or parts of the offer, let this down?  |
| 16. ACCESSIBLE              | Each of reach. How convenient is the centre to access? Is it accessible by a number of different means, e.g. car, public transport, cycling etc.?   |
| 17. PLACE MARKETING         | Communicating the offer. How does the centre market and promote itself? Do all stakeholders communicate a consistent image? How well does the centre orientate visitors and encourage flow – with signage and guides etc. |
| 18. COMPARISON/CONVENIENCE  | The amount of comparison shopping opportunities compared to convenience. Is this sustainable?   |

|                          |   |
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| 19. RECREATIONAL SPACE   | The amount and quality of recreational areas and public space/open space. Are there places that are uncommodified? Where people can enjoy spending time without spending money?   |
| 20. BARRIERS TO ENTRY    | Refers to obstacles that make it difficult for interested retailers to enter the centre's market. What is the location doing to make it easier for new businesses to enter?   |
| 21. CHAIN VS INDEPENDENT | Number of multiples stores and independent stores in the retail mix of a centre/High Street. Is this suitably balanced?   |
| 22. SAFETY/CRIME         | A centre KPI measuring perceptions or actual crime including shoplifting. Perceptions of crime are usually higher than actual crime rates. Does the centre monitor these and how does it communicate results to stakeholders? |
| 23. LIVEABILITY          | The resident population or potential for residential in the centre. Does the centre offer the services/environment that residents need? Doctors, schools etc.   |
| 24. ADAPTABILITY         | The flexibility of the space/property in a centre. Are there inflexible and outdated units that are unlikely to be re-let or re-purposed?   |
| 25. STORE DEVELOPMENT    | The willingness for retailers/property owners to develop their stores. Are they willing to coordinate/cooperate in updating activities? Or do they act independently?   |

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**Manchester City Council  
Report for Information**

**Report to:** Economy Scrutiny Committee – 5 March 2020

**Subject:** High Speed North (High Speed 2 and Northern Powerhouse Rail) Update

**Report of:** Strategic Director (Growth and Development)

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**Summary**

This report provides Economy Scrutiny Committee Members with an update on High Speed 2 (HS2) and Northern Powerhouse Rail (NPR) following the publication of the independent review of HS2 by Douglas Oakervee and the recent announcement on HS2 by the Prime Minister on 11 February 2020.

**Recommendations**

The Committee is requested to note the contents of the report and the key issues raised.

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**Wards Affected:** Ardwick, Burnage, Didsbury East, Didsbury West, Fallowfield, Levenshulme, Northenden, Piccadilly, Rusholme and Woodhouse Park

**Environmental Impact Assessment** - the impact of the issues addressed in this report on achieving the zero-carbon target for the city

At the national level, whilst there are likely to be additional carbon emissions in the short-term from the construction of HS2, the project is likely to be less carbon intensive than other non-rail alternative transport schemes that would deliver similar transport outcomes. More crucially, high speed rail can encourage a modal shift away from car use, especially where it creates capacity on the conventional railway, to encourage more shorter-distance trips by rail.

In addition, improvements to rail capacity will enable more freight to be transported using rail, reducing the number of journeys by road, and has the potential to reduce demand for domestic flights. The integration of HS2 and NPR and investment in new rail infrastructure also provides opportunities for decarbonisation of rail, across the North.

All of these factors are important contributions to taking action on the climate change emergency declared by Manchester City Council, helping to reduce carbon emissions in line with policy aspirations to become a zero carbon city by 2038, supporting the emerging Clean Air Plan for Greater Manchester. The suggestion within the Oakervee report that HS2 be part of national and local strategies which encourage people to move to greener transport modes will further support this.

Major investment in both Manchester Piccadilly and Manchester Airport HS2/NPR stations will provide excellent facilities for public transport connections and support the integration of the transport network in Manchester, as part of the wider integration of transport for Greater Manchester and across the North. This will contribute to the city's and zero-carbon targets and the planning of sustainable transport infrastructure to support future growth.

All new development around Piccadilly under the Strategic Regeneration Framework will be expected to be zero-carbon. Similarly, we will expect HS2 to use sustainable materials and methods of construction, which will not impact on the city's zero-carbon targets - the target for the city to be zero-carbon by 2038 at the latest aligns with the current estimated completion dates for HS2 in 2035-2040.

We are also challenging them on proposals for highways layouts and levels of car parking in the city centre. The Greater Manchester Transport Strategy 2040 will be refreshed in 2020 to better align with the zero-carbon targets. A refreshed City Centre Transport Strategy will also be consulted on in 2020. The draft strategy includes the ambition to reduce vehicles in the city centre, and increase the use of public transport and active travel modes for travelling around, to and from the city centre. If proposals appear to be contradictory to our local policies and targets on climate change, then we will look to petition against those aspects as part of the parliamentary process.

| Our Manchester Strategy outcomes   | Summary of how this report aligns to the OMS  |
|--|---|
| <p>A thriving and sustainable city: supporting a diverse and distinctive economy that creates jobs and opportunities</p> | <p>A high-speed line between Manchester, the West Midlands and London, and the North of England (as proposed by Northern Powerhouse Rail (NPR)) will support business development in the region. The scheme has the potential to provide a catalyst which can attract further investment into Greater Manchester by creating a new gateway into the regional centre and boost investor confidence in the area.</p> <p>Specifically, the proposals for HS2/NPR stations at Manchester Piccadilly and Manchester Airport provide major opportunities for stimulating economic growth and regeneration in the surrounding areas.</p> |

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| <p>A highly skilled city: world class and home grown talent sustaining the city's economic success</p>                | <p>Development of a high speed rail network serving the city centre and the Airport, and the regeneration of the Piccadilly area, together with continued development around the Airport, will provide much needed additional capacity and connectivity and thus contribute towards the continuing economic growth of the city, providing additional job opportunities, at a range of skill levels, for local residents. As part of the high speed rail Growth Strategy, a Greater Manchester High Speed Rail Skills Strategy has been developed, to best enable local residents to access the opportunities created by both the construction of the high speed rail infrastructure and from the additional investment and regeneration arising from it. Manchester's Local Industrial Strategy highlights the importance of growth in key sectors, and the pipeline of jobs they provide, including the construction industry. There is also an opportunity to develop skills in sustainable construction and technologies as part of the delivery of the high speed rail schemes.</p> |
| <p>A progressive and equitable city: making a positive contribution by unlocking the potential of our communities</p> | <p>The economic growth brought about by high speed rail, the regeneration of the Piccadilly area, and further redevelopment around the Airport, could help provide additional job opportunities for residents, as well as improved connections from communities to jobs in the city centre and beyond.</p> <p>The area will also provide new leisure opportunities, including new areas of public realm, accessible to all members of the public.</p>   |

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| <p>A liveable and low carbon city: a destination of choice to live, visit, work</p> | <p>The Manchester Piccadilly Strategic Regeneration Framework (SRF) provides a vision and framework for the regeneration of the Piccadilly area as a key gateway to the city, with a unique sense of place. This could include the creation of new residential neighbourhoods and significant new public spaces. As well as providing new high quality commercial accommodation, the new residential accommodation and the public amenities including public realm, retail and leisure opportunities, will create a desirable location in which to live, work and visit.</p> <p>HS2 will enable the provision of improved public transport, through the capacity released on the classic rail network and, if aligned with Greater Manchester's plans, integration with other transport modes at Manchester Piccadilly and Manchester Airport, encouraging more public transport journeys and less reliance on cars. By reducing the number of vehicles on roads, and in the city centre, carbon emissions are reduced and the scheme will support the emerging Clean Air Plan for Greater Manchester. Releasing capacity for freight journeys to be made by rail also reduces the number of vehicles on the roads and carbon emissions produced.</p> <p>All new development around Piccadilly under the Strategic Regeneration Framework will be expected to be zero-carbon. Similarly, we will expect HS2 to use sustainable materials and methods of construction, which will not impact on the city's zero-carbon, and to minimise car travel to, and car parking at, Piccadilly.</p> |
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| <p>A connected city: world class infrastructure and connectivity to drive growth</p> | <p>HS2, together with NPR and the Northern Hub rail schemes, will bring a step change in rail connectivity both across GM and to the rest of the UK. HS2 and NPR will radically enhance north-south and east-west connectivity between the country's major cities, which will increase labour market accessibility, open up new markets for trade and stimulate economic growth, as well as better connecting people to job opportunities.</p> <p>The city's plans for Manchester Piccadilly and Manchester Airport Station are to provide world-class transport interchanges that can act as gateways to the city and city region.</p> |
|--|---|

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### Background documents (available for public inspection):

The following documents disclose important facts on which the report is based and have been relied upon in preparing the report. Copies of the background documents are available up to 4 years after the date of the meeting. If you would like a copy please contact one of the contact officers above.

- Report to Executive 11 September 2013 - High Speed 2 (HS2) Consultation and HS2 Manchester Piccadilly Strategic Regeneration Framework (SRF)
- Report to Executive 18 December 2013 - High Speed 2 (HS2) Manchester Piccadilly and Mayfield Strategic Regeneration Framework (SRF) Consultations
- High Speed Rail: Investing in Britain's Future (Consultation on the route from the West Midlands to Manchester, Leeds and beyond), DfT, July 2013
- Report to Executive 15 January 2014 - HS2 Consultation – A City Council Response
- High Speed Two: From Crewe to Manchester, the West Midlands to Leeds and Beyond, Command Paper, DfT, November 2016

- Report to Executive 14 December 2016 - Manchester Piccadilly High Speed 2 (HS2) Phase 2 Route Announcement
- Report to Economy Scrutiny 1 February 2017 - High Speed Rail – High Speed 2 (HS2) and Northern Powerhouse Rail (NPR)
- Report to Executive 18 October 2017 - Greater Manchester HS2 and Northern Powerhouse Rail Growth Strategy
- Greater Manchester HS2 and NPR Growth Strategy: The Stops are Just the Start 2018
- Report to Executive 7 March 2018 – Manchester Piccadilly Strategic Regeneration Framework Update 2018
- Report to Executive 27 June 2018 – Manchester Piccadilly Strategic Regeneration Framework Update 2018
- Manchester Piccadilly Strategic Regeneration Framework 2018
- HS2 Working Draft Environmental Statement 2018, available at: <https://www.gov.uk/government/consultations/hs2-phase-2b-working-draft-environmental-statement>
- Report to Economy Scrutiny 7 November 2018 - HS2 Working Draft Environmental Statement (WDES)
- Report to Executive 12 December 2018 - HS2 Working Draft Environmental Statement (WDES)
- HS2 Phase 2b Working Draft Environmental Statement Consultation Response of the Greater Manchester Combined Authority 2018
- HS2 Phase 2b Working Draft Environmental Statement Consultation Response of Manchester City Council 2018
- Report to Economy Scrutiny 5 September 2019 - High Speed Rail – High Speed 2 (HS2) and Northern Powerhouse Rail (NPR)
- Report to Executive 11 September 2019 - HS2 Design Refinement Consultation Response

## 1.0 Introduction

- 1.1 In July 2013, Government launched a public consultation process on the proposed route for Phase 2 of the High Speed 2 (HS2) rail line. In November 2016, DfT published information setting out the Government's preferred route for Phase 2b of HS2, from the West Midlands to Leeds and Crewe to Manchester.
- 1.2 Transport for the North (TfN) was established by Northern Councils, with the support of Government, in 2014 to develop a long-term transport strategy and strategic transport plan for the North of England, to support the ambitions of The Northern Powerhouse. This was followed by the joint publication, by the Government and TfN, of the Northern Transport Strategy in March 2015. Northern Powerhouse Rail (NPR) is one of the key proposals to provide better connections between the Northern cities, through upgraded rail infrastructure, in order to provide a step change in the North's economic growth.
- 1.3 The proposed HS2 Phase 2b route includes stations at Manchester Airport and Piccadilly, as does NPR. Key local strategies, including the Local Industrial Strategy and Greater Manchester Transport Strategy 2040, highlight HS2 and NPR as being vital components of future growth in the city and Greater Manchester as a whole.
- 1.4 A Strategic Regeneration Framework (SRF) for the Manchester Piccadilly area has been approved by the Executive, in response to the opportunity provided by HS2, NPR and other rail investment, to create a world class transport hub and arrival point into the city. Manchester Piccadilly represents one of the biggest development opportunities in the UK and it is essential that the benefits associated with the growth in the area around the station are maximised. The 2018 Manchester Piccadilly SRF sets out the vision to deliver a fully integrated station, connected to the city centre and surrounding development.
- 1.5 The City Council, together with Transport for Greater Manchester (TfGM), Trafford Council and Manchester Airports Group have published the Greater Manchester HS2 NPR Growth Strategy: "The Stops are just the Start". The Growth Strategy is designed to maximise the benefits from high speed rail investment, to the areas surrounding the proposed stations at Manchester Piccadilly and Manchester Airport, the wider Greater Manchester region, and across the North. The Growth Strategy sets out the opportunity to create by 2051: 96,000 new jobs (54,000 net), 17,000 homes, 1.5 million sq. ft. of commercial floorspace.
- 1.6 In 2019 the chairman of HS2 Ltd., Allan Cooke, published a stocktake reporting on the current position of the scheme in terms of its costs, deliverables and timescales for the project. Later in 2019, the Prime Minister requested an independent review of HS2 by Douglas Oakervee. Both of these reports have informed the Prime Minister's recent decision to announce his support of the scheme, and opportunities for further integration of HS2, NPR and other rail investment in the North.

- 1.7 This report summarises the background and current position following key announcements by the Prime Minister and outlines the remaining key issues for moving forward both HS2 and NPR initiatives in Manchester.

## 2.0 Background

- 2.1 In September 2019 a redacted report from the HS2 Chairman, Allan Cook, was published. This report gave advice to the Department of Transport (DfT) on the deliverability of the HS2 programme. The report advised that HS2 is a key enabler for the national Industrial Strategy and the individual growth strategies being developed by each region, to address the rebalancing of the economy in the North. HS2 is an integral part of the plans for Northern Powerhouse Rail (NPR) and Midlands Connect, providing 50% of the new lines needed by NPR. The opportunity to fully integrate plans for HS2 and NPR is recognised in the report.
- 2.2 In the North and Midlands, the report summarises that HS2 will provide an estimated 500,000 additional jobs and nearly 90,000 new houses, unlocking industrial, regenerative and economic benefits.
- 2.3 The report found the costs of delivering the current scheme design were now estimated at £72 to £78bn, in 2015 prices, compared to the original budget of £55.7bn. (Please note that this differs from the estimated costs given in Douglas Oakervee's report – see below – of £62-69bn, but this report was not based on a full cost review). The report also found the scheme could not be delivered on time and set expected timescales for opening of Phase 2b to 2035-2040 instead of 2033.
- 2.4 The Connecting Britain Campaign was established in 2019, as a coalition of business and cross-party political leaders. Leaders in the North have come together, with one voice, to make a positive case for why the North and Midlands need both HS2 and Northern Powerhouse Rail (NPR). The nine founding partners are: Bradford City Council, Cheshire East Council, Leeds City Council, Liverpool City Council, Manchester City Council and Warrington Borough Council, in addition to Greater Manchester Combined Authority, Liverpool City Region and West Yorkshire Combined Authority. Recently the campaign has been joined by other authorities and business leaders, creating a unified voice in support of the full HS2 ("Y" network) and NPR network being delivered. The campaign has demonstrated both initiatives, as well as local schemes, are needed to unlock capacity and connectivity and rebalance the U.K. economy.
- 2.5 In August 2019, a six week review of the HS2 project was requested by the Prime Minister. Douglas Oakervee, a former Chair of HS2 Ltd., was appointed to chair the review. Under the published terms of reference, the review proposed to examine cost estimates and opportunities for savings and changes to the scheme, the environmental impact, and the economic and business cases for both Phases 1 and 2.

- 2.6 The review originally expected to report to the Prime Minister in Autumn, was delayed due to the general election held in December 2019. The report was published on 11 February 2020. The key messages and recommendations from the review are summarised in sections 3 and 4 of this report.
- 2.7 Members may recall that the Deputy Chair of the review panel, Lord Berkeley, published his own dissenting report, which claimed that the costs of HS2 could best be cut by improving “Northern Powerhouse” and Midlands connect rail links instead. It should be noted that this option was considered, and rejected, within the final report published by Douglas Oakervee. As outlined below, this report concluded that HS2, NPR, and local rail improvements, should all be taken forward as part of an integrated plan. The Prime Minister’s announcement did not support Lord Berkeley’s report, and all other members of the review panel supported the findings of the official review report.
- 2.8 In September 2019, TfN’s Partnership Board (which includes the GM Mayor) requested an independent review of the station options at Manchester Piccadilly. Richard George was appointed to undertake the review, which is expected to report to the Partnership Board on 12 March 2020. Manchester City Council, GM and other Northern partners welcome this review, as the optimisation of Piccadilly Station is crucial for connectivity, reliability and capacity of train services across the North, as well as passenger experience and maximising the regeneration opportunities around the station. GM partners have met with Richard George to give input into the review, and will review the outcomes of the published report when it is shared. It is expected that the TfN Board will use the outcomes of the review to inform how to move forward on the solutions at Piccadilly and the onward network to Leeds.
- 2.9 Manchester City Council, Greater Manchester partners and the Connecting Britain campaign group all submitted responses to the Oakervee Review. The Leader and officers from the Council met with Douglas Oakervee to discuss key local issues and priorities in Manchester.
- 2.10 Manchester City Council and Transport for Greater Manchester (TfGM) commissioned Bechtel to review planning and design work for Manchester Piccadilly Station and to examine capacity, reliability, resilience and future-proofing of the station options proposed. It was requested by the GM Mayor that the Bechtel work is included in TfN’s independent review of Manchester Piccadilly by Richard George. It was also submitted as evidence to the Oakervee review.
- 2.11 In HS2 Ltd.’s current CP3 design the HS2 and NPR platforms at Piccadilly Station are designed as a surface turn back station. The Bechtel report found the current design for Manchester Piccadilly Station is less than optimal and significant opportunities for future proofing the design for growth and maximising development around the station are missed. The report highlights that there is potential for cost savings, and improving reliability and capacity, by changing the design and layout of the station. However, further work would need to be undertaken to assess the options. The report recommends further assessment of the design to meet stakeholder’s requirements and future

potential growth of train services. A recommendation is also made to re-examine areas relating to engineering feasibility, and technical standards adopted by HS2 that may have adversely influenced the station design.

2.12 Additional points raised in the Council's submission to the review of HS2 are summarised below:

- The need for HS2 and NPR to be developed under a single, strategic plan to maximise value and efficiency, and minimise blight.
- The importance of confirming the need for an efficient delivery vehicle(s) for HS2 and NPR, with appropriate local and regional governance arrangements to reflect the wider economic potential that the schemes offer in principle.
- Phasing should deliver the benefits of capacity and speed at the right time to enable planned growth at the Airport and Piccadilly to occur in a sustainable way.
- The need to establish a whole system mechanism to support the delivery of the Greater Manchester Growth Strategy, which has the potential to enable over 96,000 new jobs (54,000 net), 17,000 homes, and 1.5 million sq. ft. of commercial floorspace.
- The need to consider different solutions that could facilitate a reduction in costs, and that could be provided at Manchester Piccadilly if there was a combined strategy for HS2 and NPR, and the construction of platforms 15 & 16 as part of the Northern Hub programme (currently awaiting decision), to secure maximum benefits from a fully integrated station.
- Specific issues needing to be addressed to deliver the Growth Strategy including appropriate highways and car parking solutions, wider connectivity and Metrolink integration, construction phasing and maximising regeneration benefits around the stations.

### **3.0 Prime Minister's announcement on HS2 and NPR**

3.1 On 11 February 2020, the PM made an announcement on HS2. His speech detailed the publication of the independent review of HS2 by Douglas Oakervee, and the confirmation that the project will go ahead for both Phase 1 and 2.

3.2 Key points made as part of the Prime Minister's announcement included the following:

- The review by Douglas Oakervee confirms the case for HS2, which is about increased capacity as much as faster speeds.

- Commitment to the full scheme, but with greater discipline on budget and timescale, with an aspiration to start services on Phase 1 by the end of the decade.
- The need for both HS2 and NPR.
- A new Minister and Ministerial group to oversee the project.
- New delivery arrangements for both Euston station and Phase 2b.
- The production of an integrated rail plan for the North. The “High Speed North” plan will be informed by an assessment from the National Infrastructure Commission, and will look at how best to design and integrate rail investment across the North, including HS2, NPR and other local rail improvements.
- Work with Northern leaders to explore options for creating a new delivery vehicle for ‘High Speed North’.
- Other local transport improvements, including investment in bus services, cycle routes and local rail networks.

3.3 In the Conservative Party Manifesto 2019, the following transport related policies were included, which link to the announcement outlined above:

- Reaching Net Zero by 2050 with investment in clean energy solutions and green infrastructure to reduce carbon emissions and pollution.
- We will consider the findings of the Oakervee review into costs and timings and work with leaders of the Midlands and the North to decide the optimal outcome.
- We will build Northern Powerhouse Rail between Leeds and Manchester and then focus on Liverpool, Tees Valley, Hull, Sheffield and Newcastle.
- We will give city regions the funding to upgrade their bus, tram and train services to make them as good as London’s, with more frequent, better-integrated services, more electrification, modern buses and trains and smart ticketing.
- We will end the complicated franchising model and create a simpler, more effective rail system, including giving metro mayors control over services in their areas.

#### **4.0 Publication of the Independent Review of HS2 by Douglas Oakervee**

4.1 The Prime Minister’s speech draws on the full report by Douglas Oakervee. Other key findings and recommendations within the report include:

- The full network is needed to realise the highest value for money and economic benefit. Government should commit to the full Y-shaped network (to both Manchester and Leeds).
- There are no ready alternatives to HS2 and development of these would take years to identify and design, with significant disruption. There would also be a significant impact on the supply chain and the UK construction industry if HS2 were cancelled.
- HS2 should be planned as part of the national rail network and other transport strategies.
- Government should deliver service improvements in the North and Midlands as soon as possible. The report recommends a study into an integrated railway investment programme for the North and Midlands (including NPR and Network Rail's Enhancement Programme), with planned annual spend.
- Smaller Bills/phases may allow easier scrutiny and faster construction.
- There is a need for design optimisation to save costs, especially for later phases, and a greater role for the private sector in funding stations and for realising commercial benefits from the scheme.
- The need for better stakeholder engagement with communities.
- There should be a focus in Phase 2 on reducing carbon emissions in construction, and for HS2 to be part of an integrated strategy towards modal shift away from car travel.
- It is vital that HS2 stations are closely integrated with the existing transport networks, the urban context, and local policies.
- There is a need for a revised business case for the overall project, highlighting the full economic impact of HS2, including the potential impact of HS2 on economic rebalancing and the number of homes and jobs.
- HS2's governing arrangements need to be evolved and strengthened.

## **5.0 Terms of Reference for the Integrated Rail Plan for the North & Midlands: High Speed North**

- 5.1 The Government published the Terms of Reference for the Integrated Rail Plan for the North and Midlands: High Speed North on 21 February 2020. This document states that the Government will work with local leaders to draw up the Integrated Rail Plan, and that the work will be informed by an assessment from the National Infrastructure Commission (NIC), looking at rail needs for the Midlands and the North. The plan is due to be published by the end of the year.



5.2 It is also stated that the Government will proceed with the legislation for phase 2b, provided that it does not pre-judge any recommendations or decisions that will be taken in the plan, and noting that Phase 2b can be legislated for in two or more bills, which may run concurrently.

5.3 Under the Terms of Reference, the plan will consider the following:

- How best to integrate HS2 Phase 2b and wider transport plans in the North and Midlands, delivering benefits from investments more quickly, including a recommended way forward on scoping, phasing and sequencing delivery of HS2, NPR and other proposed rail investment. This assessment will take into account a number of things, including: Government commitments; the current state of development of different projects; the benefits of different schemes; fiscal and supply chain constraints; and the appropriate mix of high speed line and upgrades of the conventional network.
- How best to reduce cost, including opportunities to reconsider Phase 2b scope and design standards, drawing on lessons learnt from Phase 1.
- The recommended approach to delivery, including governance and delivery models, and how to take account of the views of local leaders.
- How best to deliver rail connectivity to Scotland.

5.4 The Terms of Reference also gives details of a review of the lessons learnt from Phases 1 and 2a, which will be undertaken by the Infrastructure and Projects Authority. This review will provide lessons learnt to inform Phase 2b, which will input into Integrated Rail Plan. It will consider decisions made in Phase 1 to date and recommend potential changes to specifications to reduce final costs.

## **6.0 Key Implications for Manchester and Greater Manchester**

6.1 Following the Prime Minister's announcement, the Secretary of State for Transport, Grant Shapps, met with a number of Northern Leaders, including the Leader of Manchester City Council. At this meeting, the Secretary of State categorically confirmed that Phase 2b of HS2 will definitely go ahead, without the need for further review of the project, and to an accelerated project timeline. There was a joint understanding that a fully integrated rail system that connects HS2 to Northern Powerhouse Rail (or High Speed North) is the only way to truly rebalance the country's economy.

6.2 The overall announcement that the full HS2 scheme is to go ahead, and that it will be better integrated with NPR/High Speed North and other rail improvements across the North, to be delivered as soon as possible, is clearly a very positive message for Manchester, as well as for the rest of the North and the UK. We support the view that, as well as HS2 and NPR initiatives, enhancing rail capacity in the shorter term is needed, through the delivery of improvements in rolling stock and infrastructure capacity to support the city's economy in the next 5 to 10 years.

6.3 There are some very clear opportunities for the city and city region arising from the Prime Minister's announcement, and the messages in the Oakervee report, a number of which support issues that we have been lobbying the Department for Transport, HS2 and Transport for the North about for some time. In particular, the proposal for an integrated High Speed North plan, presents a real opportunity for the Council, together with other Northern areas, to shape the future design and delivery of the schemes, to ensure that the right solutions are delivered, in order to maximise the potential benefits, and realise the GM Growth Strategy and Piccadilly SRF. Key areas of benefit could include:

- Design of stations to fully integrate HS2, NPR, classic rail investment and other transport modes. This is particularly important in the ongoing discussions with HS2 and TfN on the preferred option for an underground NPR station at Piccadilly.
- Sequencing of all rail investments to provide maximum benefit as soon as possible, and minimise blight and disruption.
- The possibility of re-examining the current track alignment where there are issues, such as land take.
- Maximising development land around the stations.
- Investment in wider transport improvements. It is not yet clear if this could include the proposed Northern Hub schemes at Piccadilly and Oxford Road stations.
- The better consideration of wider economic benefits in subsequent business cases for high speed and other rail investment.
- Improved governance of the scheme, with more local accountability.

6.4 There are also a number of areas of uncertainty or potential risk that could impact on the delivery of HS2 and NPR in the North, on which we will need to continue to work with Government and partners to better understand and influence. These include:

- The process and outcome for the development of the High Speed North Plan and the NIC assessment. While the Terms of Reference for the plan indicate that it will be developed with the input of local leaders, we will need to ensure this is a fully collaborative process, and that there is not a long delay in this moving forward.
- Related to the point above, we may wish to consider seeking a committed timescale to taking the relevant Bills through Parliament. It is unclear from the Terms of Reference for the Integrated Rail Plan whether the Phase 2b legislation will be taken forward alongside the development of the plan, or following its publication.

- The recommendations for cost savings, design optimisation and greater private sector involvement/commercialisation in Phase 2 – we need to work to ensure that this does not have a negative impact on the quality of designs for this Phase.
- Delivery model – we need to work with partners to look at how this can improve on existing arrangements and be made as effective as possible, and that their establishment does not result in significant delays.
- How work packages are put together and delivered. In particular, we need to ensure that HS2 and NPR are not down-graded to line upgrades rather than new high speed lines. Manchester and the other Northern cities have repeatedly made clear that new high speed lines are needed, alongside additional upgrades to existing line, in order to deliver the capacity and connectivity improvements required to deliver a truly transformed rail service across the North.
- There is a recommendation in the Oakervee report that a service frequency of 14 trains per hour from Euston (with future proofing for 16) be considered, as opposed to 18 in the original design. We need to ensure that this does not have a detrimental impact on capacity to Manchester.
- The recommendation to terminate London services at Old Oak Common for a period while Euston is completed – we would want to see a firm commitment to delivering Euston as soon as possible.

## **7.0 Next Steps**

### **7.1 The anticipated next steps are as follows:**

- It is anticipated that the Government may make a full written response to the Oakervee report, although this is not confirmed.
- The implications for the city from the report and any response will be considered in full by the Council and our partners.
- We will work with Government, other parts of the North and local partners as further details become clear on the integrated High Speed North Plan and other arrangements, to ensure the best outcomes for Manchester.
- The Northern Leaders will consider how the “Connecting Britain” campaign can best respond to the announcement to make the ongoing case for the full investment to be made in the best way, and without further delay, for the North.
- The findings of the independent Review of Manchester Piccadilly Station by Richard George will be published in March and will inform further engagement with HS2 Ltd., DfT and other partners on the optimum solution for the station and onward network.

- The Integrated Rail Plan is due to be published at the end of the year.

## **8.0 Conclusions**

- 8.1 The recent announcement by the Prime Minister on HS2 and High Speed North, and the review of HS2 by Douglas Oakervee, represent a positive step in rebalancing the economy towards the North of England, and provides an opportunity to get improved solutions for the city and the overall network. The announcement is, therefore, welcomed by the Council. We will continue to work with Government and partners on the issues raised in this report, in order to both maximise the opportunities, and minimise any negative benefits from cost efficiencies and revised time frames, as the details become clearer. An update will be brought back to Members at an appropriate time.

## **9.0 Recommendations**

- 9.1 The Committee is requested to note the contents of the report and the key issues raised.

# **Manchester City Council**

## **Quarterly economy update**

**Quarter 3 2019-20**



## Contents this quarter

### [Update: 'developing a more inclusive economy'](#)

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DEVELOPING  
A MORE  
INCLUSIVE  
ECONOMY

### Update on the alignment of this document with the Council’s strategy for a more inclusive economy

This section details how we will continue to report a broad spectrum of economic data and intelligence relating to Manchester and work to place the content within context of the aims and objectives of Manchester City Council, including **Developing a More Inclusive Economy - Our Manchester Industrial Strategy**.

#### 1) *Content*

This document and the accompanying web version<sup>1</sup> have been put together to support officers and elected members to access the latest and most relevant data and intelligence concerning Manchester’s economy. We will highlight links to the **council’s strategies and aims** wherever possible. Differing frequencies of data availability means that some topics will occur annually, others quarterly.



In response to feedback, this document is intended as a **quick reference resource** and **source for discussion**; we will not include new pieces of detailed and/or extended analysis. We will, however, include links and references to more detailed content when appropriate. A timetable is included below as a guide to the availability of the main metrics. This will appear each quarter and will be regularly updated to reflect the ongoing refinement of the metrics that support the **Developing a More Inclusive Economy - Our Manchester Industrial Strategy** by going beyond traditional measures such as Gross Value Added to measures the extent of Manchester’s economic inclusivity.

#### 2) *Linking to other sources of information and analysis*

Many of the topics covered in this document will be covered in greater detail in other places - typically reports prepared for the Economy Scrutiny Committee or performance / intelligence products prepared within Manchester City Council. Where possible, we provide links and will include a short summary where it assists with the interpretation of other content within this document.



**Appendix 1** to this document contains the latest updates to data and intelligence that, whilst not immediately obvious as headline ‘economic’ measures, have been identified as metrics that supply a richer and more holistic understanding of an inclusive economy. We will continue to include such content as new content becomes available.

<sup>1</sup> <https://sites.google.com/manchester.gov.uk/economy-dashboard/home>



**3) Aligning metrics to the pillars of the Our Manchester Industrial Strategy**



Production of a quarterly update on the topic of Manchester’s economy including alignment to the council’s strategies is an evolving undertaking. The availability of data means that the content will change over time. We will ensure that this process of change is clearly signposted and will utilise the online counterpoint to this document to maintain the availability of data to support the work of officers and elected members

The following table outlines the current cycle of measures which are reported in the Economy Dashboard, aligned broadly to the three pillars of the Our Manchester Industrial

Strategy although inevitably there is some overlap as these areas are interlinked.

**Measuring the impact of an Inclusive Economy on Health and Wellbeing.**

The *Our Manchester Industrial Strategy* includes a commitment to develop a basket of indicators that go beyond economic prosperity and consider the health of the workforce, the impact of economic growth on the overall wellbeing of Manchester residents, and the extent to which people are reaching their full potential at all life stages.

Discussion is ongoing as to how best to incorporate relevant health and wellbeing measures into the Economy Dashboard with particular focus on those which demonstrate the extent of health inequalities connected to economic factors and the extent to which the gap is changing. Some suggested measures are outlined below:

**Measuring a more inclusive economy: people**

| Broad category | Data item                              | Source                               | Detail  | Frequency | Lowest geo level available | When available |
|----------------|--|--------------------------------------|---|-----------|----------------------------|----------------|
| Skills         | Annual Population Survey               | Office for National Statistics (ONS) | Workplace based training<br>Resident NVQ equivalent skills<br>Work status of those with disabilities<br>Work status of those with long term illness | Annual    | City wide                  | Nov            |
|                | Full academic year apprenticeship data | Department for Education (DfE)       | Apprenticeship starts and achievements by learner demographic and course of study characteristics   | Annual    | City wide                  | Jun            |

| Broad category  | Data item  | Source                                 | Detail  | Frequency | Lowest geo level available | When available               |
|---|--|--|---|-----------|----------------------------|------------------------------|
| <b>'Marmot' indicators of health, health outcomes and social inequality</b> | Life expectancy data                                       | ONS                                    | Life expectancy and inequality in life expectancy at birth                            | Annual    | City wide                  | Dec <sup>2</sup>             |
|   | NEET and participation data                                | DfE                                    | 19-24 year olds not in education, employment or training data                         | Annual    | City wide                  | June                         |
|   | Metrics of individual poverty and disadvantage             | Department for Work and Pensions (DWP) | Long term benefits claimants  | Quarterly | City wide                  |                              |
|   |  | Joseph Rowntree Foundation             | Minimum income standard   | Annual    | City wide                  | Summer                       |
|   |  | Money Advice Service                   | Over indebtedness   | Annual    | City wide                  | To be confirmed <sup>3</sup> |
|   |  | DWP                                    | BEIS fuel poverty   | Annual    | City wide                  | June                         |
|   |  | Health and Safety Executive            | Work related illness  | Annual    | Regional                   |                              |
|   | Annual population survey - personal and economic wellbeing | ONS                                    | Survey of people with low satisfaction / worthwhile / happiness + high anxiety scores | Annual    | City wide                  | October <sup>2</sup>         |

## Measuring a more inclusive economy: place

| Category                           | Data item                          | Source            | Detail  | Frequency | Lowest geo level available  | When available |
|------------------------------------|------------------------------------|-------------------|---|-----------|-----------------------------|----------------|
| <b>Economy and the environment</b> | Monitor of the natural environment | Natural England   | Number and duration of visits   | Annual    | City wide                   | Sept           |
| <b>Growth</b>                      | Crane survey                       | CBRE <sup>4</sup> | Annual survey of residential, office, academic and retail construction projects | Annual    | Covers extended city centre | Spring         |

<sup>2</sup> Latest data appears in appendix 1

<sup>3</sup> The Money Advice Service are to [review](#) their metrics so revised or alternative data sources may become available

<sup>4</sup> This is a commercial product for internal use and as such should not be published in future publicly available reports

| Category                      | Data item                          | Source | Detail   | Frequency | Lowest geo level available     | When available |
|-------------------------------|------------------------------------|--------|--|-----------|--------------------------------|----------------|
| <b>Growth</b>                 | Hotel pipeline                     | MCC    | Quarterly update on hotel rooms under construction | Quarterly | Covers city centre and airport |                |
| <b>Digital infrastructure</b> | Broadband and telecoms data        | Ofcom  | Broadband speed and availability vs take-up        | Annual    | City wide                      | Tbc            |
| <b>Carbon reduction</b>       | Choice of metrics under discussion |        |  |           |                                |                |
| <b>Transportation</b>         | Choice of metrics under discussion |        |  |           |                                |                |

## Measuring a more inclusive economy: prosperity

| Category                 | Data item                               | Source | Detail   | Frequency | Lowest geo level available | When available   |
|--------------------------|---|--------|--|-----------|----------------------------|------------------|
| <b>Earnings</b>          | Annual Survey of Hours and Earnings     | ONS    | Resident and worker wages, Real Living wage data                                   | Annual    | City wide                  | Oct              |
| <b>Employment</b>        | Inter-departmental business register    | ONS    | Business counts by industrial sector / public / private status / employee count    | Annual    | City wide                  | Oct              |
|                          | Annual Population Survey                | ONS    | Volume of self-employed and employed workers<br>Volume of non-permanent workers    | Annual    | City wide                  | Apr              |
|                          | Business register and employment survey | ONS    | Total in employment by industrial sector   | Annual    | City wide                  | Sept             |
| <b>Economic activity</b> | Gross value added data                  | ONS    | Gross Value Added (nominal current price data, balanced approach, per hour worked) | Annual    | City wide                  | Feb <sup>5</sup> |

<sup>5</sup> The release by ONS of 2018 data scheduled for February 2020 has been delayed but will be featured in the next quarterly update

| <b>Category</b> | <b>Data item</b>               | <b>Source</b> | <b>Detail</b>  | <b>Frequency</b> | <b>Lowest geo level available</b> | <b>When available</b>       |
|-----------------|--------------------------------|---------------|--|------------------|-----------------------------------|-----------------------------|
| <b>Growth</b>   | Business and employment growth | ONS           | Using data from the Business Register and Employment Survey, Annual Population Survey and IDBR Business Counts to measure growth sectors | Annual           | City wide                         | As per constituent elements |
|                 | Procurement spend              | MCC           | Annual update on MCC expenditure with local suppliers  | Annual           | City wide                         | Autumn / winter             |

**Skills**

*As a thriving and sustainable city, we will upskill the city's workforce to ensure that Mancunians can benefit from the new jobs created here, including more and higher level apprenticeships*

**Measuring a more inclusive economy**  
**Prosperity**

## Real living wage - 2019 update

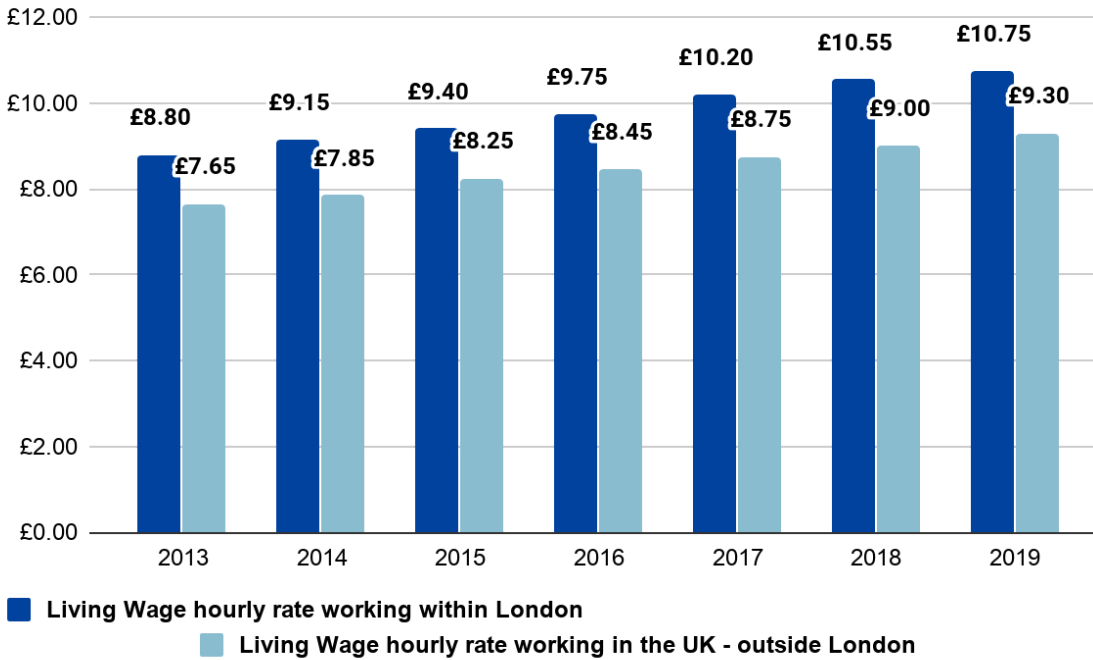
Data source: Living Wage Foundation / Office for National Statistics / MCC internal analysis

### What is the real living wage?



The Real Living Wage is calculated on an annual basis by the Living Wage Foundation<sup>6</sup>. The real Living Wage is based on the cost of living and is currently voluntarily paid by nearly 6,000 UK employers including Manchester City Council<sup>7</sup>. The real living wage should not be confused with the minimum wage<sup>8</sup> and the national living wage<sup>9</sup>, both of which are legal requirements of employers.

Figure 1 : real living wage, time series 2013 - 2019



**Figure 1** above shows the living wage figures set for London workers and those outside London for each year 2013 to 2019. Manchester workers in receipt of the living wage will be paid at least **£9.30** per hour, which equates to **£372.00** for a 40-hour week or **£19,397** per year (both figures are before tax and national insurance deductions).

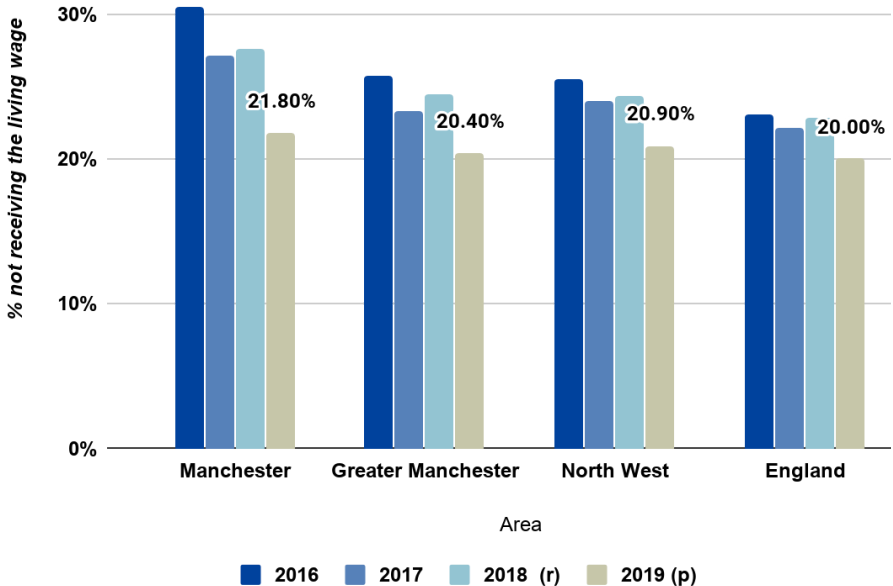
<sup>6</sup> <https://www.livingwage.org.uk/>

<sup>7</sup> [https://secure.manchester.gov.uk/news/article/8183/manchester\\_sets\\_out\\_ambition\\_to\\_be\\_an\\_accredited\\_national\\_living\\_wage\\_employer](https://secure.manchester.gov.uk/news/article/8183/manchester_sets_out_ambition_to_be_an_accredited_national_living_wage_employer)

<sup>8</sup> The minimum wage is currently £7.70 per hour and applies to workers under 25 years of age

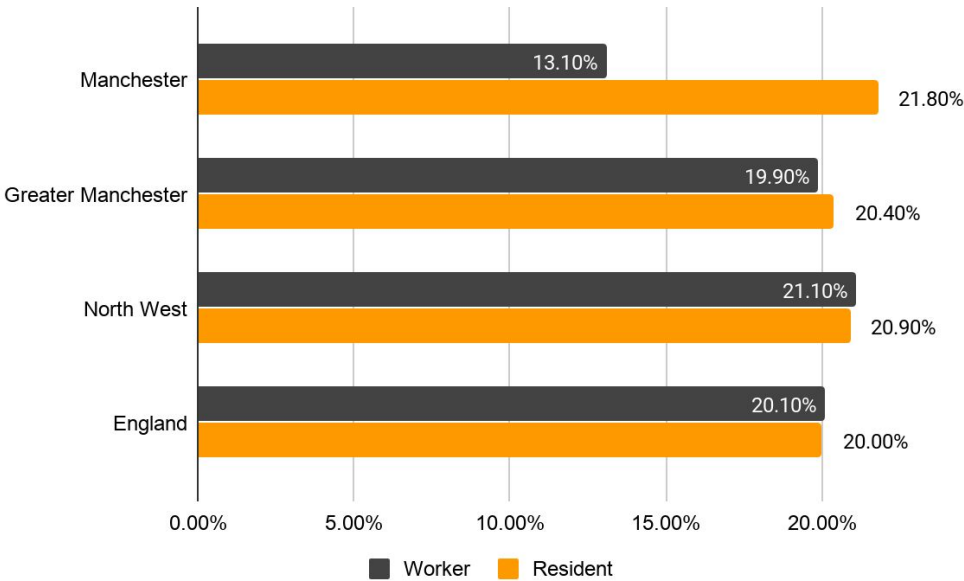
<sup>9</sup> The national living wage is currently £8.21 per hour and applies to workers aged over 25

### What percentage of employees do not receive the real living wage?



As employers are not obliged to pay the real living wage the rate of employees in receipt is a useful metric of income<sup>10</sup>. **Figure 2** (left) shows change over time and covers individuals who live in Manchester, a margin of error of +/- 2.3% is applicable to the Manchester resident figure.

**Figure 2: % of resident workers not receiving the real living wage**  
(r) denotes revised 2018 figure (p) denotes provisional 2019 figure



Data is also available covering individuals who work in Manchester, **figure 3** provides detail for 2019 of the different proportion of workers who do not receive the real living wage. A margin of error of +/- 1.3% applies to the Manchester worker figure.

**Figure 3: % of resident and workers not receiving the real living wage (provisional figure for 2019)**

<sup>10</sup> ASHE analysis is based on the Real Living Wage rates available from the preceding year of the survey, therefore the 2019 statistics shown above are based on the living wage rate in 2018 (£9). This is because the Living Wage rate is set in November each year but employers are generally allowed until May the following year to implement the rises.

### Living hours

The Living Wage Foundation has also developed a new **Living hours** standard that sets out what basic principles on an approach to the guarantee and stability of hours worked for employees that compliments their work on the living wage. In the same manner as the living wage employers can gain accreditation for offering *Living hours*.

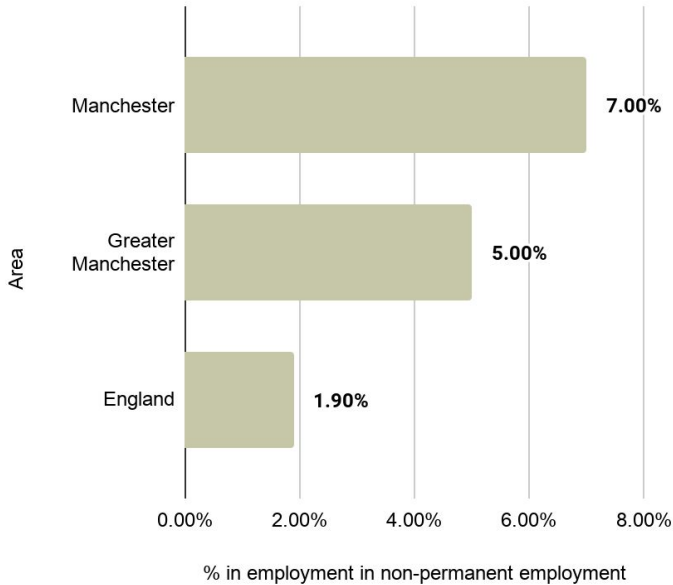
The Living Hours standard calls on employers to provide the right to:

- (i) Notice periods for shifts: of at least 4 weeks' notice, with guaranteed payment if shifts are cancelled within this notice period.
- (ii) A right to a contract with living hours: the right to a contract that reflects accurate hours worked, and a guaranteed minimum of 16 hours a week (*unless the worker requests otherwise*)

This campaign is currently at an early stage with the Living Wage Foundation working with a number of employers to implement the proposals and to develop roll out accreditation.

As shown in **figure 4** (above right) data from the **ONS Annual Population Survey**<sup>11</sup> suggests that Manchester has a higher proportion of the workforce who are in non-permanent employment than both Greater Manchester and the England<sup>12</sup>.

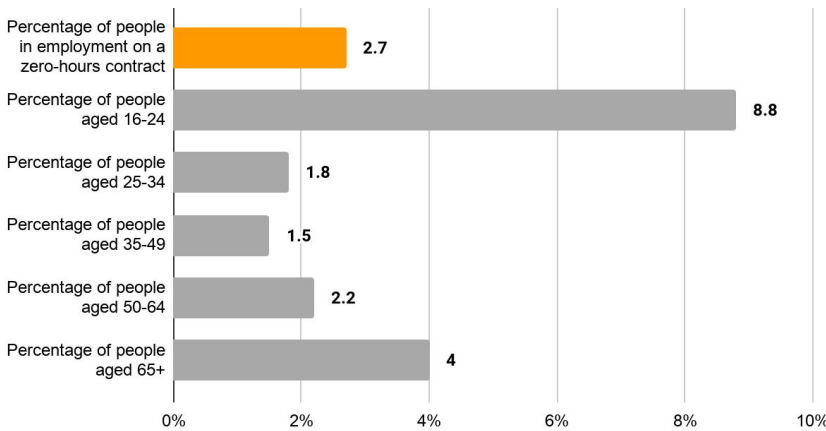
The companion Labour Force Survey covers zero hours contracts, although this is not currently available to local authority level. **Figure 5** below summarises U.K workers aged 16-24 and 65+ are more likely to be on this type of contract.



**Figure 4: of those in employment percentage in non permanent employment**

<sup>11</sup> <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/methodologies/annualpopulationsurveyapsqmi>

<sup>12</sup> The survey suggests 7% of those in employment which equates to 18,800 workers

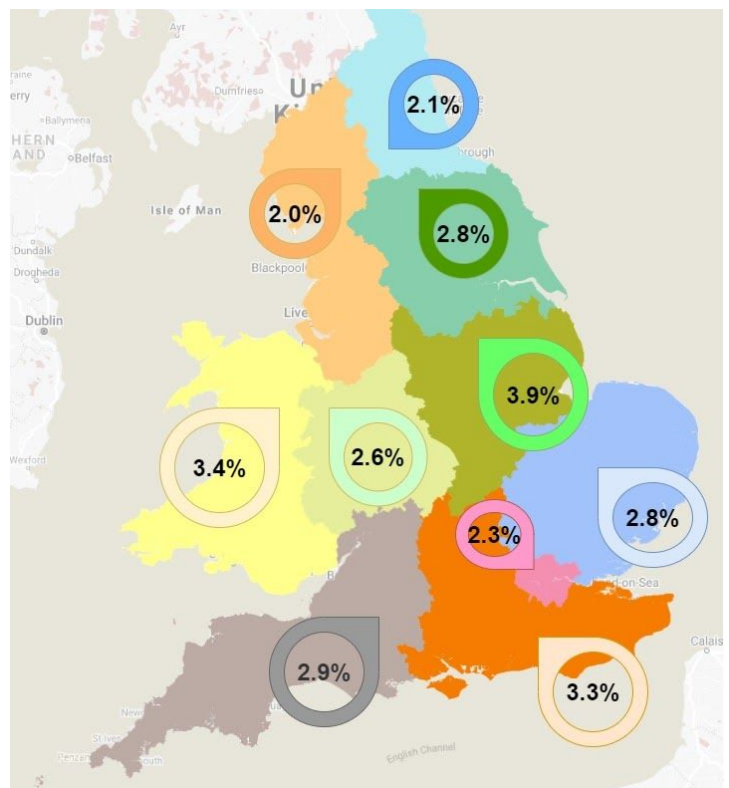


**Figure 5: % of workers on zero hours contracts in the United Kingdom by age banding**

There is also variation in the extent of zero hours contracts when gender is considered, nationally currently 2.4% of men in employment are on this type of contract, compared with 3.1% of women

Whilst no local authority level data is currently available regional data suggests that the North West of England has a lower proportion of workers on zero hours contracts than elsewhere in England and Wales.

Figure 6 (right) compiles the 2019 estimates for England and Wales



**Figure 6: regional variation in % on zero hours contracts, (no gender or age split)**



# Apprenticeship data

Data source: Department for Education

Measuring  
a more  
inclusive  
economy

People

## Apprenticeship starts

The quarter 1 2018/19 economy update (available [here](#)<sup>13</sup>) featured an in-depth look at the characteristics of apprenticeships undertaken by Manchester residents and the key content of that section is now updated with the data for the most recent full academic year.

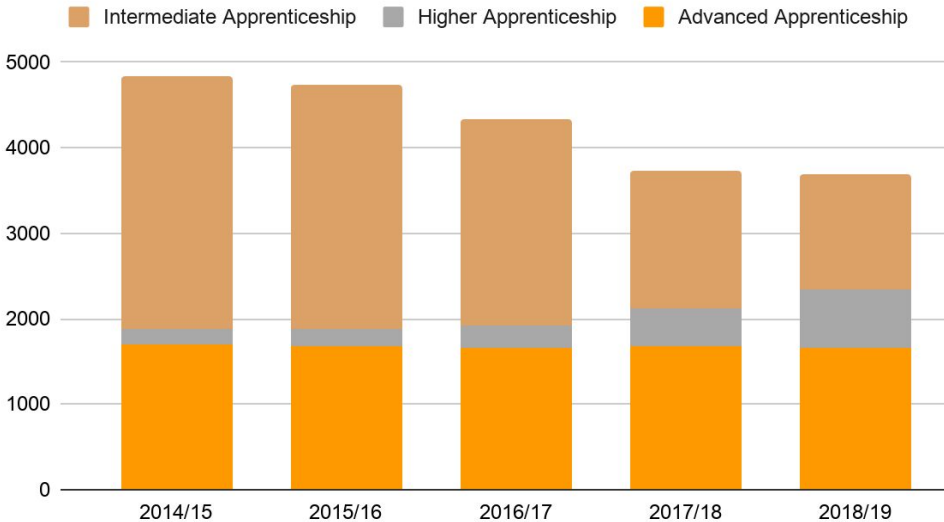


Figure 7 shows the trend towards an increase in higher and advanced apprenticeships and a corresponding decline in the number of intermediate apprenticeships.

Figure 7: Manchester apprenticeship starts by level and academic year

A range of factors accounts for these changes, including (but not limited to) streamlining of courses at intermediate level, preference for education as a setting over apprenticeship for under 19s and strong take-up for apprenticeships by companies to upskill their existing older staff.

Apprenticeship starts are reported by **age group** - under 19, 19-24 and 25+. The largest of these groups in 2018/19 was those aged over 25, which along with those aged 19-24 both saw a small increase in numbers when contrasted against 2017/18. The number of starts for those under 19 fell over the same period.

For the 2018/19 academic year Manchester saw a 57% / 43% **split between female and male apprenticeship starts** which compares to a 50.2% / 49.8% split across England. A similar disparity was seen in the starts for the 2017/18 academic year.

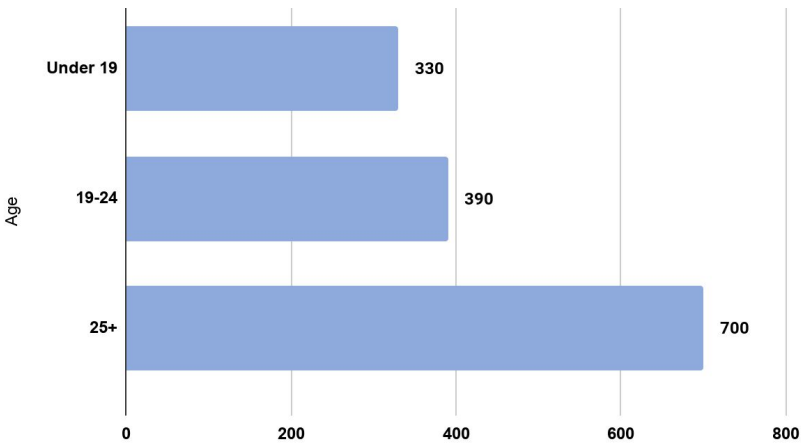
An aspect of the data collected on apprenticeship starts is the self-declared **learning difficulty or disability**. Manchester during the 2018/19 academic year saw 400 apprentices in this

<sup>13</sup> Internal MCC link only

category, 11% of the total starters for the year. This mirrors the figure for England where 12% of the total starts for the year declared a learning difficulty or disability.

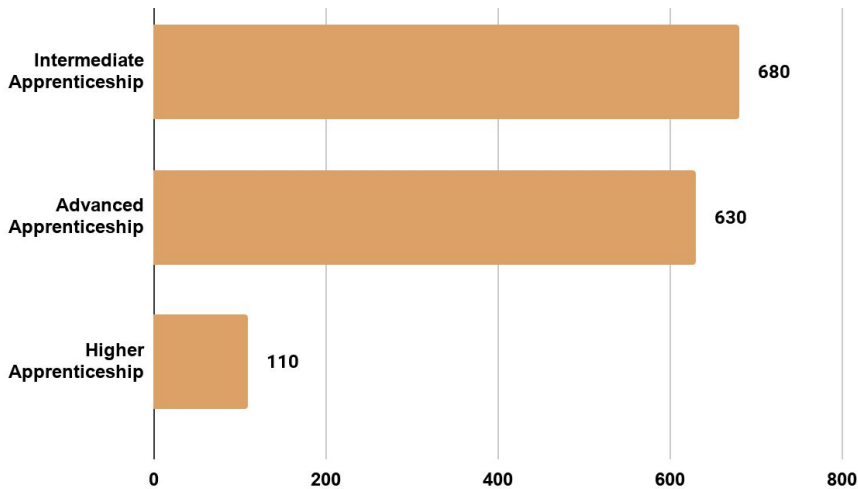
The three most popular **subject areas** for apprenticeship starts, in order, are Health, public services and care (35% of all starts, all ages), business, administration and law (32% of all starts, all ages) and retail and commercial enterprise (14% of all starts, all ages). The same subject area preference is seen across the three age groups mentioned above although those apprentices under 19 years of age show a higher proportion opting for retail and commercial enterprise (19%).

### Apprenticeship achievements



**Figure 8** (left) shows the number of apprenticeship achievements in 2018/19, by the age of the apprentice. The distribution by age mirrors the distribution in apprenticeship starts.

**Figure 8: Number of apprenticeship achievements by age band**



**Figure 9** shows the distribution in 2018/19 academic years by apprenticeship level. The volume of intermediate apprenticeship achievements reflects the completion of study at this level that was commenced some years ago and future years are likely to see a reflection of the move towards a greater number of higher level apprenticeships described earlier.

**Figure 9: Number of apprenticeship achievements by apprenticeship level**

# Digital infrastructure

*As a Liveable and Low Carbon City we will harness the potential of technology to improve the city's liveability, sustainability and connectivity*

Measuring a more inclusive economy  
*Place*

## Fixed broadband availability and take-up

Data source: Ofcom, Connected Nations 2019

Ofcom have released a 2019 update to their annual 'Connected Nations'<sup>14</sup> report on the availability and take-up of broadband within local authority areas across the United Kingdom. Figure 10 below shows the range of fixed broadband *availability* for the English Core Cities categorised by those premises that **cannot** receive data at a rate of 30 mbit/s, those that **can** receive 'superfast' data (30-299 mbit/s) and those that **can** receive 'ultrafast' data (300 mbit/s+).

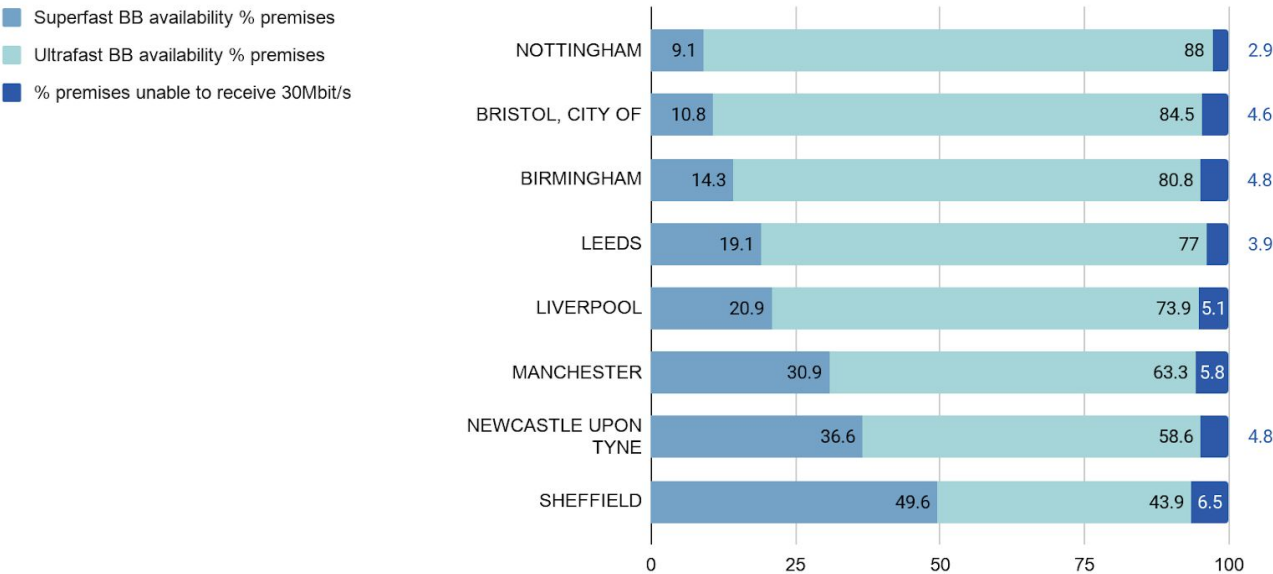
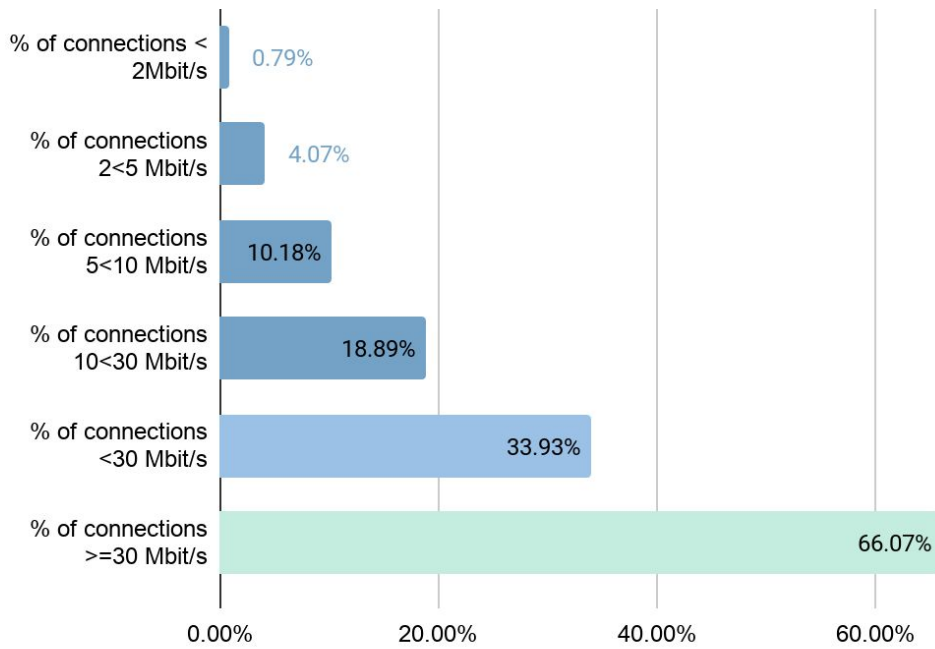


Figure 10 : Broadband speed availability 2019, English Core Cities

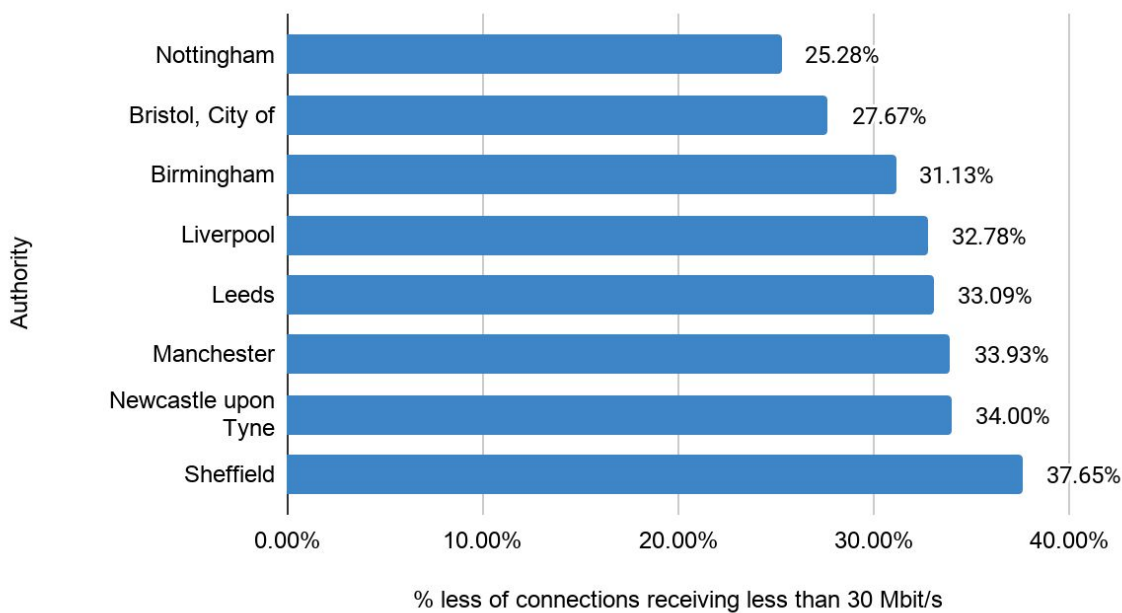
At first glance the **figure 10** suggests that levels of broadband availability in Manchester are high - this, however, masks the levels of broadband *take-up* in the city. Broadband is a commercial product and consumers have a choice in the provision they opt for. Broadly speaking faster broadband will cost more and the prices for the highest speeds, most likely delivered via fibre optic cable will be the highest in the marketplace. **Figure 11** (overleaf) shows 33.93% of connections in the city have speeds at less than the level described as 'superfast' 30 Mbit/s.

<sup>14</sup> <https://www.ofcom.org.uk/research-and-data/multi-sector-research/digital-infrastructure-research/connected-nations-2019>



**Figure 11: take-up of lines by maximum speed**

A similar disparity is seen in the other English Core Cities where availability of fast broadband exceeds levels of take up. Sheffield has the highest rate of connections less than 30 Mbit/s - 37.65% of all connections, Nottingham the lowest of the core cities - 25.28%. **Figure 12** (below) shows the data for the English Core Cities.



**Figure 12: English Core Cities - % of broadband connections receiving speeds of less than 30 Mbit/s**

## Development

*As a thriving and sustainable city, we will support the growth of established and emerging business sectors*

**Measuring  
a more  
inclusive  
economy**

**Prosperity**

## Business Rates

Data source: MCC internal analysis

### Net annual charges payable at snapshot date

| Business type               | This quarter     | Previous quarter snapshot (Oct 19) |                 |               | Previous year snapshot (Jan 19) |                |              |
|-----------------------------|------------------|------------------------------------|-----------------|---------------|---------------------------------|----------------|--------------|
|                             | Jan/20           | Value                              | Variation £     | Variation %   | Value                           | Variation £    | Variation %  |
| Office                      | £118.11 m        | £119.22 m                          | -£1.11 m        | -0.93%        | £110.9 m                        | £7.22 m        | 6.51%        |
| Retail                      | £78.21 m         | £79.63 m                           | -£1.42 m        | -1.79%        | £81.18 m                        | -£2.97 m       | -3.66%       |
| Health & Public Services    | £42.68 m         | £43.43 m                           | -£0.75 m        | -1.72%        | £43.21 m                        | -£0.53 m       | -1.22%       |
| Industrial                  | £34.65 m         | £35.14 m                           | -£0.50 m        | -1.42%        | £34.96 m                        | -£0.31 m       | -0.90%       |
| Services & Food             | £21.6 m          | £22.04 m                           | -£0.43 m        | -1.97%        | £20.92 m                        | £0.68 m        | 3.24%        |
| Sports, Rec & Culture       | £24.86 m         | £25.1 m                            | -£0.23 m        | -0.93%        | £24.08 m                        | £0.79 m        | 3.26%        |
| Hotels                      | £19.75 m         | £19.84 m                           | -£0.09 m        | -0.45%        | £18.51 m                        | £1.24 m        | 6.67%        |
| Car Park                    | £14.19 m         | £14.23 m                           | -£0.04 m        | -0.27%        | £13.41 m                        | £0.78 m        | 5.83%        |
| Education                   | £8.7 m           | £9.08 m                            | -£0.38 m        | -4.23%        | £8.97 m                         | -£0.28 m       | -3.10%       |
| Advertising & Communication | £5.46 m          | £5.53 m                            | -£0.07 m        | -1.35%        | £4.85 m                         | £0.61 m        | 12.56%       |
| <b>Total</b>                | <b>£368.21 m</b> | <b>£373.24 m</b>                   | <b>-£5.03 m</b> | <b>-1.37%</b> | <b>£361. m</b>                  | <b>£7.22 m</b> | <b>1.96%</b> |

Over the preceding dashboards we have tracked the 'Retail' category which was identified as showing a decrease in business rates contrasted with the snapshot taken a year previously<sup>15</sup>. This quarter has seen the continuation of this trend. Caution should be exercised in drawing conclusions from individual quarterly snapshots but we will continue to monitor variation over the coming year and will return to the topic if necessary.

<sup>15</sup> These figures represent the financial amount billed by Manchester City Council, not the financial amount of business rates collected. The data is taken as a snapshot as at the first day of the month after quarter end. The most recent business rates revaluation occurred on 1st April 2017.

The data shown in the table above shows the total net annual charges payable for all business rate accounts live as at a snapshot date. Net charge is the amount due after reliefs and discounts (for example, small business rate relief, charitable relief, empty property relief). The figures quoted above are not adjusted to reflect bad debts or appeals to avoid distortion to the profile of the business types with rates payable.

The table below shows the variation in the *number* of business properties that make up the rates due shown above. In contrast to the decline in value the retail sector shows a modest increase over the past two annual snapshots.

| Number of properties - one and two years previous |               |               |               |
|---|---------------|---------------|---------------|
| Business type                                     | Jan/20        | One year ago  | Two years ago |
| Office  | 8,381         | 8,004         | 7,854         |
| Retail  | 5,118         | 5,102         | 5,081         |
| Health & Public Services                          | 621           | 635           | 626           |
| Industrial  | 5,054         | 4,971         | 4,831         |
| Services & Food                                   | 1,418         | 1,375         | 1,326         |
| Sports, Rec & Culture                             | 904           | 899           | 899           |
| Hotels  | 98            | 95            | 92            |
| Car Park  | 3,483         | 3,461         | 3,323         |
| Education   | 383           | 379           | 377           |
| Advertising & Communication                       | 1,559         | 1,589         | 1,621         |
| <b>Total</b>                                      | <b>27,019</b> | <b>26,510</b> | <b>26,030</b> |

# Housing

*As a liveable and low carbon city: we will provide a diverse supply of good quality housing in clean, safe, more attractive and cohesive neighbourhoods across the city.*

**Measuring a more inclusive economy**  
*Place*

## Housing market data

Data source: MCC analysis

| Property prices and sales during the quarter (derived from Land Registry data) |                                  |              |                             |                           |
|--|----------------------------------|--------------|-----------------------------|---------------------------|
|  |                                  |              | Variation from last quarter | Variation from a year ago |
|  |                                  | 2019/20 Qtr2 | Number                      | Number                    |
| Number of properties registered as sold  | Manchester city centre           | 704          | -21                         | -59                       |
|  | Manchester excluding city centre | 1,844        | -131                        | -116                      |
| Mean Price   | Manchester city centre           | £208,690     | £1,986                      | £1,813                    |
|  | Manchester excluding city centre | £200,458     | £121                        | £3,036                    |

\*Data availability dictates that sales data is reported one quarter in arrears.

2019/20 figures show that 550 **affordable homes**<sup>16</sup> are expected to be built across Manchester.

During the 2018/19 financial year 49% of home sales to owner occupiers in Manchester were classed as affordable<sup>17</sup>. For the same period 39% of home sales to owner occupiers within two miles of the city centre were classed as affordable.

<sup>16</sup> Source MCC internal residential development tracker

<sup>17</sup> Manchester definition classifies a property sale as affordable where housing costs are less than 30% of average household income (£27k)

# Rental market data

## Average rental prices for 2 bedroom properties - quarterly time series

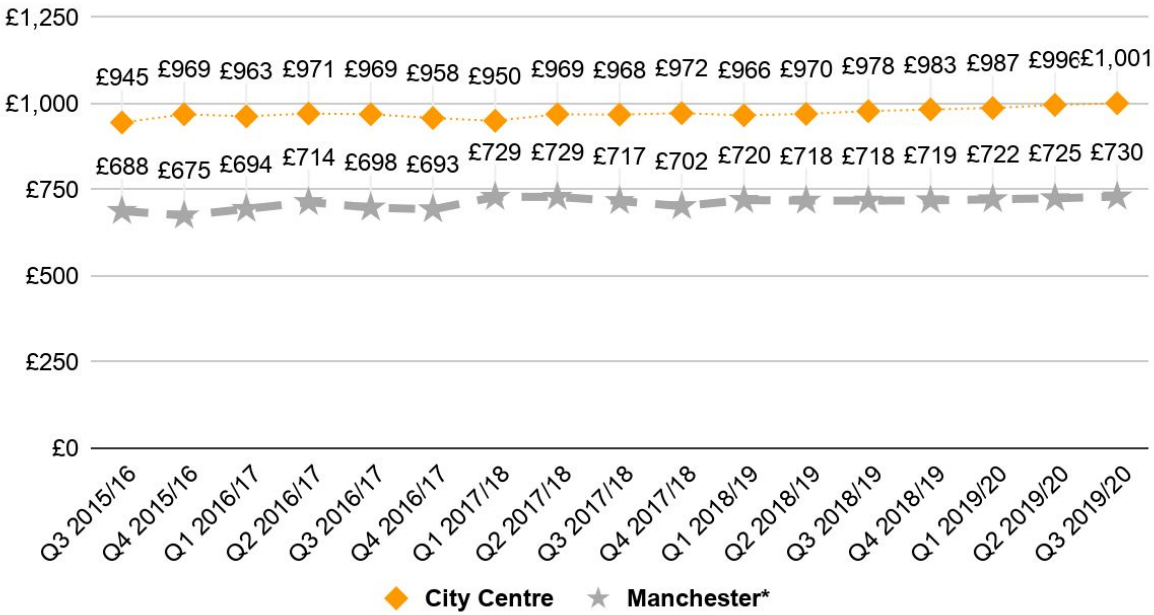


Figure 13: average rental prices for 2 bedroom properties, quarterly time series

Rental price data is retrospectively amended to incorporate the latest available intelligence. Previous quarters may not match figures in preceding dashboards. \*Manchester refers to the City of Manchester not Greater Manchester

## Volume of long term<sup>18</sup> empty properties

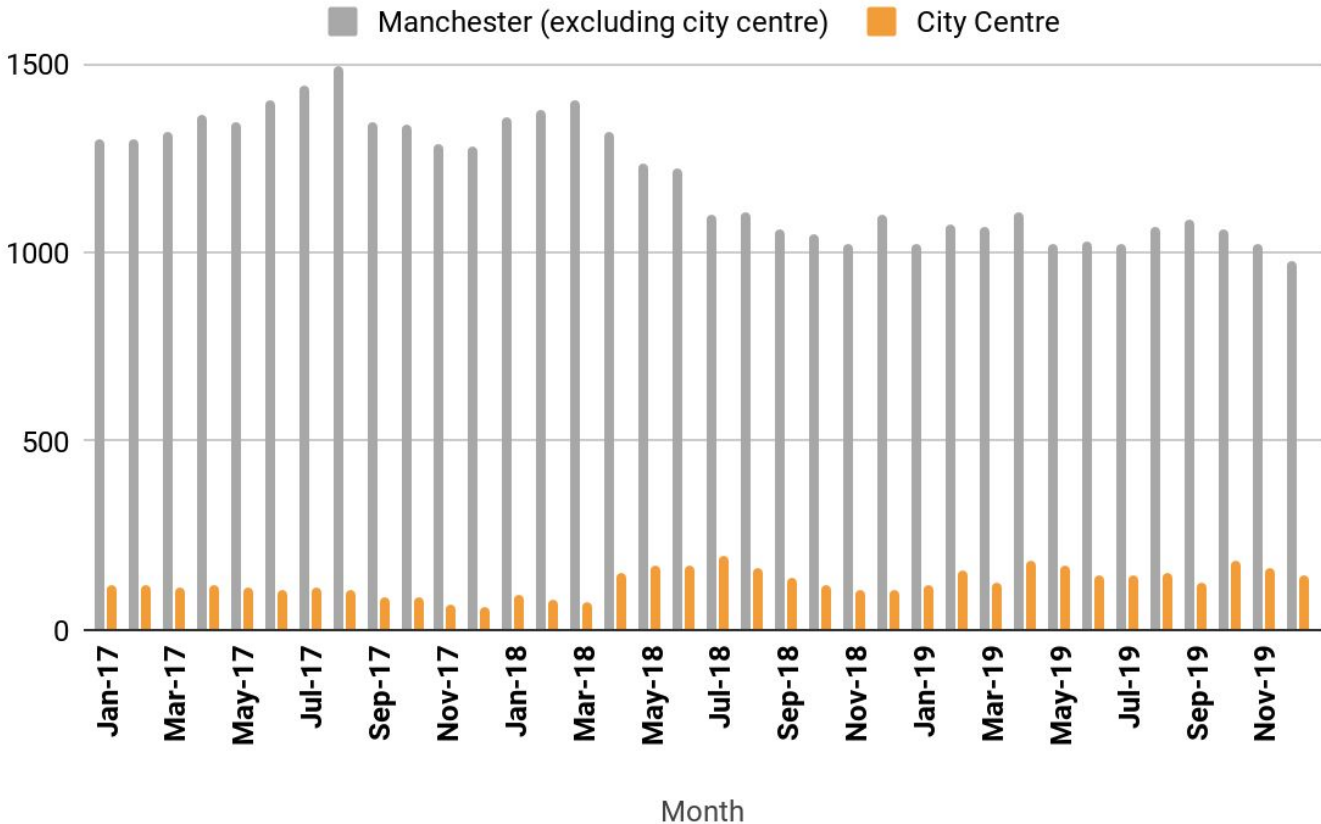


Figure 14: Long term empty properties, quarterly time series

<sup>18</sup> Refers to properties vacant for more than six months Page 104



**Figure 14** (preceding page) shows the number of empty properties and is updated monthly as per the period covered by this dashboard. The chart displays the number of empty properties in the city centre and across Manchester. The second figure **excludes** those empty properties in the city centre.

| Month         | Manchester (excluding city centre) | City centre |
|---------------|------------------------------------|-------------|
| Jan-19        | 1026                               | 121         |
| Feb-19        | 1075                               | 158         |
| Mar-19        | 1068                               | 123         |
| Apr-19        | 1108                               | 185         |
| May-19        | 1024                               | 173         |
| Jun-19        | 1032                               | 146         |
| Jul-19        | 1,023                              | 145         |
| Aug-19        | 1,067                              | 152         |
| Sep-19        | 1,086                              | 126         |
| Oct-19        | 1,061                              | 183         |
| Nov-19        | 1,021                              | 164         |
| <b>Dec-19</b> | <b>981</b>                         | <b>145</b>  |

The table above contains the number of empty properties, by month, in 2019 for both the city centre and the remainder of the City of Manchester.

# Visitor economy

*As a liveable and low carbon city: we will invest in cultural and sports facilities for the benefit of the city's residents and to improve the city's international attractiveness*

Measuring a more inclusive economy  
**Prosperity**

## The economic impact of tourism

Data source: Visit Manchester

The annual tourism economic activity monitor data prepared by Visit Manchester is available in summary form here<sup>19</sup>.

We have included two tables detailing the economic impact of tourism to the city of Manchester (**figure 15**) - and the number of jobs supported by tourism (**figure 16**) for reference and context alongside the other *visitor economy* measures in this report.

The most recent figures (2018) are £4.86 billion and 53,400 jobs respectively.

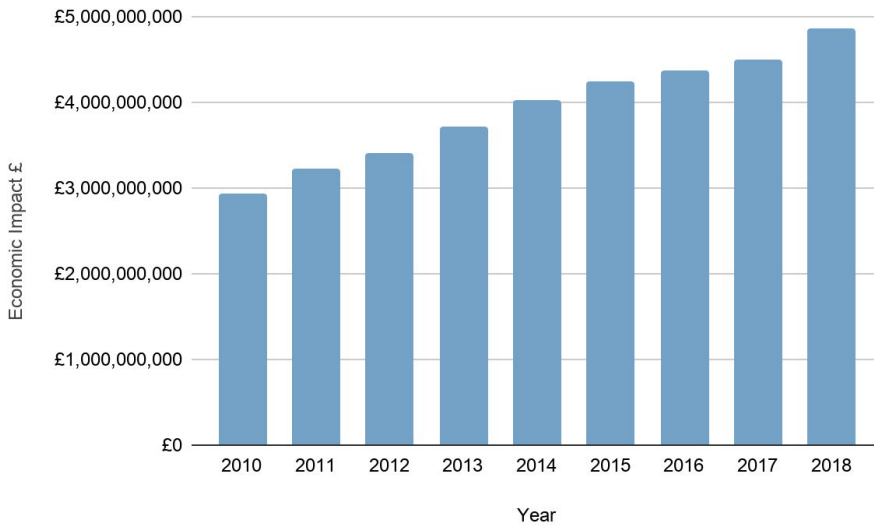


Figure 15: Economic impact of tourism, annual time series

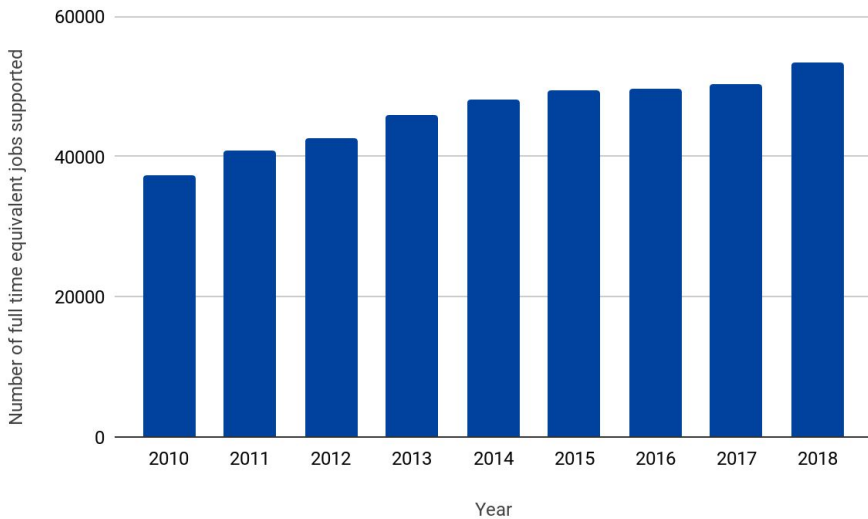


Figure 16: Number of jobs supported by tourism, annual time series

<sup>19</sup> <https://democracy.manchester.gov.uk/documents/s1009518/1009518-20Economy%20Activity.pdf>

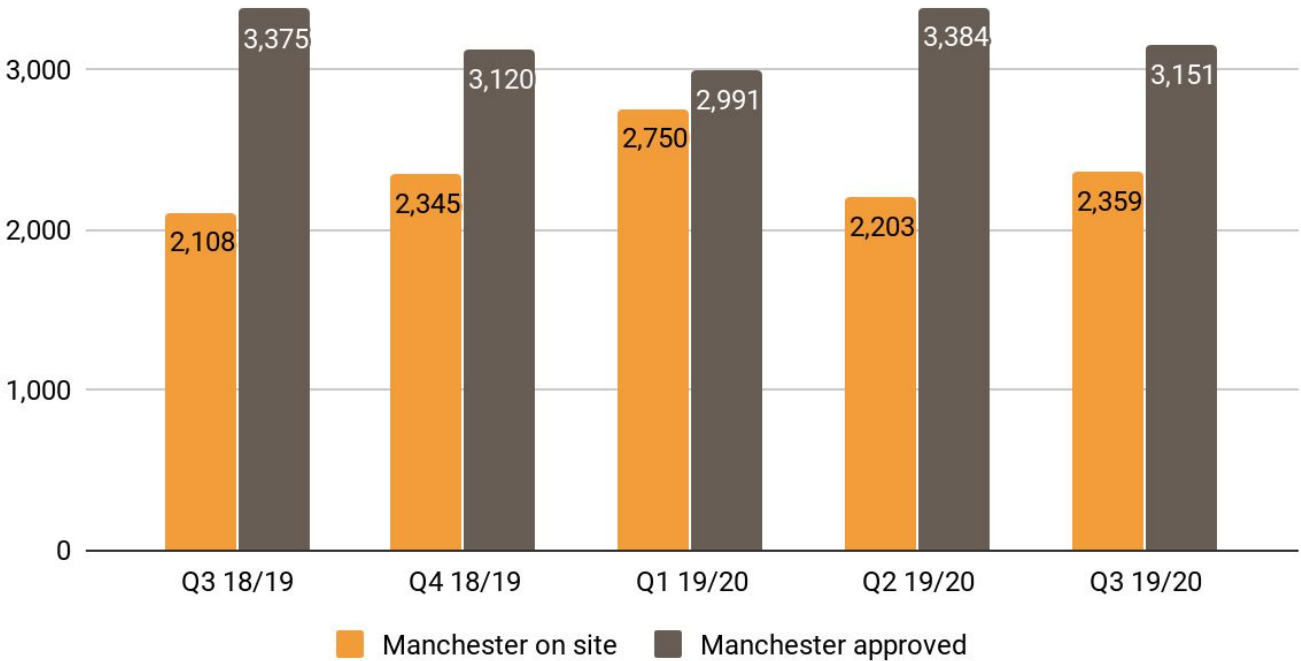
# Hotel pipeline

Data source: MCC internal analysis

This is a new data item within the economy update - we have previously (and will continue to) include Visit Manchester quarterly data on the number of hotel rooms, by star rating, in Manchester. This hotel pipeline data provides additional detail on the expansion of the sector and should be viewed as supplementary to the hotel room data set. The latest update to the number of hotel room data is shown below for information.

| Number of rooms in Manchester city centre (snapshot at month end) | Aug/19       |
|---|--------------|
| 4 & 5 star hotels   | 5219         |
| 3 star and below hotels   | 4171         |
| Self-catering and serviced apartments                             | 1055         |
| <b>Total rooms</b>  | <b>10445</b> |

**Figure 18** below shows the number of hotel rooms in Manchester city centre and at Manchester airport (i) that have had planning permission approved and (ii) those that are currently 'on site' - that is those under construction. The number of rooms on site is the best metric of the volume of hotel development although the quarterly snapshots are not exclusive - a room may appear in subsequent snapshots until the hotel itself is complete. We include the figure for rooms approved as this gives early indication of future development trends, although the path from approval to completion is not always guaranteed.



**Figure 18: Number of hotel rooms approved / number of hotel rooms on site, quarterly time series**

**Visitor economy**

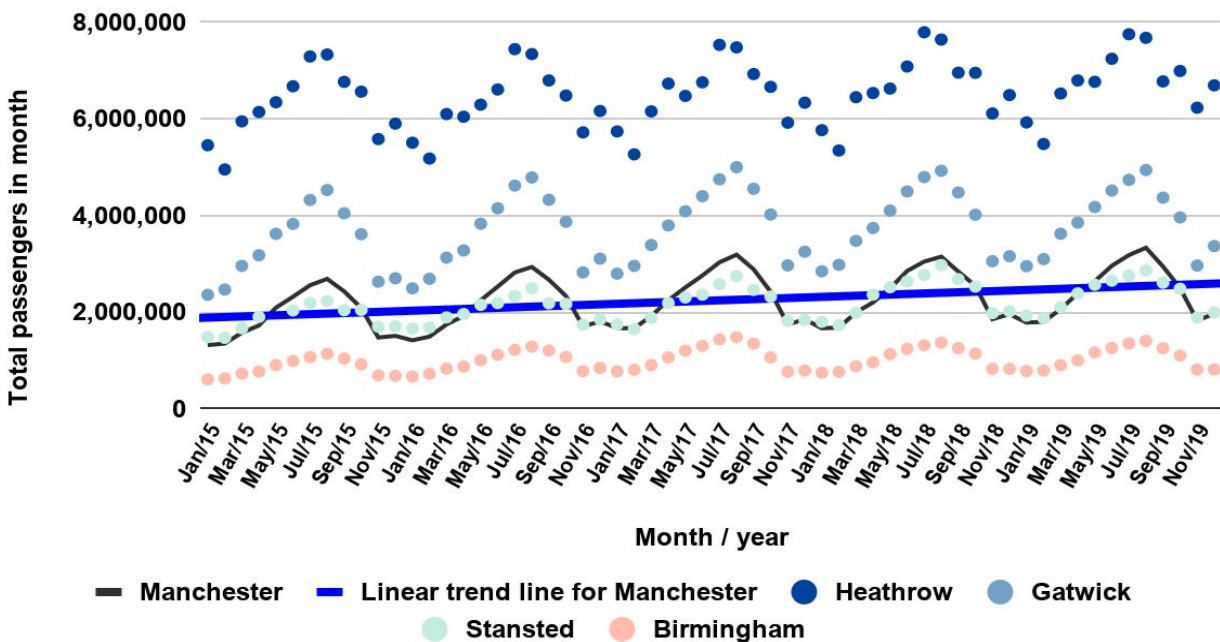
*As a Connected City we will capitalise on the increased capacity at the airport and the connectivity and logistics benefits of Airport City to boost the economy*

**Measuring a more inclusive economy**  
*Prosperity*

**Manchester Airport data**  
Data source: Civil Aviation Authority

Figure 19: Number of passengers major UK airports, monthly time series

Major UK airports - passenger numbers by month, rolling five years time series



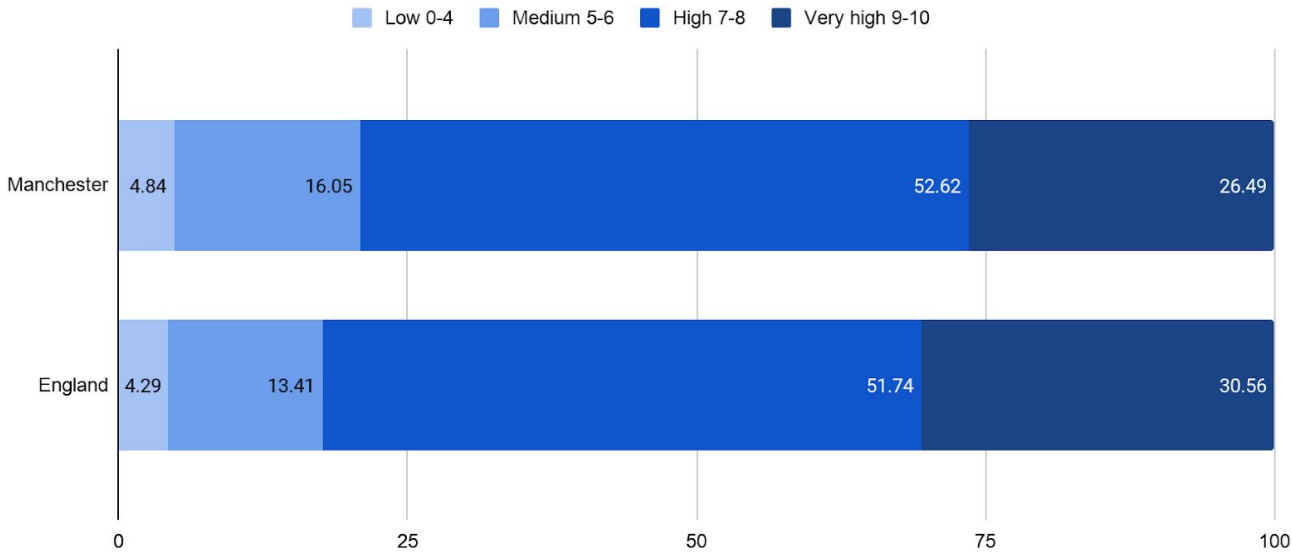
|                   | Passenger numbers during month: | Annual change |        | Biennial change |       |
|-------------------|---------------------------------|---------------|--------|-----------------|-------|
|                   | December 2019                   | Actual        | %      | Actual          | %     |
| <b>Manchester</b> | 1,968,052                       | 10,263        | 0.52%  | 116,512         | 6.29% |
| <b>Heathrow</b>   | 6,696,079                       | 199,915       | 3.08%  | 358,053         | 5.65% |
| <b>Gatwick</b>    | 3,368,967                       | 210,464       | 6.66%  | 116,782         | 3.59% |
| <b>Stansted</b>   | 1,995,287                       | -24,535       | -1.21% | 157,818         | 8.59% |
| <b>Birmingham</b> | 814,379                         | -11,375       | -1.38% | 23,227          | 2.94% |

December 2019 saw a small increase (0.52%) in passengers using Manchester airport when compared with the preceding year. Heathrow and Gatwick both recorded a larger percentage increase, Stansted and Birmingham both saw lower passenger numbers than in the preceding year. **Note: Thomas Cook** ceased trading on 23rd September 2019 so any reduction in passengers would start to show from this quarter onwards. It is difficult to identify any impact as this quarter sees a seasonal decrease, we will continue to monitor the data as any impact may start to become apparent as the holiday season restarts in 2020.

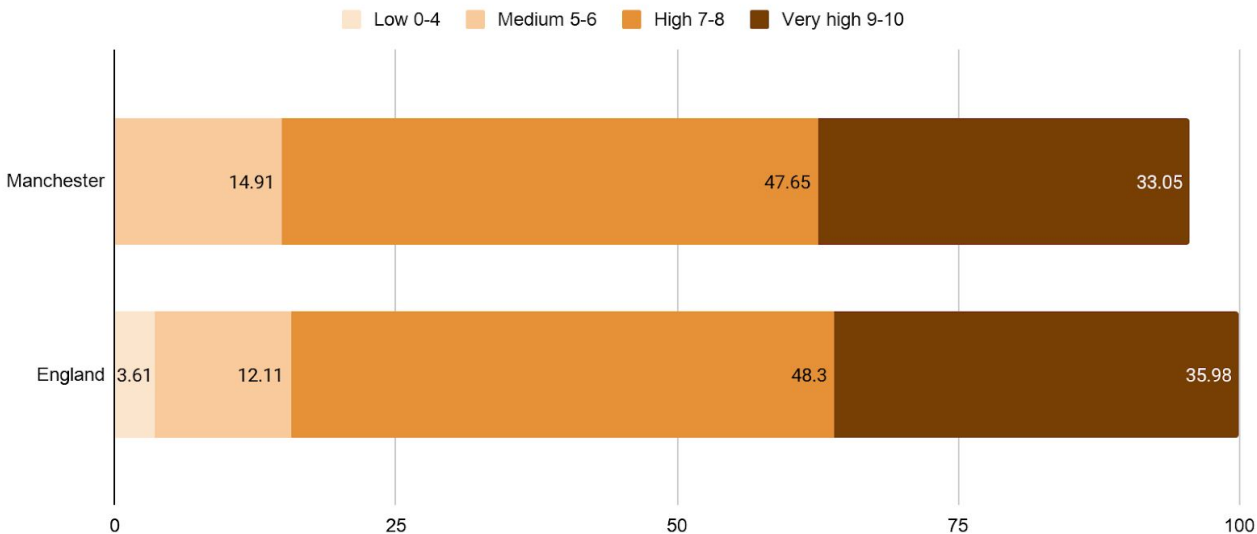
# Appendix : contextual metrics

## ONS Annual personal well-being estimates<sup>20</sup>

People with higher well-being have lower rates of illness, recover more quickly and for longer, and generally have better physical and mental health. Economic measures e.g. Gross Domestic Product (GDP) are necessary, but not sufficient, to reflect a nation's overall progress or well-being. There has been increasing interest in the UK and around the world in using wider measures to monitor well-being and evaluate policy alongside economic measures



**Figure 20: Overall, how satisfied are you with your life nowadays?** Where 0 is 'not at all satisfied' and 10 is 'completely satisfied' % distribution between 4 score bands. Manchester and England data for 2018/19.



**Figure 21: Overall, to what extent do you feel the things you do in your life are worthwhile?** Where 0 is 'not at all worthwhile' and 10 is 'completely worthwhile'. Manchester and England data for 2018/19. The source data for category 0-4 for Manchester has been suppressed as statistically unreliable.

<sup>20</sup> Source: Office for National Statistics Annual Population Survey

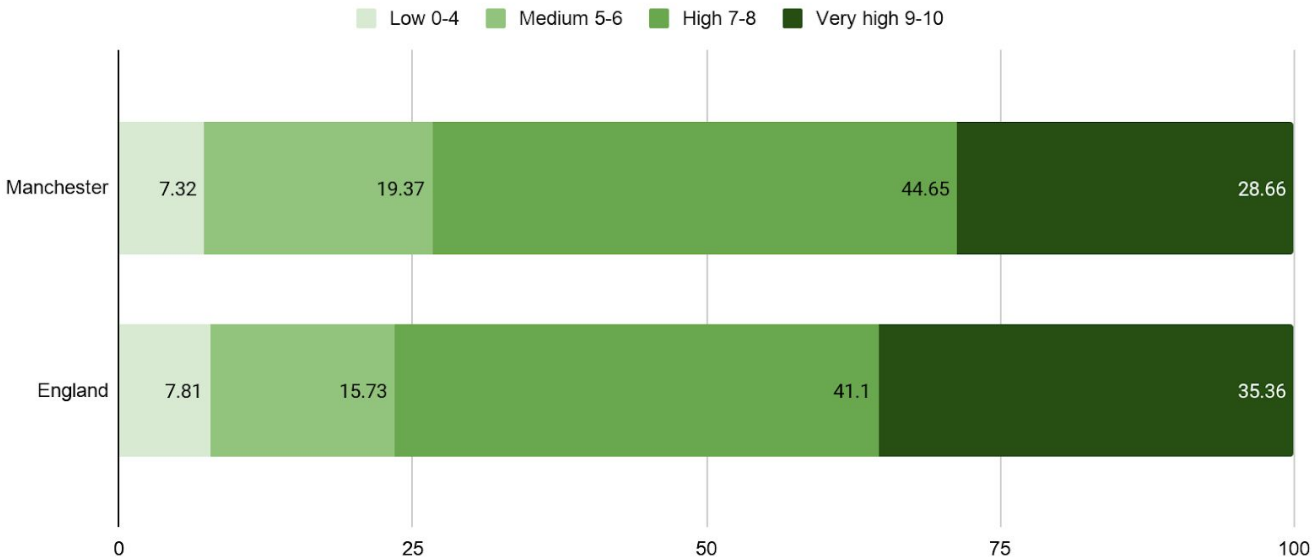


Figure 22: Overall, how happy did you feel yesterday? Where 0 is 'not at all happy' and 10 is 'completely happy'. Manchester and England data for 2018/19

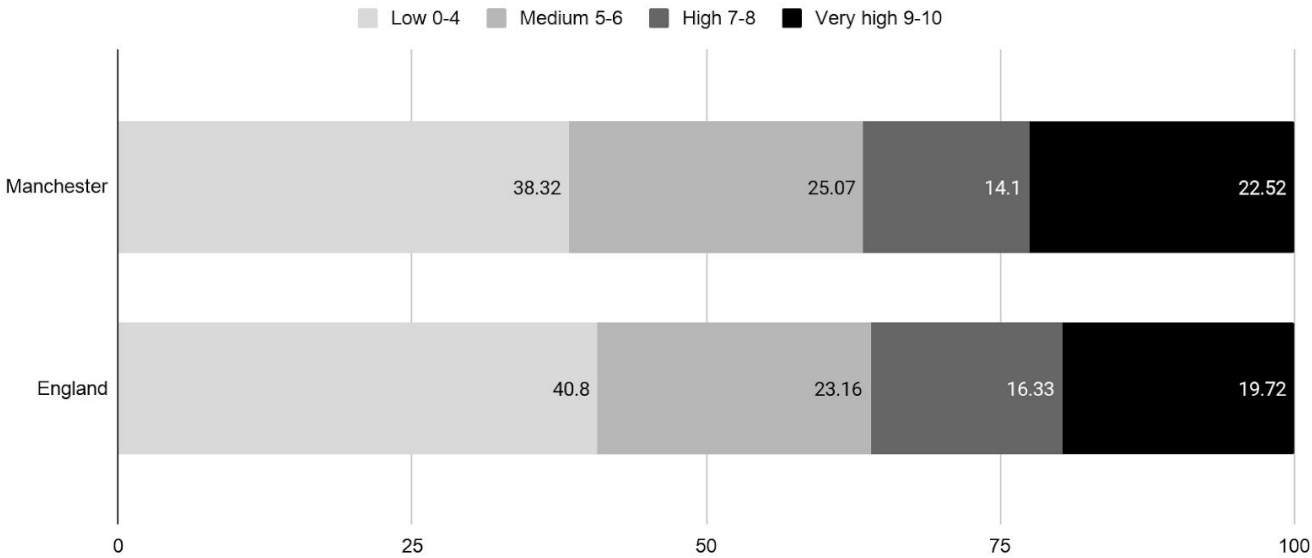


Figure 23: Overall, how anxious did you feel yesterday? Where 0 is 'not at all anxious' and 10 is 'completely anxious'. Manchester and England data for 2018/19

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**Manchester City Council  
Report for Information**

**Report to:** Economy Scrutiny Committee – 5 March 2020

**Subject:** Overview Report

**Report of:** Governance and Scrutiny Support Unit

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**Summary**

This report provides the following information:

- Recommendations Monitor
- Key Decisions
- Work Programme
- Items for Information

**Recommendation**

The Committee is invited to discuss the information provided and agree any changes to the work programme that are necessary.

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**Wards Affected:** All

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**Contact Officers:**

Name: Mike Williamson  
Position: Team Leader- Scrutiny Support  
Telephone: 0161 234 3071  
Email: m.williamson@manchester.gov.uk

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**Background documents (available for public inspection):**

The following documents disclose important facts on which the report is based and have been relied upon in preparing the report. Copies of the background documents are available up to 4 years after the date of the meeting. If you would like a copy please contact one of the contact officers above.

None

## 1. Monitoring Previous Recommendations

This section of the report contains recommendations made by the Committee and responses to them indicating whether the recommendation will be implemented, and if it will be, how this will be done.

Items highlighted in grey have been actioned and will be removed from future reports.

| Date        | Item  | Recommendation   | Response   | Contact Officer |
|-------------|---|--|--|-----------------|
| 10 Oct 2018 | ESC/18/45<br>Gap analysis of the City's Bus network service | To request information including a summary of data that has been used to date to underpin current findings, including information on frequencies of services and services that have been removed or reduced in the last three years. | An email was sent to officers on 20/1/2020 seeking a response this recommendation. | Richard Elliott |

## 2. Key Decisions

The Council is required to publish details of key decisions that will be taken at least 28 days before the decision is due to be taken. Details of key decisions that are due to be taken are published on a monthly basis in the Register of Key Decisions.

A key decision, as defined in the Council's Constitution is an executive decision, which is likely:

- To result in the Council incurring expenditure which is, or the making of savings which are, significant having regard to the Council's budget for the service or function to which the decision relates, or
- To be significant in terms of its effects on communities living or working in an area comprising two or more wards in the area of the city.

The Council Constitution defines 'significant' as being expenditure or savings (including the loss of income or capital receipts) in excess of £500k, providing that is not more than 10% of the gross operating expenditure for any budget heading in the in the Council's Revenue Budget Book, and subject to other defined exceptions.



An extract of the most recent Register of Key Decisions, published on **21 February 2020**, containing details of the decisions under the Committee's remit is included below. This is to keep members informed of what decisions are being taken and, where appropriate, include in the work programme of the Committee.

| <b>Corporate Core</b>  |   |                          |                     |   |   |
|--|---|--------------------------|---------------------|---|---|
| <b>Subject/Decision</b>  | <b>Decision Maker</b>                   | <b>Decision Due Date</b> | <b>Consultation</b> | <b>Background documents</b>                     | <b>Officer Contact</b>  |
| <p><b>Collyhurst Regeneration</b></p> <p><b>Ref: 15/005</b></p> <p>The approval of capital expenditure for land and buildings in Collyhurst.</p>   | City Treasurer (Deputy Chief Executive) | Not before 1st Mar 2019  |                     | Business Case                                   | Eddie Smith, Strategic Director (Development and Growth)<br>e.smith@manchester.gov.uk |
| <p><b>Estates Transformation</b></p> <p><b>Ref:2017/06/30D</b></p> <p>The approval of capital spend to ensure that the operational estate is fit for purpose.</p>                                | City Treasurer (Deputy Chief Executive) | Not before 1st Mar 2019  |                     | Business Case                                   | Richard Munns<br>r.munns@manchester.gov.uk  |
| <p><b>Development of new build Gorton Hub (2019/07/26C)</b></p> <p>Development of a multi-partner hub building in Gorton District Centre to deliver health and care services alongside space</p> | Executive                               | 16 Oct 2019              |                     | Executive Report and Checkpoint 4 Business Case | Richard Munns<br>r.munns@manchester.gov.uk  |

|   |   |                          |  |                            |  |
|---|---|--------------------------|--|----------------------------|--|
| for One Manchester and a reprovisioned library  |   |                          |  |                            |  |
| <b>Hammerstone Road Depot refurbishment (2019/07/30A)</b><br><br>The approval of capital expenditure to refurbish the depot to increase utilisation, reduce carbon emissions and improve the accommodation. | City Treasurer (Deputy Chief Executive)                             | Not before 2nd Sep 2019  |  | Checkpoint 4 Business Case | Georgia Cayton, Estates Service Lead Tel: 0161 234 4659<br>g.cayton@manchester.gov.uk    |
| <b>Development and Growth</b>   |   |                          |  |                            |  |
| <b>Brownfield Land Register Update 2019 2019/03/01D</b><br><br>To publish Manchester's Brownfield Land Register.  | Deputy Chief Executive, Strategic Director (Development and Growth) | Not before 29th Mar 2019 |  | Report and Recommendation  | Richard Elliott, Head of Policy, Partnership and Research<br>r.elliott@manchester.gov.uk |
| <b>Delivering Manchester's Affordable Homes to 2025 - Establishment of Strategic Partnership with Homes England (2019/09/05A)</b><br><br>To negotiate and formalise   | Strategic Director - Development and Growth                         | Not before 4th Oct 2019  | In consultation with the Executive Members for Housing and Regeneration and Finance and HR | Report and Recommendation  | Steve Sheen<br>s.sheen@manchester.gov.uk   |

|   |   |                         |  |                            |  |
|---|---|-------------------------|--|----------------------------|--|
| a Strategic Partnership with Homes England to enable the delivery of Manchester Affordable Homes to 2025  |   |                         |  |                            |  |
| <p><b>Delivering Manchester's Affordable Homes to 2025 - Disposal of sites (2019/09/05B)</b></p> <p>To agree the disposal of sites in Council ownership for the provision of affordable homes</p>   | City Treasurer (Deputy Chief Executive)     | Not before 4th Oct 2019 | In consultation with Strategic Director (Growth and Development) and Executive Members for Housing and Regeneration and Finance and HR | Report and Recommendations | Steve Sheen<br>s.sheen@manchester.gov.uk                     |
| <p><b>Delivering Manchester's Affordable Homes to 2025 - Establishment of Partnership arrangements with Registered Providers (2019/09/05C)</b></p> <p>To establish partnership arrangements with Registered Providers together with their partners/consortium for defined areas in the North, Central, South and Wythenshawe areas of the City.</p> | Strategic Director - Development and Growth | Not before 4th Oct 2019 | In consultation with City Treasurer (Deputy Chief Executive) and the Executive Members for Housing and Regeneration and Finance and HR | Report and recommendation  | Steve Sheen<br>s.sheen@manchester.gov.uk                     |
| <b>Delivering Manchester's Affordable Homes to 2025</b>   | City Solicitor                              | Not before 4th Oct 2019 |  | Report and recommendations | Fiona Ledden, City Solicitor<br>fiona.ledden@manchester.gov. |

|   |   |                         |   |                           |   |
|---|---|-------------------------|---|---------------------------|---|
| <p><b>-Agreement of legal terms (2019/09/05D)</b></p> <p>To enter into and complete all necessary legal documents and agreements to give effect to delivering Manchester's Affordable Homes to 2025</p>   |   |                         |   |                           | uk  |
| <p><b>Buying back former Council properties - Policy approval (2019/09/05E)</b></p> <p>To approve a policy for the Council to buying back properties which have been sold under the Right to Buy to increase the amount of social housing and to reduce the number of former Council properties entering the private rented sector.</p> | Strategic Director - Development and Growth | Not before 4th Oct 2019 | In consultation with the City Treasurer (Deputy Chief Executive) and the Executive Members for Housing and Regeneration and Finance and HR, following consultation with local Ward Members. | Report and Recommendation | Martin Oldfield<br>m.oldfield@manchester.gov.uk |
| <p><b>Buying back former Council properties - Setting of purchase prices (2019/09/05F)</b></p> <p>To agree purchase prices and make any necessary arrangements to purchase</p>  | Strategic Director - Development and Growth | Not before 4th Oct 2019 | In consultation with City Treasurer (Deputy Chief Executive) and the Executive Members for Housing and  | Report and recommendation | Martin Oldfield<br>m.oldfield@manchester.gov.uk |

|  |   |                          |                                 |  |  |
|--|---|--------------------------|---------------------------------|--|--|
| properties in line with the policy   |   |                          | Regeneration and Finance and HR |  |  |
| <p><b>Northern Gateway Strategic Business Plan (2019/09/11A)</b></p> <p>To approve the Strategic Business Plan for the Northern Gateway Joint Venture</p>  | Executive                               | 11 Dec 2019              |                                 | Executive Report and Draft Strategic Business Plan   | Eddie Smith, Strategic Director (Development)<br>e.smith@manchester.gov.uk |
| <p><b>Land Disposal at Blackrock Street, Beswick (2019/09/11C)</b></p> <p>To agree the disposal of land at Blackrock Street, Beswick to One Manchester to facilitate the delivery of 25 social rent homes.</p> | City Treasurer (Deputy Chief Executive) | Not before 10th Oct 2019 |                                 | Executive report - 16.10.19<br>Executive Report - Eastlands Regeneration Framework 13.12.17 and 13.03.19<br>Economy Scrutiny and Executive Report – Delivering Manchester’s Affordable Homes to 2025 06.09.19 & 11.09.19 | Richard Cohen<br>r.cohen@manchester.gov.uk                                 |

### 3. Economy Scrutiny Committee Work Programme – March 2020

| Thursday 5 March 2020, 10.00am<br>(Report deadline Monday 24 February 2020) |  |   |   |   |
|---|--|---|---|---|
| THEME –   |  |   |   |   |
| Item  | Purpose  | Executive Member  | Strategic Director / Lead Officer           | Comments  |
| District Centres  | To report on the work undertaken by the District Centres Sub Group to enable its findings to be integrated into Local Plans.                   | Cllr Richards<br>(Exec Member for Housing and Regeneration) | Eddie Smith                                 | Invite Professor Cathy Parker, Institute of Place Management. |
| Withington Village Development Plan   | To receive a report that provides details of the draft Withington Development Pan prior to public consultation.                                |   | Eddie Smith<br>Martin Saker                 |   |
| HS2 and High Speed North  | To receive an update report following Government's recent commitment to deliver HS2 from London to the north.                                  | Cllr Lease<br>(Leader)                                      | Eddie Smith<br>Pat Bartoli<br>Hilary Sayers |   |
| Overview Report   | The monthly report includes the recommendations monitor, relevant key decisions, the Committee's work programme and any items for information. |   | Mike Williamson                             |   |

**Themes identified at the Committee's Work Programme setting meeting**

**(Items highlighted in grey indicate that these have been included in the work plan of one of the above meetings)**

| Theme   | Tentative Date of meeting                         |
|---|---|
| <p><b>The Effects of Poverty on the City</b></p> <p>To include information on:-</p> <ul style="list-style-type: none"> <li>• Data at a ward level on employment/unemployment rates, self-employment and zero hours contracts, unfilled jobs (how Manchester residents are being trained/upskilled)</li> <li>• Family Poverty</li> <li>• Inclusive Growth (with reference to specific activities)</li> <li>• Equality of jobs and the roll out of the Greater Manchester Good Employment Charter</li> <li>• Work with Schools (promotion of entrepreneurship)</li> </ul> | TBC   |
| <p><b>Young People</b></p> <ul style="list-style-type: none"> <li>• Follow up to the Young People's Workshop in November 2017 (additional workshop session to be arranged)</li> </ul>   | Provisionally between Feb and March 2020 meetings |
| <p><b>Moving from Growth to Wellbeing</b></p> <p>To include information on:-</p> <ul style="list-style-type: none"> <li>• The impact on Manchester residents as the City's economy grows and how these people are supported to ensure they are not left behind</li> <li>• The pace of growth in Manchester's economy</li> <li>• The impact of the growth in Manchester's economy on BAME groups</li> </ul>  | TBC   |

Previous Items identified by the Committee to be scheduled (New items added in blue)

Theme – Strategic Regeneration

| Item  | Purpose  | Lead Executive Member   | Lead Officer                   | Comments                  |
|---|--|---|--------------------------------|---------------------------|
| GM Spatial Framework  | To receive an update on the implementation of the GMSF and its implications for Manchester   | Cllr Leese  | Richard Elliott<br>Eddie Smith |                           |
| Manchester's Local Plan   | To receive an update report in relation to Manchester's updated Local Plan following consultation with Manchester residents and key stakeholders | Cllr Leese  | Richard Elliott<br>Eddie Smith |                           |
| Outcome of the consultation with stakeholders in relation to the proposed Housing Affordability Zones | To receive a report on the outcome of the consultation with stakeholders on the four proposed Housing Affordability Zones                        | Councillor Richards<br>(Exec Member for Housing and Regeneration) | Eddie Smith                    | See November 2017 minutes |



| <b>Theme – Transport and Connectivity</b>                                    |  |  |                     |                           |
|--|--|--|---------------------|---------------------------|
| <b>Item</b>  | <b>Purpose</b>   | <b>Lead Executive Member</b>                         | <b>Lead Officer</b> | <b>Comments</b>           |
| HS2 update   | To receive an update on the progress that has been made with the delivery of HS2 and the impact this will have on the city's economy             | Cllr Leese   | Eddie Smith         |                           |
| Bus Franchising update   | To receive an update on the Greater Manchester Mayors proposals to franchise the regions bus service impact this will have on the city's economy | Cllr Leese   | Richard Elliott     |                           |
| <b>Theme - Skills development for Manchester residents aged 16 and over.</b> |  |  |                     |                           |
| <b>Item</b>  | <b>Purpose</b>   | <b>Lead Executive Member</b>                         | <b>Lead Officer</b> | <b>Comments</b>           |
| Higher Education provision and its impact on the City's economy              | To be determined   | Cllr Rahman (Exec Member Skills Culture and Leisure) | Angela Harrington   |                           |
| Employment Contracts and Labour Market Flexibility                           | To receive a report on changes in employment contracts and labour market flexibility and the implications for workers in Manchester.             |  | Angela Harrington   | See February 2016 minutes |

| Hospitality and Tourism skills gap                      | To receive report on the issue around skills challenges within the hospitality and tourism sector  | Cllr Rahman (Exec Member Skills Culture and Leisure) | Angela Harrington  | See November 2017 minutes             |
|---|--|--|--|---------------------------------------|
| <b>Theme – Growing the Manchester Economy</b>           |  |  |  |                                       |
| <b>Item</b>   | <b>Purpose</b>   | <b>Lead Executive Member</b>                         | <b>Lead Officer</b>  | <b>Comments</b>                       |
| Business Survival rates and the impact on the economy   | To receive a report that details the survival rate of new start up business within the city and the economic impact to the city when these businesses fail | Councillor Leese                                     | Mark Hughes (The Growth Company)<br>Eddie Smith<br>Angela Harrington |                                       |
| City Centre Business Engagement                         | TBC  | Councillor Leese                                     | Eddie Smith  |                                       |
| <b>Theme - Miscellaneous</b>                            |  |  |  |                                       |
| <b>Item</b>   | <b>Purpose</b>   | <b>Lead Executive Member</b>                         | <b>Lead Officer</b>  | <b>Comments</b>                       |
| Development of a Manchester City Council Energy Company | To receive a report on whether the Council was considering a scheme to develop its own energy company  | Councillor Leese                                     | Eddie Smith  | See November 2017 minutes             |
| Economy Dashboard 2019/20 – Quarter 3                   | To receive the 2019/20 Quarter 3 Economy Dashboard   | N/A  | Lewis Smith  | To be submitted to March 2020 meeting |

|  |   |                              |                     |                 |
|--|---|------------------------------|---------------------|-----------------|
| Outcome of the findings from the Tyndall Centre for Climate Change Research    | To receive a report in regards to what is needed to be achieved at Manchester Airport to address carbon emissions | Councillor Stogia            | TBC                 | TBC             |
| <b>Theme – Incorporating Inclusive Growth into Council Services/strategies</b> |   |                              |                     |                 |
| <b>Item</b>  | <b>Purpose</b>  | <b>Lead Executive Member</b> | <b>Lead Officer</b> | <b>Comments</b> |
|  |   |                              |                     |                 |

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