

**Tesco Store, Old Trafford**

**Cumulative Impact Assessment**

PREPARED BY

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## 1. ASSUMPTIONS TO INFORM CUMULATIVE IMPACT ASSESSMENT

1.1 This paper and the attached table 1a has been prepared at the request of Trafford Metropolitan Borough Council to examine the cumulative impact on existing stores and centres of the proposed Tesco at Stretford playing fields in addition to the following commitments:

- Booths, Media City – Approved December 2009. The unit is under construction as part of the wider Media City development
- Sainsbury's Extension, Regents Road, Salford – Approved 16<sup>th</sup> April 2009. Construction has not yet commenced.

1.2 The assumptions set out below reflect the fact that the MT Town Planning Retail Study accompanying the Booths application took no account of the approved Sainsbury's extension. The Sainsbury's extension application was not supported by a retail study. Many of GL Hearn's own assumptions have therefore had to be used.

1.3 All turnovers set out in the Cumulative Impact Table are for 2013 and at 2007 prices.

### Booths, Salford Quays

1.4 This application for a 1,400 sqm net Booths Store was supported by a retail assessment prepared by MT Town Planning. This indicates that the store will provide for the existing and proposed residents of Salford Quays as well as the large numbers of existing employees at Salford Quays, 6,600 new employees at Media City and visitors to Media City and the wider Salford Quays area. The study calculates that in 2014 expenditure within Salford Quays will total £24.6m, of which £12.5m will come from existing and new residents and £12.1m from employees and visitors. It identified that the turnover of existing stores in Salford Quays totals £3.1m, which leaves £21.6m of surplus expenditure available to support additional convenience retail floorspace.

1.5 As this is expected to be the first foodstore to be developed in the Salford Quays area, it is assumed that the store will benefit from the expenditure generated from the large numbers of workforce and visitors to Salford Quays, with additional trade drawn from surrounding residents. Given the anticipated trade draw of the store and the lack of competition in the immediate area, it is expected that it will substantially overtrade by 115%, at a level of £14.04m, when it opens. This compares with the £12.3m turnover suggested by MT Town Planning.

- 1.6 The store is expected to attract 50% of its turnover from outside of the Old Trafford catchment (£7.02m), this being trade from visitors and workers at Media City who do not currently live in the area. The remaining impacts will be upon the Sainsbury's, Salford (£3.40m) as this is the closest competing store for the Salford Quays residents.
- 1.7 Furthermore some trade is expected to be drawn from the Asda, Hulme (£0.25m) and the Aldi, Old Trafford (£0.1m) from residents in the north of the Stretford and Old Trafford Sectors. Some small level of trade draw is also anticipated from Chorlton, with £0.25m from the Morrisons and £0.05m from the remaining shops in the centre as it is expected that some Chorlton residents will work at Media City, especially when the tram line connecting Chorlton with Salford Quays is opened.
- 1.8 Impacts on surrounding food stores and centres at Eccles (£1.30m), Trafford Park (£0.72m), Salford City Centre (£0.15m) and Swinton (£0.30m) are anticipated to be in line with expected shopping patterns of both existing and new Salford Quays residents as informed by the results of the shopper survey.
- 1.9 Following the implementation of the Booths store, there will still be £9.3m of surplus expenditure in Salford Quays to support additional convenience retail floorspace.

#### Sainsburys Salford

- 1.10 This 1,219 sqm extension was proposed to provide "a more spacious trading area at ground floor" according to Sainsbury's application submission. It is therefore assumed to be split according to the standard Sainsbury's floorspace division of 73% convenience and 27% comparison.
- 1.11 It is accepted that extensions to an existing store trade at 30 to 40% of company average turnover. It is assumed that this extension will trade at 40% of company average levels, which equates to 3.69m.
- 1.12 In light of the significant increase in new population in the Salford Quays area, it is assumed that 20% of the extension's turnover (£0.74m) will be drawn from outside of the Old Trafford catchment.
- 1.13 Some of the Salford Quays local resident's expenditure previously attracted to Booths is expected to be diverted to the Sainsbury's extension (£0.84m). The remainder of the trade will be drawn from surrounding stores including Tesco, Salford (£0.75m), Asda,

Trafford Park (£0.55m) Morrisons, Eccles (£0.28m), and Morrisons, Swinton (£0.25m), again as informed by the proposed Tesco shopper survey results.

Tesco, Old Trafford - Impact on Stretford Town Centre

- 1.14 Table 13 of the submitted Impact Assessment shows that £3.65m, or 22% of the Stretford Tesco Metro's total turnover, will be diverted to the proposed Tesco. This will leave the store to function as a basket trade outlet which is still overtrading given that it is the only foodstore in a busy town centre.
- 1.15 The proposed permitted Sainsbury's extension and Booths store will provide for the existing and proposed residents of Salford Quays as well as the large numbers of existing employees at Salford Quays, 6,600 new employees at Media City and visitors to Media City and the wider Salford Quays area. The remaining trade draw to these stores will mainly be from the existing stores within Salford, Eccles and Swinton.
- 1.16 As a consequence, there will be no extra convenience diversion from Stretford Town Centre when the proposed Tesco is added to the extant Sainsburys and Booths permissions in Salford. Equally there will be no additional diversion of non-food linked trips in Stretford Mall that are associated with visits to the Stretford Tesco Metro. Therefore there will be no additional diversion of non-food trade over that identified in the submitted Retail Study. Therefore there will be no change in diversion from Stretford Town Centre.
- 1.17 From a qualitative viewpoint it is highly significant that the former Woolworths unit (the largest vacant unit in Stretford Mall) has recently been occupied by B&M Bargains on a five year lease. This indicates that the health of the town centre is already starting to improve. In addition, the solus figures and the cumulative figures in table 1a assess the impact in 2013 whereas Policy EC16.1d of PPS4 indicates that the effects on a centre should be assessed up to 5 years from the time the application is made, i.e. 2015. At that stage the centre will have recovered further and growth will have been available to ensure that the impact is acceptable.

GL Hearn

14 January 2010

# APPENDIX 1

## CUMULATIVE IMPACT TABLE

TESCO STORES LIMITED  
OLD TRAFFORD

CUMULATIVE IMPACT TABLE 1a - CONVENIENCE STORES RESIDUAL TURNOVER (2013) GLH ASSESSMENT

STORES	Actual Turnover (£m)	Trade Diversion to Booths, Salford Quays (£m)	Residual after Booths (£m)	Trade Diversion to Sainsburys, Salford Extension (£m)	Residual After Booths and Sainsburys Extension (£m)	Amended Diversion to Old Trafford (£m)	Residual (£m)
<b>Stores within Primary Catchment Area</b>							
<b>Sector 1 - Old Trafford</b>							
Aldi, Old Trafford	2.62	0.10	<b>2.52</b>			0.44	<b>2.08</b>
Iceland, Old Trafford	4.90					0.17	<b>4.73</b>
<b>Sector 2 - Stretford</b>							
Iceland, Stretford	2.07					0.42	<b>1.65</b>
Tesco Metro, Stretford	16.25					3.65	<b>12.60</b>
Stretford Town Centre	6.22					0.40	<b>5.82</b>
<b>Sector 3 - Manchester Central &amp; Hulme</b>							
Asda, Hulme	77.80	0.25	<b>77.55</b>			12.68	<b>64.87</b>
Netto, Whalley Range	2.31					0.19	<b>2.12</b>
Manchester City Centre	72.47						<b>72.47</b>
<b>Sector 4 - Chorlton-cum-Hardy</b>							
Morrisons, Chorlton	29.31	0.25	<b>29.06</b>			5.22	<b>23.84</b>
Somerfield, Chorlton	2.20					0.24	<b>1.96</b>
Chorlton District Centre	6.16	0.05	<b>6.11</b>			0.29	<b>5.82</b>
<b>Sector 5 - Sale</b>							
Marks & Spencers, Sale	12.31					0.02	<b>12.29</b>
Sainsburys, Sale	28.21					2.63	<b>25.58</b>
Tesco, Sale	38.74					2.13	<b>36.61</b>
<b>Sector 6 - Urmston</b>							
Somerfield, Urmston	2.62					0.12	<b>2.50</b>
Sainsburys, Urmston	23.87					2.04	<b>21.83</b>
<b>Sector 7 - Salford</b>							
Sainsburys, Salford	41.96	3.40	<b>38.56</b>		42.25	3.26	<b>35.30</b>
Tesco Metro, Salford	12.49	0.30	<b>12.19</b>	0.75	<b>11.44</b>	0.56	<b>10.88</b>
Booths, Salford Quays	14.04			0.84	<b>13.20</b>	0.40	<b>12.80</b>
Salford City Centre	15.73	0.15	<b>15.58</b>	0.18	<b>15.40</b>		<b>15.40</b>
<b>Sector 8 - Eccles</b>							
Morrisons, Eccles	45.63	1.30	<b>44.33</b>	0.28	<b>44.05</b>	1.77	<b>42.28</b>
Eccles Town Centre	12.14	0.10	<b>12.04</b>	0.02	<b>12.02</b>		<b>12.02</b>
<b>Sector X - Trafford Park</b>							
Asda, Trafford Park	81.31	0.72	<b>80.59</b>	0.55	<b>80.04</b>	16.65	<b>63.39</b>
Local Stores within catchment	19.15	0.10	<b>19.05</b>			0.12	<b>18.93</b>
<b>TOTAL WITHIN PRIMARY CATCHMENT AREA</b>							
<b>Stores outside Primary Catchment Area</b>							
Asda, Eastlands	119.69					0.59	<b>119.10</b>
Morrisons, Swinton	32.66	0.30	<b>32.36</b>	0.25	<b>32.11</b>	0.24	<b>31.87</b>
Sainsburys, Fallowfield	25.25					0.32	<b>24.93</b>
Tesco Extra, Altrincham	58.64					0.46	<b>58.18</b>
Tesco Extra, Baguley	66.61					0.40	<b>66.21</b>
Tesco, Irlam	72.87					1.99	<b>70.88</b>
Tesco, Prestwich	51.52			0.08	<b>51.44</b>		<b>51.44</b>
Tesco, Pars Wood	19.59					0.51	<b>19.08</b>
Other stores/ elsewhere	235.23	7.02	<b>228.21</b>	0.74	<b>227.47</b>		<b>227.47</b>
<b>TOTAL</b>		<b>14.04</b>		<b>3.69</b>		<b>57.91</b>	