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Introduction

Cornwall’s Local Plan: Strategic Policies Development Plan Document (LP:SP) sets out policy and capacity figures for retail in the Cornwall Main Towns. This includes towns that are subject to the development of a Neighbourhood Development Plan (those towns are referenced in this report, but not subject to further analysis).

In support of this, the Site Allocations Development Plan Document (Site Allocations DPD) (and associated Town Framework Plans (TFPs)), sets out the retail strategy elements where this requires further planning actions and how those areas plan to accommodate this retail capacity where appropriate.

This retail evidence report documents the evidence collected relating to retail activity in Cornwall, demonstrating how the retail capacity figures affect each of the towns included in the site allocations DPD:

- **Section 1** of this report sets out the Local Plan position relating to retail hierarchy and capacity in Cornwall;

- **Section 2** of this report sets out town descriptions for each of the main towns; and,

- **Section 3** concludes this report and considers whether there is any need for allocations in the Site Allocations DPD.
Section 1: Relationship with the Local Plan and its evidence base

This chapter sets out a summary of the evidence base for retail capacity figures used in the Cornwall Local Plan and the relevant policies and linkages with Site Allocations DPD.

A key principle of the National Planning Policy Framework (NPPF) is to proactively drive and support sustainable economic development through the promotion of competitive town centres that provide customer choice and a diverse retail offer which reflects the individuality of town centres. In order to achieve this, the Council is required to define the extent of Cornwall’s town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and should make it clear which uses will be permitted in such locations through the use of development management policies.

At a local level, the Local Plan contains the main strategic policy relating to retail in Cornwall’s towns and city as well as the spatial strategy and hierarchy for towns across Cornwall. This is covered by policies 3 and 4 of the Local Plan.

In order to set and apply effective town centre development management policies, it is first necessary to understand the current situation within Cornwall’s town and city centres and decide whether additional work is required by the Allocations DPD to maintain healthy town centres over the fifteen year plan period and beyond. Any management mechanisms proposed within the policies in order to protect the role and function of the town and other centres must be sustainable, realistic and based on demonstrable, robust evidence.

The extent of the town and city centres is already established in the Local Plan and accompanying Proposals Maps. The purpose of this Evidence Paper is not to debate or review these boundaries. Instead, this Paper seeks to examine the composition of the respective town centres in terms of the types or ‘uses’ of the premises within the area and, based on this composition, to determine whether additional policy or work is required.

The Cornwall Local Plan

The Local plan provides the golden thread for retail planning in Cornwall. This links together the community strategy and NPPF to produce the following policy directions:

Policy 2 sets out the spatial priorities for Cornwall. This supports (amongst numerous objectives) proposals that would improve conditions for business and investment in Cornwall. In terms of retail, specifically stated priorities are to:

- Support Truro’s wider role as an economic and service centre and maintain its role in the retail hierarchy and as an alternative to major centres outside of Cornwall; and
- Support the economic regeneration of St Austell as a centre for retail, business and leisure with a focus on promoting ‘green’ industries.

Policy 3: Role and function of places (extract only)

The scale and mix of uses of development and investment in services and facilities should be based on the role and function of places. New development 2010-2030 will be accommodated in accordance with the following hierarchy:
1. Delivery of housing, community, cultural, leisure, retail, utility, employment will be managed through a site allocations DPD or Neighbourhood Plans for the following towns:

- Bodmin
- Bude with Stratton and Poughill;
- Callington;
- Camborne with Pool, Illogan and Redruth;
- Camelford;
- Falmouth with Penryn;
- Hayle;
- Helston;
- Launceston;
- Liskeard;
- Newquay with Quintrell Downs;
- Penzance with Newlyn;
- Saltash;
- St Austell;
- St Ives with Carbis Bay;
- Torpoint;
- Truro with Threemilestone; and
- Wadebridge.

Policy 4 sets out the approach to determining retail development proposals in Cornwall. The main town centres form the head of the retail hierarchy (with Truro at the top of that hierarchy) and the focus for retail facilities in line with national guidance.

Town centre boundaries, primary shopping areas and primary shopping frontages are defined on the proposals map inserts of the local plan.

Policy 4: Shopping, services and community facilities

The Council will seek to maintain the retail hierarchy by supporting centres to provide for the needs of their community. Allocations Development Plan Documents and Neighbourhood Plans should ensure that the retail floorspace capacity targets can be delivered by taking account of the market delivery and land available for this. In considering the need for further retail provision Plans should review the level, nature and quality of existing commitments’ ability to meet the space requirements set out in Table 2.

1. Development will be permitted where it supports the vitality and viability of town centres investment within them, and maintains and enhances a good and appropriate range of shops, services and community facilities. Retail and other main town centre uses outside defined town centres (with the exception of small scale rural development) must demonstrate the application of a sequential approach to site selection, where the proposals exceed the applicable threshold and show there is no significant adverse impact on the viability and vitality of, and investment within, the existing centres.

2. Proposals for shops, financial and professional services, and food and drink establishments (Use Class A) will be permitted within the defined town centre primary shopping areas, where:
i) They do not individually or together with other proposals undermine the vitality or viability of the town centre;
ii) The proposal is consistent with the scale and function of the town centre; and
iii) Consideration is given to ensuring that proposals do not eliminate separate access arrangements to the upper floors, which could be used for residential or alternative uses.

3. Within the primary retail frontages identified on the proposals map, the change of use of ground floor Class A1 shop premises to Class A2, A3, A4 and A5 will only be permitted where the proposed use would not undermine the retail function of the town centre and maintain and enhance its vitality and viability. The determination of each application will have regard to the following factors:

i) The location and prominence of the premises;
ii) The size and width of the premises;
iii) The number and distribution of other existing and committed non-A1 uses within the defined primary retail frontage (including any premises subject to current Permitted Development changes of use);
iv) Where applicable, the length of vacancy of the premises and evidence of marketing for the current permitted use;
v) The nature and character of the proposed use; and
vi) The design of the shop-front.

The above considerations will normally be sufficient to assess applications for a change of use. Premises do not have to be vacant or marketed for a change of use to be acceptable. Nevertheless, the length of any vacancy of the premises and evidence of unsuccessful marketing for the current permitted use may be evidence of a lack of demand and changing retail patterns.

4. Community facilities and village shops should, wherever possible, be retained and new ones supported. Loss of provision will only be acceptable where the proposal shows:
   a. no need for the facility or service;
   b. it is not viable; or
   c. adequate facilities or services exist or the service can be re-provided in locations that are similarly accessible by walking, cycling or public transport.

The retail evidence base

As part of the evidence base for the Local Plan, the Council appointed consultants to calculate the capacity for convenience and comparison goods retail provision in each town for the Plan period. This work was first published in 2010 and took into account a range of population growth scenarios and used 2008 data. The Council subsequently commissioned an update of the report, based on new survey work and updated housing number projections. The report has been prepared by GVA for Cornwall Council and provides a partial update to the 2010 Cornwall Retail Study (‘the 2010 study’) which was also prepared by GVA and published in November 2010. The 2010 and the 2015 Retail Update reports may be accessed on the Council’s website: http://www.cornwall.gov.uk/environment-and-planning/planning/planning-policy/adopted-plans/evidence-base/cornwall-retail-study/

The National Planning Policy Framework (‘NPPF’) notes that local planning authorities should “allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability”.

6
The study concentrates upon the assessment of quantitative need for retail floorspace in Cornwall and provides an update to part of the 2010 study, providing an assessment of the available retail expenditure to support convenience and comparison goods floorspace in Cornwall’s main settlements.

The results of the study were taken forward by the Council in the development of the Cornwall Local Plan and formed part of the evidence for that document at its successful Examination.

It should be noted that the capacity forecasts for convenience and comparison goods floorspace outlined below in Table 1 are based upon constant market shares for each settlement after the impact of commitments has been taken into account. For further explanation as to the possibilities of changing the market share of individual settlements the full report may be accessed on the Council’s website: [http://www.cornwall.gov.uk/environment-and-planning/planning/planning-policy/adopted-plans/evidence-base/cornwall-retail-study/](http://www.cornwall.gov.uk/environment-and-planning/planning/planning-policy/adopted-plans/evidence-base/cornwall-retail-study/) although any further assessment of changing market shares should be undertaken as and when potential development sites and development proposals are considered.

The floorspace capacity levels outlined below are indicative and are based upon indicative sales density levels for convenience and comparison goods floorspace. These capacity levels can be refined as and when more detailed proposals come forward.

The report takes into account all committed floorspace for these categories at the time of completing the capacity forecasts in March 2015.

Where the table below shows a negative figure, this indicates that the anticipated quantitative floorspace capacity for the town has been exceeded. The Council recognises that this data represents a ‘snapshot’ of capacity at the time of preparing the forecasts and this was based on the housing requirement and distribution in the Plan as originally submitted for Examination. It should be read in the context that some of that committed floorspace may not be delivered (due to changing retail patterns), or remain vacant, and further permissions granted after the completion of the forecasts will both need to be factored into the floorspace capacity for the relevant town(s).

In some towns there may be instances where a particular commitment may still have an extant planning permission but there is little prospect of it being implemented. As circumstances may change prior to the expiry of each permission, the Retail update does not completely exclude the commitment from its analysis. In those cases the study has provided an alternative quantitative need scenario for the relevant settlements. This mainly affects St Austell, Launceston and Falmouth where substantial convenience permissions have been granted and may not be implemented.

The capacity calculations will be monitored against permissions, completions and vacancies throughout the plan period. The capacity forecasts are based on existing centres retaining their current market share (or adapting to the consequences of unimplemented permission known at that time in other locations). The plan does not propose any change to the existing market share of centres.
Table 1: Local Plan Retail Floorspace Capacity Requirements 2010-30 in the main towns subject to the Site allocations DPD

### Convenience goods (food)

<table>
<thead>
<tr>
<th>Settlement</th>
<th>Year - sq. m net sales area</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2014</td>
</tr>
<tr>
<td>Bodmin</td>
<td>0</td>
</tr>
<tr>
<td>Camborne, Pool, Redruth</td>
<td>-880</td>
</tr>
<tr>
<td>Falmouth</td>
<td>-2215</td>
</tr>
<tr>
<td>Hayle</td>
<td>-1971</td>
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<tr>
<td>Helston</td>
<td>-136</td>
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<tr>
<td>Launceston</td>
<td>561</td>
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<tr>
<td>Newquay</td>
<td>-5895</td>
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<tr>
<td>Penzance</td>
<td>-571</td>
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<tr>
<td>St Austell</td>
<td>-1096</td>
</tr>
<tr>
<td>Saltash</td>
<td>-1084</td>
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<tr>
<td>Totals:</td>
<td>-13896</td>
</tr>
</tbody>
</table>

### Comparison goods (non-food)

<table>
<thead>
<tr>
<th>Settlement</th>
<th>Year - sq. m net sales area</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2014</td>
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<tr>
<td>Bodmin</td>
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</tr>
<tr>
<td>Camborne, Pool, Redruth</td>
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<td>Falmouth</td>
<td>-9559</td>
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<tr>
<td>Hayle</td>
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<tr>
<td>Helston</td>
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<td>Launceston</td>
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<td>Newquay</td>
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<td>Penzance</td>
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<td>St Austell</td>
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</tr>
<tr>
<td>Saltash</td>
<td>-2081</td>
</tr>
<tr>
<td>Totals:</td>
<td>-55381</td>
</tr>
</tbody>
</table>

Source: Cornwall Retail Study Update (March 2015)

An update is being prepared as part of the Annual Monitoring Report for retail commitments and completions in the main towns subject to the Site Allocations DPD. This will include recently issued permissions at St Austell and Hayle, which significantly reduce the capacity for additional comparison goods retail. There is a more significant capacity for comparison goods space in Camborne, Pool, Redruth in 2030. A more ‘organic’ provision of floorspace within the existing town centre boundary for both comparison and convenience floorspace is likely to be sufficient to operate within the capacity identified for the remainder of the towns.
Section 2: Town descriptions

At a local level, the Local Plan contains the main strategic policy relating to retail in Cornwall’s towns and city as well as the spatial strategy and hierarchy for towns across Cornwall. This is covered by policies 3 and 4 of the Local Plan.

In order to set and apply effective town centre development management policies, it is first necessary to understand the current situation within Cornwall’s town and city centres and decide whether additional work is required by the Allocations DPD to maintain healthy town centres over the fourteen year plan period and beyond. Any management mechanisms proposed within the policies in order to protect the role and function of the town and other centres must be sustainable, realistic and based on demonstrable, robust evidence.

The extent of the town and city centres is already established in the Local Plan and accompanying Proposals Maps. The purpose of this Evidence Paper is not to debate or review these boundaries. Instead, this Paper seeks to examine the composition of the respective town centres in terms of the types or ‘uses’ of the premises within the area and, based on this composition, to determine whether additional policy or work is required.

The town summaries are contained in Appendix A. Each considers the need for the allocation of additional retail floorspace over the plan period. As appropriate, recommendations are made where the actions identified require a planning policy approach.

Section 3: potential need for additional floorspace allocation

The retail capacity for each place should not be confused with need for additional space. The figures take into account all committed floorspace for convenience and comparison floorspace at the time of completing the capacity forecasts in March 2015.

Those towns with a negative figure are not proposed to be subject to any allocation of retail space within the Site Allocations DPD, recognising that the anticipated quantitative floorspace capacity for the town has been exceeded. The remainder of the towns, other than Camborne, Pool, Redruth and Launceston have relatively small capacity figures for both convenience and comparison goods.

The ability of the majority of the towns to provide further comparison goods floorspace where there remains capacity to do so, can be provided through suitable town centre site come forwards in the latter years of the plan period.

After taking into account planning permissions granted since April 2015 there are only two towns remaining with a more significant capacity remaining over the plan period.

Camborne, Pool, Redruth:

The retail update recognises that the towns have experienced a fall in comparison floorspace/units and turnover and this, alongside other factors eliminates floorspace capacity until after 2024.

The report considers that the ability to provide further comparison goods floorspace can be enhanced by an increase in the area’s market share should a suitable town centre site come
forward. However, the ability to increase CPR’s market share and provide new comparison goods floorspace will be significantly affected by the grant of planning permission for either of the two current large non-food proposals at Marsh Lane in Hayle.

In order to provide regeneration benefits for the towns, a site is proposed within the town centre at Fair Meadow Car Park. This follows a process of site consideration the framework for Camborne, Pool Redruth that examined the potential of car parking sites in the towns for retail space. The land is considered the most appropriate of the development options within the town centre, due to its location and existing links and its ability to create improved links between the railway station and the town centre. There are more parking spaces than required within the town, making the loss of the car park acceptable. The site has previously secured a planning permission for its redevelopment, although this has now expired.

**St Austell:**

There is the potential that the Tesco extension commitment will now not be implemented. The same is possible for the Morrisons store on Pentewan Road. If both permission are discounted then comparison goods floorspace capacity in St Austell could rise to 1,400sq m net at 2019, 4,000sq m net at 2024 and 7,400sq m net at 2030.

In terms of convenience goods floorspace, the latest assessment predicts a significant fall in surplus due the grant of planning permission to the Morrisons supermarket proposal on Pentewan Road, along with the loss of market share due to commitments in other settlements. Surplus convenience goods floorspace capacity now only arises after 2019 and is at a modest level by 2024 (650sq m net), rising to 1,600sq m net by 2030. Given that these capacity levels only arise in the medium to longer term, along with the good quality of existing and committed floorspace in the town, there is not considered to be a need to allocate further land for convenience goods floorspace outside of St Austell town centre.

At the time of preparation of this report there are proposals for redevelopment of Old Vicarage Place in the town centre. This would significantly enhance the appearance of the town centre and have positive regeneration effects. Whilst it is not necessarily required, given a low capacity identified for comparison goods floorspace, it is the largest site available in the town centre and on this basis it is considered that the DPD could propose allocation of the site.

**Launceston:**

Within the latest assessment, capacity levels have reduced significantly in the short to medium term due to the grant of planning permission of a new Morrisons supermarket. There remains capacity for additional floorspace, including 1,200sq m net by 2019 and circa 2,000sq m net by 2030. Given the grant of permission for a new Morrisons store, we do not consider that there is a need for the another out of centre allocation of convenience goods floorspace, although there remains a need to continue to protect and enhance the convenience goods sector in the town centre against the growing level of competition from out of centre floorspace.
Capacity levels for comparison goods floorspace follow a similar pattern, with a reduction to the Morrisons supermarket commitment, commitments in other settlements affecting (to a small extent) Launceston’s market share and also the general lower levels of expenditure growth. On this basis, and using an equilibrium approach (due to similar falls in turnover and floorspace), capacity for additional comparison goods floorspace in Launceston only arises after 2024, with circa 2,300sq m net of capacity by 2030. On this basis, there is no need to plan for additional comparison goods floorspace within Launceston.

Section 4: conclusions

The retail capacity for each place should not be confused with need for additional space. The figures take into account all committed floorspace for convenience and comparison floorspace at the time of completing the capacity forecasts in March 2015.

Those towns with a negative figure are not proposed to be subject to any allocation of retail space within the Site Allocations DPD, recognising that the anticipated quantitative floorspace capacity for the town has been exceeded.

In the towns with a small or no quantitative need for convenience it is recognised that the data represents a ‘snapshot’ of capacity at the time of preparing the forecasts in 2015. It should be read in the context that some of that committed floorspace may not be delivered (due to changing retail patterns), or remain vacant, and further permissions granted after the completion of the forecasts will both need to be factored into the floorspace capacity for the relevant town(s). The capacity calculations will be monitored against permissions, completions and vacancies throughout the plan period. The capacity forecasts are based on existing centres retaining their current market share (or adapting to the consequences of unimplemented permission known at that time in other locations).

The remainder of the towns, other than Camborne, Pool, Redruth and Launceston have relatively small capacity figures for both convenience and comparison goods. After taking into account planning permissions granted since April 2015 there are only two towns remaining with a more significant capacity remaining over the plan period. Whilst St Austell has a small capacity identified for comparison goods, it is considered alongside Camborne Pool, Redruth as a town where allocations could be proposed on the basis of regeneration benefits that could inure. Both locations would benefit from the certainty associated with an allocation.

The town summaries produced in Appendix A for each of the towns that are subject to the allocations DPD will be updated through the monitoring process.
Appendix 1: Town Descriptions
Town centre strategy - Bodmin

What is the role, function and place in retail hierarchy of the town?

Bodmin is an important market town attracting a wide catchment from the surrounding area.

The town centre is mainly linear arranged around the historic core. The main street (Fore Street) is relatively flat but roads leading to it tend towards steep. The town centre core is predominantly through Fore Street and Honey Street. There are also a number of businesses located in Bell Lane, Dennison Road and Bree Shute Lane. This is a historic centre and there are some impressive buildings such as the former market hall, library and the Shire Hall complex. The main area is long and relatively busy with traffic. The town is dominated by independent retailers, although there are some national retailers. There is substantial out of centre representation of national retailers and food stores. The vacancy rate in the town centres is higher than many other towns (although this fluctuates). There is a reasonable offer in the town centres.

Site options in town for new retail provision are limited, but opportunities should be explored at the Bell lane car park and to the south of Fore Street. These are both potentially developable, but have their own issues with historic structures and making links back to Fore Street.

This assessment covers a 5 year period, but will be reviewed alongside the Cornwall Local Plan.

Which issues are raised by the Local Plan?

Local Plan/Town Framework:

- Policy 3 (Role and Function of Places) identifies Bodmin as a suitable location for larger scale retail development;

What is the vision for the future of the town Centre?

The vision for Bodmin is to maintain and strengthen its town centre retail offer and in doing so to reduce the need for trips to other centres. Development will build on existing successful regeneration schemes for the town centre. Small businesses will be encouraged and supported to continue the creation of a shopping destination for the area. New shopping uses will be concentrated in the town centre to create a lively town centre area.

The public realm of Bodmin, particularly in Fore Street, will be improved through regeneration efforts and potentially, pedestrianisation.

Potential growth in the plan period

There is no capacity remaining food retail and capacity for non-food retail space exists from 2030 onwards.
Are there opportunities for redeveloping under-utilised spaces in the town centre?

There is potential through regeneration at the Dennison car park and the area to the south of Fore Street, although both need careful consideration and linkages back to Fore Street.

Should the centre be expanded to provide for additional uses or growth?

There is currently no quantitative requirement for the expansion of the town centre.

What are the implications of:

- Demographic change?

There is a growing expectation of town centres to act as more than retail centres. A growing leisure and meeting place function is important to the continued health of Bodmin.

- Infrastructure delivery?

Improved public realm being proposed through projects and the introduction of additional facilities would help to increase the attractiveness of the centre to visitors. There is also a funded scheme to extend the Camel Trail through the town, to link up to the Lanhydrock estate. This will potentially increase the number of visitors into the town centre. There are also funded schemes to improve the highways around the town centre, helping to address air quality and enable future growth. The scheme is seeking a more innovative approach of utilising shared spaces, to promote the role of the pedestrian – which in turn should improve the town centre environment.

There is also a desire to improve the healthcare provision to cater for the planned growth. There is a desire to see this improved provision within the town centre or on an edge of centre site.

In what timeframe should new retail floorspace be provided?

The Cornwall Retail Study Update (2015) suggests that when including planning permissions and completed building that there is the following retail capacity remaining for Bodmin:

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food retail</td>
<td>-609</td>
<td>-1576</td>
<td>-1113</td>
<td>-591</td>
</tr>
<tr>
<td>Non-food retail</td>
<td>-480</td>
<td>-1154</td>
<td>-58</td>
<td>1364</td>
</tr>
</tbody>
</table>

Please note that floorspace capacity estimates are cumulative and in square metres.

Are any complementary strategies needed to enhance the town centre and help deliver the vision for its future?
• Better marketing of the high street to encourage visitors who may not be aware of it;
• Better tie-ins with existing marketing via tourist attractions also. Potential for links and offers between high street businesses and tourist attractions to encourage tourist footfall into the town centre after their attraction visit.
• Continuation of regeneration efforts.
• Consideration of part pedestrianisation of Fore St, to improve safety and improve the shopping experience (but should only be seen as a feasibility / pilot in the first instance, to understand the true impacts). Plus any such measures should only be delivered as part of a wider regeneration package for the town centre
• It should also be noted that there are various proposals that have been prepared by a local interest group, Better Bodmin. Their vision seeks the regeneration of various town centre and edge of centre sites, including Fore Street and Dennison Road Car parks

How can parking provision be enhanced to encourage town centre vitality?

Explore cheaper short term tariffs to encourage greater dwell times in the town centre. A significant rise between the 1 hour and 2 hour tariff serves to discourage this.

Pay on exit parking could potentially help to promote longer dwell time in the centre.

Town centre health check: Note: data last updated 2013

A1 retail comprised of 47.4% of the towns capacity followed by professional Services at 17.5% and food and drink services at 11.5%. The vacancy rate was identified as 9.9% of all town centre uses premises counted in the centre.

**Analysis:** Change to centre diversity in the period 2011/12 to 2012/13:

**Convenience:** The number of Convenience units remained the same at 10 units although their share of centre capacity rose slightly from 5.78% to 6.13%. This represents an increase of 0.35% but remains below the 2011/12 Cornwall average by 1.97%;

**Comparison:** Comparison uses decreased by 1 unit but its share of centre capacity increased by 1.41% from 32.95% to 34.36%, leaving the sector below the 2011/12 Cornwall average by 6.19%.

**Service:** The service sector increased quite significantly by 6 units increasing centre capacity share by 6.19% form 41.04% to 47.23%.

**Vacant:** The number of vacant premises dropped significantly by 17 units from 34 to 17. This represents an outstanding 50% take up of previously vacant units. Centre capacity for vacant units consequently fell 9.22% from 19.65% to 9.9%, only marginally above the Cornwall average.
**Miscellaneous:** Miscellaneous uses have increased from 1 unit to 3 units increasing capacity by 1.27% from 0.58% to 1.85%, 0.71% above the Cornwall average.

**Pedestrian flows 2001-2011**

<table>
<thead>
<tr>
<th>Centre</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
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<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bodmin Lower Bore Street</td>
<td>6268</td>
<td>6472</td>
<td>7154</td>
<td>7236</td>
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<td>8387</td>
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<td>6393</td>
<td>4811</td>
<td>6565</td>
<td>6248</td>
</tr>
</tbody>
</table>

Source: Cornwall Council, 2011

- **Accessibility:**

  The main street is generally flat but the approaches from the car park are often quite steep. Signage of pedestrian routes needs to be addressed to recommend suitable routes.

  In common with a number of centres in Cornwall, there are a number of the shops that are not DDA compliant.

- **Perception of safety/crime:**

  No current data

- **State of town centre environmental quality:**

  Despite the condition of the public realm being in good state, the town centre still has a tired feel/look about it. There are also a number of low level issues which could be easily resolved including weeds (especially in the bases of tree guards), bins need cleaning, all benches could do with painting to freshen up, Information Map boards are dirty and not well located.

  A lot of the shop fronts are in need of a clean/paint, and currently add to the tired look of the town centre.

Note: Vision etc April 2015, other data May 2013
Town Centre Strategy - Camborne

What is the role, function and place in retail hierarchy of the town?

Camborne is an important retail centre attracting a wide catchment from the surrounding towns and villages. It sits joint fifth in the retail hierarchy (alongside Bodmin) for Cornwall and contains the fifth highest proportion of national retailers in Cornwall.

The town centre is nucleated, although it extends considerably to the east, with a variety of retail unit sizes and a mix of chain and independent retailers.

The town must be taken in context with the nearby centre of Redruth within the conurbation of Camborne, Pool, Redruth and also Pool with its larger retail sheds and ambitions for additional retail growth for larger footprint retail uses.

Camborne and Redruth Town Centres provide a valuable, retail offer. Camborne has a stronger retail offer than Redruth. The quality of the local provision, together with the growth of retail within the surrounding areas has resulted in a low proportion of residents’ spending on ‘comparison’ (non-food) shopping being retained within CPIR. In contrast most food shopping expenditure is retained within the area, although this is still dominated by the edge of town and out of town supermarkets.

The town centre is a Business Improvement District

This assessment covers a 5 year period, but will be reviewed alongside the Cornwall Local Plan.

Which issues are raised by the Local Plan, Neighbourhood Plan or Business Improvement District?

**BID:**

- There is shrinkage in the town centre, especially in Commercial Street, Chapel Street and Trelowarren Street (Wesley Street end). Some of this shrinkage is due to a few absent landlords whose property is in poor condition and affecting neighbouring properties. How the town is managed is also a factor;
- National retailers are consolidating to larger town centres;
- Coffee shops, betting shops and charity shops are on the increase in the town centre as are discount stores;
- The town has 2 new hotels since 2012 the second a new 35 bedroom hotel at Wetherspoon opening in summer 2015
- Future provision should include more leisure uses (not just food and drink) and extended opening (7am – 1am);
- Mainline train station is not exploited as an asset;
- Welcome and directional signage is poor and the town is not currently promoted to visitors. BID Camborne is launching a new website [www.cambornetown.com](http://www.cambornetown.com) in Spring 2015 to address this;
- There are concerns about the long term future of Cornwall Council assets such as the library;
• Camborne is a World Heritage Site Town with no cultural attraction to reflect this status;
• Business rates are too high.
• The Cornwall Council car park (Rosewarne) is poorly located for access and very poorly signed.

Local Plan/Town Framework:

• Policy 3 (Role and Function of Places) identifies Camborne with Pool, Illogan and Redruth as suitable locations for larger scale retail development;
• Improve the quality of offer in both Camborne and Redruth town centres and focus predominantly on small multiples and independents & Leisure;
• The bus station represents the biggest opportunity for future growth in Camborne;
• Provide different but complementary roles for Camborne, Pool and Redruth, strengthening comparison shopping in particular;

What is the vision for the future of the town centre?

The vision is to deliver an improved and complementary retail and leisure offer within Camborne. This is linked to the successful regeneration of the area, taking a holistic approach to new development.

This will enable a more coordinated and complementary offer for CPIR, with Camborne and Redruth town centres focusing more on independent stores and small multiples that provide a good quality offer for their own communities. The town will build on the considerable local loyalty and value for money offered under the banner ‘a real Cornish town’. This will help to retain greater local spend in the town, particularly with independent shops, recycling spend in the local economy and building a stronger town centre for local shoppers.

A better mix of uses will be encouraged, including leisure uses, visitor facilities linked to World Heritage and cultural and educational uses as well as office and service sector uses to take advantage of the location and mainline train access.

Potential growth in the plan period

The bus depot and bus station site has delivery issues, but still represents a good opportunity to create new well located parking, open space and leisure or retail facilities within the town centre as well as the opportunity to create more housing in the centre to increase vitality of the town.

The Rosewarne carpark is poorly located for most visitors to the town centre and could potentially be redeveloped to increase residential presence in the town as long as some of the parking capacity was replaced, ideally on the bus depot site.
Are there opportunities for redeveloping under-utilised spaces in the town centre?

Potential schemes:

Redevelopment of the ‘Jim’s cash and carry’ site to remove an unsightly gap in the frontages on Trelowarren Street;

There are a number of under-utilised public buildings and buildings under threat of closure. The Old Fire Station, Old Gurneys Lane toilet block and possibly Camborne Library could potentially be available over the plan period.

Commercial Street also has a number of buildings with various owner problems, which would benefit from a co-ordinated approach to improvement.

Landlords of the empty 'above shop' space should be encouraged to make it residential to increase in-town occupancy and footfall

Should the centre be expanded to provide for additional uses or growth?

There is likely to be no requirement for the expansion of the town centre and there may be a case for contraction in the Trelowarren Street area and to the south of the Primary Retail Area, although BID Camborne would prefer to try and keep the Trelowarren Street area to keep the town link to the new housing, the large Council offices and Tesco as a town anchor store.

In what timeframe should new retail floorspace be provided?

The Cornwall Retail Study Update (2015) suggests that due to existing planning permissions and completed building that there is the following retail capacity remaining for Camborne, Pool and Redruth (combined):

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food retail</td>
<td>-880</td>
<td>-948</td>
<td>-188</td>
<td>642</td>
</tr>
<tr>
<td>Non-food retail</td>
<td>-7352</td>
<td>-5906</td>
<td>-3889</td>
<td>3348</td>
</tr>
</tbody>
</table>

Please note that floorspace capacity estimates are cumulative and in square metres.

Are any complementary strategies needed to enhance the town centre and help deliver the vision for its future?

- A lack of signage is raised as an issue that needs to be addressed;
- Improvements to evening bus services;
- Enhancement of public realm, including attention to narrow pavements;
- Potential extension of the Town Heritage Initiative beyond 2016 to secure additional improvements to buildings in the town centre, many of which are in a poor state of repair;
- Creation of additional residential to increase customer base for town centre;
- Better linkages between the town centre and the Tesco store and new housing at Dolcoath;
- Creation of World Heritage visitor offer in the town.
How can parking provision be enhanced to encourage town centre vitality?

The Rosewarne Car Park is poorly located and all car parks are poorly signposted. Improved directional signage would be of benefit.

Privately provided car parking in the town is competitively priced and well used.

**Town centre health check:** (Note: data last updated 2013)

There were 242 units identified within Camborne town centre

A1 retail comprised of 49.2% of the towns capacity followed by professional services at 14.9%, and food and drink services at 12.8%. The vacancy rate was identified as 12.8% of all town centre uses premises counted in the centre.

**Analysis: Change to centre diversity in the period 2011/12 to 2012/13:**

**Convenience:** The number of Convenience units have decreased by 1 unit, marginally reducing the sectors centre capacity by 0.69% but remains healthily above the 2012/13 Cornwall average.

**Comparison:** Comparison uses on the other hand increased by 6. However, centre capacity only marginally increased by 1.05% and remains significantly below the Cornwall average by 4.5%.

**Service:** the number of Service uses have remained unchanged although the capacity has marginally fallen by 0.91%.

**Vacant:** The proportion of vacant units increased by 2 units with the centre capacity increasing by 0.59% placing the capacity above the Cornwall average by 4.8%.

**Miscellaneous:** Miscellaneous uses have remained static at 2 units with a slight decrease in centre capacity by 0.04% below but on a par with the Cornwall average.

- **Commercial yields on non-domestic property** – TBC
- **Customer views and behaviour** – None undertaken to date.
- **Retailer representation** - The number of major multiple retailers within Camborne town centre has decreased by two representations in the past year due to a shift in counting town centre area as opposed to the Goad retail area. Camborne currently ranks joint fifth with Bodmin in Cornwall’s retail hierarchy based on major national retail representation, below St Austell and Newquay but above Helston and Redruth.
- **Commercial rents** – TBC
- **Pedestrian flows:**

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>Annual average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Camborne:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trelowarren St</td>
<td>8,301</td>
<td>7,932</td>
<td>8,030</td>
<td>8,046</td>
<td>8,077</td>
</tr>
</tbody>
</table>

Source: Cornwall Council Highways (May 2013)
• **Accessibility:**

There are main bus and rail stations within reach of the town centre, although the route from the station isn’t always clear.

Narrow pavements can make access difficult. Poor surfacing in some areas where utilities have poorly replaced surfaces after work has been carried out.

A signage audit has been undertaken and a number removed, but a comprehensive and coherent signage scheme needs to be delivered to reduce confusion and improve accessibility.

• **Perception of safety/crime:**

Safer Camborne scheme launched as part of Safe Cornwall. There is a perception of issues with safety and street drinkers in Commercial Square. This is a management issue and street drinkers have been moved on. The perception of poor safety has lingered and needs to be addressed.

• **State of town centre environmental quality:**

There is an issue of vacancies and poorly maintained premises, often due to absentee landlords neglecting buildings. Public realm surfaces have been poorly treated by utilities and often are not replaced with the same quality materials, leaving uneven and unsightly surfaces.

Managed shrinkage of the retail area may be required to retain a viable and vibrant focus for the town centre in the future.
**Town centre strategy - Hayle**

**What is the role, function and place in retail hierarchy of the town?**

Hayle is an important market town attracting a wide catchment from the surrounding villages.

The town centre is mainly arranged around two separate cores, namely Copperhouse in the east and Foundry Square in the west. Both are relatively flat, linear and are for the most part attractive historic streets and spaces. The town is dominated by independent retailers, although at Foundry Square there is a substantial new Asda superstore. At Loggans Moor, the West Cornwall Retail Park is a substantial out of centre retail park with Marks and Spencer, Costa, Boots and Next. The vacancy rate in the town centres is lower than many other towns (although this fluctuates). There is still a good offer in the town centres.

Site options in town for new retail provision are limited, but opportunities should be explored, particularly around the Foundry Square area.

This assessment covers a 5 year period, but will be reviewed alongside the Cornwall Local Plan.

**Which issues are raised by the Local Plan?**

**Local Plan/Town Framework:**

- Policy 3 (Role and Function of Places) identifies Hayle as a suitable location for larger scale retail development;
- Build on regeneration successes in Hayle and provide for existing and additional demand for retail services in a growing population.

**What is the vision for the future of the town Centre?**

The vision for Hayle is to maintain and strengthen its town centre retail offer and in doing so to reduce the need for trips to other centres. Development will build on existing successful regeneration schemes for the town centre. Small businesses will be encouraged and supported to continue the creation of a shopping destination for the area. New shopping uses will be concentrated in the town centres to create lively town centre areas.

The public realm of Hayle, particularly in the Foundry Square area, will be improved through regeneration efforts.

**Potential growth in the plan period**

There is capacity from 2019 for food retail and from 2024 non-food retail space and this could potentially be delivered through redevelopment of a number of smaller sites in the town centre, possibly around the Foundry Square area.
Are there opportunities for redeveloping under-utilised spaces in the town centre?

There is potential through regeneration in the Foundry Square area, including the Jewsons site if it is vacated.

Should the centre be expanded to provide for additional uses or growth?

There is currently no requirement for the expansion of the town centre.

What are the implications of:

- Demographic change?

There is a growing expectation of town centres to act as more than retail centres. A growing leisure and meeting place function is important to the continued health of Hayle.

- Infrastructure delivery?

Improved public realm being proposed through projects and the introduction of a market would help to increase the attractiveness of the centre to visitors. Better linkages need to be made between the town centre and ‘downtown’ at Coronation Park/Lidl.

In what timeframe should new retail floorspace be provided?

The Cornwall Retail Study Update (2015) suggests that when including planning permissions and completed building that there is the following retail capacity remaining for Hayle:

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food retail</td>
<td>-1971</td>
<td>134</td>
<td>394</td>
<td>677</td>
</tr>
<tr>
<td>Non-food retail</td>
<td>-3172</td>
<td>-270</td>
<td>632</td>
<td>1797</td>
</tr>
</tbody>
</table>

Please note that floorspace capacity estimates are cumulative and in square metres.

Are any complementary strategies needed to enhance the town centre and help deliver the vision for its future?

- Better marketing of the high street to encourage visitors who may not be aware of it due to out of town retail park and bypass;
- Better consistency of branding in the eastern end of the town centre;
- Continuation of strong website (www.hayletown.co.uk ) which has the same branding as the new public realm, and has very good listings of the businesses;
- Continuation of regeneration efforts.
How can parking provision be enhanced to encourage town centre vitality?

There are two main parking areas at either end of the town as well as on-street parking. However there are concerns that parking charges are high, potentially discouraging visits (especially in the context of the retail park, which offers free parking).

Town centre health check: Note: data last updated 2013

A1 retail comprised of 63.9% of the town's capacity followed by food and drink services at 14.5% and professional Services at 9.9%. The vacancy rate was identified as 7.2% of all town centre uses premises counted in the centre.

Analysis: Change to centre diversity in the period 2011/12 to 2012/13:

Convenience: The number of Convenience units has decreased by 1 unit from 15 to 14 representing a decrease in the share of centre capacity by 0.67% from 13.76% to 13.09% but remains significantly above the 2011/12 Cornwall average by 4.99%.

Comparison: Comparison uses increased by 8 units and represents an increase in its share of centre capacity by 8.09% from 33.03% to 41.12%, leaving the sector now marginally above the 2011/12 Cornwall average by 0.57%.

Service: The service sector has remained static at 6 units although increasing centre capacity share marginally by 0.68% form 36.7% to 41.12%.

Vacant: The number of vacant premises dropped significantly by 10 units from 18 down to 8 units. This represents an outstanding 44.4% take up of previously vacant units. Centre capacity for vacant units consequently fell 9.03% from 16.51% to 7.20%, comfortably below the Cornwall average by 1.92%.

Miscellaneous: Miscellaneous uses have increased from 0 units to 1 unit, increasing capacity to 0.93%, but remains 0.21% below the Cornwall average.

- **Commercial yields on non-domestic property** – TBC
- **Customer views and behaviour** – TBC
- **Retailer representation** – There is only Boots as a national retailer, with one shop in each part of the town centre.
- **Pedestrian flows**: Information is not currently collected for this centre.
- **Accessibility:**

  The town is located generally flat and the centre is relatively easy to traverse. However, in common with a number of centres in Cornwall, there are a number of the shops that are not DDA compliant.

- **Perception of safety/crime:**
No data at this time.

- **State of town centre environmental quality:**

  Public Realm is very well maintained with very little sign of weeds, graffiti or vandalism. New street furniture installed in a lot of areas including street lighting, bus shelters, cycle racks and large planters (especially in the Foundry Square area). There are well maintained grass, flowers and seating areas overlooking the Estuary. Foundry Square has undergone regeneration works to improve the Public Realm (open space).

Note: Vision etc April 2015, other data May 2013
Town centre strategy - Helston

What is the role, function and place in retail hierarchy of the town?

Helston is an important market town attracting a wide catchment from the surrounding villages. It sits joint sixth in the retail hierarchy (alongside Redruth) for Cornwall and contains the Seventh highest proportion of national retailers in Cornwall.

The town centre is mainly arranged around two streets with Coinagehall Street sloping increasingly steeply away from the core. There is a variety of retail unit sizes and a mix of chain and independent retailers. The vacancy rate in the centre is comparable with other towns and fluctuates. There has been shrinkage in businesses in the town centre area and there have been vacancies in the primary retail frontages.

The retail sector represents another valuable employer for Helston and one that it is important to support further, primarily comparison retail. Whilst Helston is well provided for convenience shopping, albeit through edge of centre and out of centre supermarkets, a significant proportion of Helston residents’ comparison retail spending leaks to other towns. As a result, the aim is to maintain and strengthen Helston’s town centre retail offer and in doing so, supporting town centre and edge of centre opportunities to expand its comparison retail offer. Whilst site options are limited, opportunities should be explored.

This assessment covers a 5 year period, but will be reviewed alongside the Cornwall Local Plan.

Which issues are raised by the Local Plan, Neighbourhood Plan or Town Centre Management?

Local Plan/Town Framework:

- Policy 3 (Role and Function of Places) identifies Helston as a suitable location for larger scale retail development;
- Improve the quality of offer in Helston and focus predominantly on small multiples and independents;
- Reduce retail spending leakage to other centres;
- Maintain Helston’s role as the main retail and service centre in the area and enhance the attractiveness and viability of the town centre.

Town Centre Management:

- Concern regarding take up levels of betting shops (although this is now reducing) and charity shops, especially within the Primary Shopping Area;
- Traditional convenience (food) shops are in decline and being replaced by coffee shops and service uses;
- Signage is poor from the bypass and this means that visitors may not enter the town centre, although this is being addressed in a public realm strategy;
- Helston lacks a USP; quirky, independent shops may help to provide this;
- There is little that encourages shoppers to dwell in the town centre. The town operates predominantly as a local centre for top up shopping;
Supermarkets on the edge of the town have had a negative effect on trading, alongside the loss of national retailers;

An additional public space could create a new focus for the town centre, especially if used for holding markets, festivals and events;

Users of the centre consider that the town centre doesn’t have enough community meeting spaces (seating, markets etc);

More work is required to raise the profile and visitor attractions that the town has to offer.

**What is the vision for the future of the town Centre?**

The vision for Helston is to maintain and strengthen Helston’s town centre retail offer and in doing so to reduce the need for trips to other centres. The unique cultural heritage and attractive buildings and spaces of the town centre will be used to create a distinctive and quirky shopping experience. Leisure uses, amongst the other shopping uses will help to create a town centre that people want to visit and spend time in. Small businesses will be encouraged and supported to create a shopping destination for the area. New shopping uses will be concentrated in the town centre to create a lively town centre.

The public realm of Helston will be improved through the addition of a new events and market space and improvements to the surfaces throughout the town centre. The other hidden assets of the town such as the Museum and Coronation Park will be better recognised and form part of the offer of the town. A new signage system will help people to explore every part of our town centre.

**Potential growth in the plan period**

There is capacity from 2024 onwards for both food and non-food retail space and this could potentially be delivered through redevelopment of a number of smaller sites in the town centre. There is potential to redevelop the Co-op and Trengrouse Way car park site later in the plan period.

**Are there opportunities for redeveloping under-utilised spaces in the town centre?**

Helston Town Council has decided to prioritise the Grylls Monument/Bowling green area as their priority scheme for spending the current s.106 public realm funds. There are ongoing discussions around the possibility of staging markets there this year, but delivering the aspiration of a new market space in the Trengrouse Way car park will be dependent on new funding becoming available in the future.

Potential schemes:

The Co-op has a lack of visibility from the main street and could be redeveloped to provide a market square and retail shops to fill gaps in provision in the main streets (potentially DIY based).

Land to the rear of the post office and the Registry Office could potentially be subject to redevelopment later in the plan period, although these sites are constrained by current uses.
Should the centre be expanded to provide for additional uses or growth?

There is currently no requirement for the expansion of the town centre.

What are the implications of:

- Demographic change?

There is a growing expectation of town centres to act as more than retail centres. A growing leisure and meeting place function is important to the continued health of Helston.

- Infrastructure delivery?

Improved public realm being proposed through projects and the introduction of a market would help to increase the attractiveness of the centre to visitors. Better linkages need to be made between the town centre and ‘downtown’ at Coronation Park/Lidl.

In what timeframe should new retail floorspace be provided?

The Cornwall Retail Study Update (2015) suggests that due to existing planning permissions and completed building that there is the following retail capacity remaining for Helston:

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food retail</td>
<td>-136</td>
<td>141</td>
<td>493</td>
<td>869</td>
</tr>
<tr>
<td>Non-food retail</td>
<td>0</td>
<td>-325</td>
<td>134</td>
<td>721</td>
</tr>
</tbody>
</table>

Please note that floorspace capacity estimates are cumulative and in square metres.

Are any complementary strategies needed to enhance the town centre and help deliver the vision for its future?

- Incentives for small businesses, including help with start-up costs, rent and rates for a period of 6 months should be offered.
- Potential to explore ‘meanwhile uses’ to reduce vacant uses between vacation and take up by new businesses/tenants;
- Introduction of market and meeting space – creation of a focal point;
- Need to increase the relevance of the town to younger people;
- Overhaul of town trail and heritage marketing;

How can parking provision be enhanced to encourage town centre vitality?

There is an excess of parking provision at Trengrouse Way, resulting in a poorly kept and laid out space. This could be improved and reduced to create a better area.
The introduction of a half hour tariff would help support shorter top up shops and reduce perceptions of expensive parking. Privately provided space within the town centre is poorly located, but cheaper than public provision.

Pay on exit parking would help to promote longer dwell time in the centre.

Town centre health check: Note: data last updated 2013

A1 retail comprised of 43.5% of the towns capacity followed by professional Services at 19% and food and drink services at 12%. The vacancy rate was identified as 9.5% of all town centre uses premises counted in the centre.

Analysis: Change to centre diversity in the period 2011/12 to 2012/13:

Convenience: The number of Convenience units have decreased by 2 units, marginally reducing the sectors centre capacity by 1.78% and now falls below the 2012/13 Cornwall average by 1.6%.

Comparison: Comparison uses increased marginally by 3 units whilst the overall centre capacity marginally decreasing by 0.89% and remains significantly below the Cornwall average by 8.2%.

Service: Service uses have increased by 3 units but represents a marginal overall decrease in centre capacity by 1.94%, and remains significantly above the Cornwall average by 7.3%;

Vacant: The proportion of vacant units increased by 7 units increasing centre capacity by 3.45% now placing it marginally above the Cornwall average by 1.7%.

Miscellaneous: Miscellaneous uses have increased by 2 units with the centre capacity rising markedly by 1.16% from to 1.8%, comfortably above the Cornwall average.

- Commercial yields on non-domestic property – TBC
- Customer views and behaviour – TBC
- Retailer representation - The number of major multiple retailers within Helston town centre has been reduced to 4 units with the loss of New Look as shown in the table above. Helston currently ranks joint sixth with Redruth in Cornwall’s retail hierarchy based on major national retail representation, below Bodmin and Camborne with 7 representations but above Launceston and Bude with 3 representations each.
- Pedestrian flows: Information is not currently collected for this centre.
- Accessibility:

  The town is located on a steep slope and a number of the shops are not DDA compliant. Improvements are required to allow disabled and reduced mobility access into town from Trengrouse car park.
Signage of pedestrian routes needs to be addressed to recommend suitable routes.

- **Perception of safety/crime:**
  
The results of a survey completed by the Town Council in March 2014 have shown that people are generally happy and that there are good perceptions of safety in the day and the evening. There is a good police presence in the town.

- **State of town centre environmental quality:**
  
The town centre environment is generally in a good state of repair, although some landlords are not investing. There is a 50/50 grant available for shop front improvements (around 4-5 years remaining of this scheme) and a targeting of ‘hot spots’ with community groups. Works are a quick fix rather than long term maintenance and the town team look after vacant units.

Note: Vision etc April 2015, other data May 2013
Town centre strategy - Launceston

What is the role, function and place in retail hierarchy of Launceston?

Launceston is a market town attracting a wide catchment from the surrounding towns and villages. It sits joint seventh in the retail hierarchy (with Bude) for Cornwall, based on the proportion of national retailers in the town.

This is a historic town centre and is nucleated occupying the heart of the older part of Launceston. There is a variety of retail unit sizes and a mix of a small number of chain and a majority of independent retailers. The vacancy rate in the centre is relatively high.

The town’s location at the heart of a wide rural area and a gateway to Cornwall results in it providing a valuable role for the wider rural area, however the town still experiences difficulties in attracting national retailers. Supermarket provision mainly outside of the town centre area and other retail space has been developed to the south of the A30 along with residential growth.

This assessment covers a 5 year period, but will be reviewed alongside the Cornwall Local Plan.

Which issues are raised by the Local Plan?

Local Plan/Town Framework:

- Policy 3 (Role and Function of Places) identifies Launceston as suitable for retail development;
- Maintain and enhance the area’s heritage assets for the community’s benefit and enhance the area’s tourism offer;

What is the vision for the future of the town Centre?

Support will be given to retail uses within or on the edge of the town centre, with a view to helping to secure the regeneration of the town centre environment and providing community facilities.

Opportunities to strengthen Launceston’s town centre offer and provide new retail and leisure uses will be pursued with particular focus on appropriate design quality and heritage impacts being appropriately addressed. One of the sites that could be suggested for redevelopment are currently used for parking provision and this needs to be addressed carefully to ensure a good balance of accessibility and facilities.

Potential growth in the plan period

There is considered to be a capacity for additional comparison goods space of 2,248 square metres after 2024 and 1,993 square metres of convenience goods space by 2030. It is considered that this can be provided for through redevelopment and infill development within and adjacent to the town centre.
Are there opportunities for redeveloping under-utilised spaces in the town centre?

There are potential opportunities to redevelop the derelict buildings at Spry’s Garage, the former Tax Office and to examine potential to utilise an area of the Cattle Market. Both of these sites have the potential to be sensitively redeveloped to provide additional space for convenience and comparison goods retailing. These are both out of the primary retail area and good linkages will need to be made to ensure that they support the town centre.

Should the centre be expanded to provide for additional uses or growth?

There is no requirement for the expansion of the town centre.

What are the implications of:

- Demographic change?
  Changing attitudes to town centre shopping and expectations of the town centre environment, need to lead to a move away from a ‘pure’ shopping offer to a more experienced based offer with recreation and meeting places.

- Infrastructure delivery?
  No current information

In what timeframe should new retail floorspace be provided?

The Cornwall Retail Study Update (2015) suggests that due to existing planning permissions and completed building that there is only additional capacity for non-food retail space after 2024, but a small capacity, rising to 1,993 square metres for food retail space.

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Food retail</strong></td>
<td>561</td>
<td>1215</td>
<td>1586</td>
<td>1993</td>
</tr>
<tr>
<td><strong>Non-food retail</strong></td>
<td>-1082</td>
<td>-111</td>
<td>918</td>
<td>2248</td>
</tr>
</tbody>
</table>

Please note that floorspace capacity estimates are cumulative and in square metres. They assume that all currently committed floorspace (i.e. space with a valid planning permission will be constructed in full).

Are any complementary strategies needed to enhance the town centre and help deliver the vision for its future?

- Continued support for town centre regeneration projects to compliment previous townscape heritage work undertaken that has improved the quality of the centre;
- Funding for key environmental improvements to public realm and legibility between the town centre and the Cattle Market car park;
How can parking provision be enhanced to encourage town centre vitality?

- No information provided

Town centre health check: Note: data last updated 2013

- A1 retail comprised of 51.4% of the town’s capacity followed by professional services at 15.1% and food and drink services at 11.1%.
- Proportion of vacant street level property: 11.2%

Analysis: Change to centre diversity in the period 2011/12 to 2012/13:

- **Convenience:** The number of Convenience units have increased by 4 units from 11 to 15 units, markedly increasing the sector’s centre capacity by 2.42% from 6.51% to 8.93% placing the sector marginally above the 2011/12 Cornwall average by 0.83%.
- **Comparison:** Comparison uses dropped by 5 units from 59 to 54 units. However, centre capacity only marginally decreased by 2.77% from 34.91% to 32.14% and remains significantly below the Cornwall average by 8.41%.
- **Service:** Service uses has increased slightly by 1 unit from 75 to 76 units and represents a marginal increase in centre capacity of 0.86% from 44.38% to 45.24%. The sector remains comfortably above the Cornwall average by 4.15%;
- **Vacant:** The proportion of vacant units decreased by 2 units decreasing centre capacity by 1.12% from 13.02% down to 11.1% placing the capacity above the Cornwall average by 2.78%.
- **Miscellaneous:** Miscellaneous uses have increased by 1 unit from 2 to 3 units. This represents an increase in centre capacity by 0.61% from 1.18% to 1.79%, remaining above the Cornwall average by 0.65%.
- **Commercial yields on non-domestic property** – TBC
- **Customer views and behaviour** – No recent surveys undertaken.
- **Retailer representation** - The number of major multiple retailers within Launceston town centre remains low.
- **Pedestrian flows:** No data at this time.
- **Accessibility:**

The centre is relatively flat, but there are steep areas that affect accessibility.
**Town centre strategy - Newquay**

**What is the role, function and place in retail hierarchy of Newquay?**

This takes into account audits that assess the role, viability and potential to accommodate new development and different types of development.

The assessment covers a 5 year period, but will be reviewed alongside the Site Allocations DPD.

Newquay is an important retail centre attracting a wide catchment from the surrounding towns and villages as well as a substantial summer trade from its role as a tourism centre. The number of major multiple retailers within Newquay town centre has increased by 1 in the past year with the opening of a Tesco store and now includes 12 units as shown in the table above. Newquay currently ranks joint third with St Austell in Cornwall’s retail hierarchy based on major national retail representation, below Falmouth with 14 representations but above Camborne and Bodmin both with 7 representations.

The town centre is linear, extending to supermarkets to west, south and east. There is a variety of retail unit sizes and a mix of chain and independent retailers. The vacancy rate in the centre is relatively low, although this fluctuates between summer and winter.

Recent planning permissions for food and non-food retailing outside of the town centre and in or around the Newquay Growth Area have resulted in a lack of need for additional retailing in the town (including the town centre). The challenge for Newquay will be to continue to improve and regenerate the town centre to maintain and improve its vitality and viability, especially outside of the busy summer period.

The town centre is a Business Improvement District.

**Which issues are raised by the Local Plan, Neighbourhood Plan or Business Improvement District?**

**Local Plan**

- Policy 3 of the Local Plan (Role and function of places) supports Newquay’s retail role to provide local services.
- PP8 states that town centre regeneration will be promoted to enhance the shopping offer of Newquay and restore heritage assets.

**Neighbourhood Plan**

- A neighbourhood plan is currently under preparation, but the content relating to the town centre is not known at this stage.

**BID**

- Newquay needs additional places to meet and residential presence to add vitality to the town centre;
The offer of Newquay is moving away from purely shopping to encapsulate social events etc;

- The state of town centre sites remains an issue for the town, the edges of the retail area have derelict sites and some of the buildings in the town centre remain in poor condition;
- There is a ‘retail revolution’ of small businesses manufacturing and selling – this requires smaller spaces and more support;
- The town struggle struggles to attract key retailers;
- Vacancy rates have bucked the national trend, but there is high turnover of businesses, partially linked to seasonality of the town centre;
- The growth area has the potential to polarise the retail offer of Newquay between residents and holiday makers (e.g. a high street in the growth area catering for residents and the town centre becoming more seasonally based) and this needs to be carefully balanced.

What is the vision for the future of the town centre?

The vision for the town centre is to maintain and enhance the mix of uses currently present in the town centre to create a diverse and inviting retail environment. Regeneration initiatives will be encouraged that help to support and enhance the retail offer and restore our historic buildings. Retail and leisure uses will continue to be clustered in the town centre to ensure that access to the city centre by sustainable transport modes and walking trips by residents is maintained and enhanced.

Primary retail frontages are set out in the Neighbourhood Plan and the Cornwall Local plan, within which priority will be given to maintaining active retail frontages. The shopping experience needs to be more sustainable for full time residents of the town to ensure that they can meet more of their non-food shopping needs without having to leave the town.

Potential growth in the plan period

The grant of planning permission for a large amount of convenience goods floorspace within a mixed use development proposal at Trevithick Manor, plus a resolution to grant planning permission for a large supermarket within the Newquay Growth Area (‘NGA’) mixed use development now means that there is no capacity remaining for growth in retail in Newquay.

Based upon the impact of these two proposals, plus the impact of convenience goods commitments in surrounding settlements, there is now an over-supply of between 5,000-6,000sq m net of convenience goods floorspace in Newquay. This will significantly boost the amount of non-food retail space outside of the town centre. There is likely to be a significant adverse impact upon the health of Newquay town centre should these proposals be implemented.

Based upon the above, there is no need to plan for additional convenience and comparison goods floorspace in Newquay up to 2030 and alternatively, the focus should be on supporting the health and attractiveness of Newquay town centre.

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1 GVA Grimley advice to Cornwall Council in respect of the Trevithick Manor application
Are there opportunities for redeveloping under-utilised spaces in the town centre?

Potential schemes:

- The redevelopment of derelict sites and buildings in poor repair offer opportunities for expanding the offer of the town centre;
- Flexible spaces for small start-up businesses are necessary to promote the next generation of retailers.

Should the centre be expanded to provide for additional uses or growth?

There is no requirement for the expansion of the town centre.

What are the implications of:

- Demographic change?
  
  Changing attitudes to town centre shopping and expectations of the town centre environment need to lead to a move away from a ‘pure’ shopping offer to a more experienced based offer with recreation and meeting places.

- Infrastructure delivery?
  
  The town centre public realm strategy has only been partially implemented and this has detracted from the appearance of the town centre.

- Economic change?
  
  The condensing of the tourism season (due to school absence policy) has increased pressure on infrastructure during the school holidays and limits turnover outside of those periods.

In what timeframe should new retail floorspace be provided?

The Cornwall Retail Study Update (2015) suggests that due to existing planning permissions and completed building that there is no additional retail capacity remaining for Newquay:

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food retail</td>
<td>-5895</td>
<td>-5983</td>
<td>-5497</td>
<td>-4952</td>
</tr>
<tr>
<td>Non-food retail</td>
<td>-20479</td>
<td>-11099</td>
<td>-9587</td>
<td>-7637</td>
</tr>
</tbody>
</table>

Please note that floorspace capacity estimates are cumulative and in square metres. They assume that all committed floorspace (i.e. space with a valid planning permission will be constructed in full).

Are any complementary strategies needed to enhance the town centre and help deliver the vision for its future?

- Implementation of the town centre design guide;
The town centre signage project will be improving the appearance of finger posts in April-May 2015;
Park and ride over the summer months would help to reduce congestion and improve access to the town centre;
A space for a market and regular market days would help to bolster the offer of the town;
Flexible spaces for small start-up businesses are necessary to promote the next generation of retailers;
Funding for key environmental improvements to public realm and appearance of key buildings would help to lift the appearance of the town centre.

How can parking provision be enhanced to encourage town centre vitality?

- Pricing of parking is an issue, but the issue of parking times is more of an issue - Pay on exit charging would help to resolve this.

Town centre health check: Note: data last updated 2014

- Diversity of uses - A1 retail comprised of 42% of the towns capacity followed by professional services at 12% and food and drink services at 20%.
- Proportion of vacant street level property – 6%

Analysis: Change to centre diversity in the period 2011/12 to 2012/13:

**Convenience:** The number of Convenience units has increased by 5 units, increasing their share of centre capacity by 1.97% bringing it above the 2012/13 Cornwall average by 1.4%;

**Comparison:** Comparison uses increased by 2 units, its share of centre capacity subsequently increasing marginally by 1.79%, leaving the sector slightly below the 2012/13 Cornwall average by 1.9%.

**Service:** The service sector decreased significantly by 13 units reducing its centre capacity share by 3.25%. This remains significantly above the Cornwall average by 4.9%.

**Vacant:** The number of vacant premises remained static at 16 units, the centre capacity increasing overall by 0.12% but remains healthily below the Cornwall average by 3.8%.

**Miscellaneous:** Miscellaneous uses have decreased by 2 units, decreasing centre capacity by 0.63% from 0.68%, but still below the Cornwall average by 0.6%.

- **Commercial yields on non-domestic property** – TBC
- **Customer views and behaviour** – No recent surveys undertaken, but BID renewal is due in 2015 and information may be collected during that process.
• **Retailer representation** - The number of major multiple retailers within Newquay town centre has increased by 1 in the past year with the opening of a Tesco store and now includes 12 units as shown in the table above. Newquay currently ranks joint third with St Austell in Cornwall’s retail hierarchy based on major national retail representation.

• **Pedestrian flows:**

<table>
<thead>
<tr>
<th>Newquay, Bank St</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>Annual average</th>
</tr>
</thead>
<tbody>
<tr>
<td>counted</td>
<td>13,574</td>
<td>13,936</td>
<td>13,998</td>
<td>11,344</td>
<td>13,213</td>
</tr>
</tbody>
</table>

Source: Cornwall Council Highways (May 2013)

• **Accessibility:**

Much of the town centre is easily accessible with some areas of slope that may be more difficult for some users. Completion of the public realm works would help to create better surfaces and clarity of spaces for traffic and pedestrians. Parking is well placed for the town centre, although seasonal congestion may deter users.

• **Perception of safety/crime:**

Newquay Safe and Newquay Clean are notable successes and the BID organises around 10 press trips per year to help change perceptions of Newquay that are now out of date relating to drinking culture and unsafe reputation. Large clubs have closed as well as 18-30 camping sites close to the town and big drinking pubs have increasingly migrated to food offer. Newquay is now more widely perceived as a safe and clean environment for families.

• **State of town centre environmental quality:**

This is a mixed experience of environmental quality in the town centre. Some of the more prominent derelict hotel sites have been cleared or are being redeveloped at present.

Resurfacing works in Newquay town centre were commenced but never completed, leaving very definite areas of poor quality public realm. A BID project is restoring and replacing signage, but work is required to complete transformation of the public realm, this is potentially linked to S.106 monies from the Newquay Growth Area.
**Town centre strategy - Penzance**

**What is the role, function and place in retail hierarchy of Penzance?**

Penzance is a large town attracting a wide catchment from the surrounding towns and villages. It sits second in the retail hierarchy for Cornwall based on the proportion of national retailers in the town.

This is a historic town centre and whilst nucleated, the retail area extends considerably, most notably from the centre towards the railway station. There are a variety of retail unit sizes and a mix of chain and independent retailers. The vacancy rate in the centre is relatively high.

Penzance town centre acts as a shopping centre for its local residents as well as for West Cornwall, providing access to a range of retailers, although more recent developments at Hayle have reduced the reliance on Penzance for some national retailers. Large supermarket provision is exclusively outside of the town centre area with 3 substantial stores to the east of the town alongside other bulky goods stores. There is small supermarket provision within the town centre including two Cooperative stores, a Tesco Express, Lidl and Iceland.

The town is in need of further investment to ensure it continues to represent an attractive destination. Due to the growth of internet shopping, it is recognised that if the centre is to flourish it needs to develop a complementary mix of uses – providing a destination where the shops form part, albeit the most important part, of a wider leisure experience. This mixed use approach could be extended from the existing town centre to the waterfront, enabling the town to reconnect with its major asset, Mount’s Bay.

This assessment covers a 5 year period, but will be reviewed alongside the Cornwall Local Plan.

**Which issues are raised by the Local Plan or the Neighbourhood Plan?**

**Neighbourhood Plan:**

A Neighbourhood Plan is being prepared for Penzance, but information relating to retail approach of the plan was not available at the time of preparation (August 2016).

**Local Plan/Town Framework:**

- Policy 3 (Role and Function of Places) identifies Penzance as suitable for retail development;
- Recognises the strategic role of Penzance as a retail centre for the west of the county;

A Town Centre management function is currently being appointed for Penzance and this will inform the updating of this paper in due course.
**What is the vision for the future of the town Centre?**

Support will be given to retail uses within or on the edge of the town centre, with a view to helping to secure the regeneration of the town centre environment.

The economy of Penzance will be broadened and diversified, developing the town as West Cornwall’s retail centre and tourism hub. Retail space will be revised to ensure that the town remains attractive to new retailer investment and representation. Regeneration will build on the unique heritage and character of the town. Opportunities to expand the retail space of the town will be explored around the Harbour carpark area to provide a strong linkage between the town centre and the station and waterfront.

**Potential growth in the plan period**

There is considered to be little capacity for additional comparison goods space before 2030 and a small amount of convenience goods space up to 2030. It is considered that this can be provided for through redevelopment and infill development within and adjacent to the town centre.

**Are there opportunities for redeveloping under-utilised spaces in the town centre?**

Additional space could be provided for through infill and redevelopment sites within the town centre, however the key opportunity to expand the retail area lies in the Harbour carpark area, although this would require the re-provision of parking on the site. This site is outside of the primary retail area and good linkages will need to be made to ensure that it supports the town centre.

**Should the centre be expanded to provide for additional uses or growth?**

There is potential for the expansion of the town centre to include the Harbour carpark area if this is selected as a development site to be allocated.

**What are the implications of:**

- **Demographic change?**

  Changing attitudes to town centre shopping and expectations of the town centre environment need to lead to a move away from a ‘pure’ shopping offer to a more experienced based offer with recreation and meeting places.

- **Infrastructure delivery?**

  No current information

**In what timeframe should new retail floorspace be provided?**

The Cornwall Retail Study Update (2015) suggests that due to existing planning permissions and completed building that there is only additional capacity for
non-food retail space after 2024, but a small capacity for food retail space from 2024.

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food retail</td>
<td>-571</td>
<td>-478</td>
<td>141</td>
<td>821</td>
</tr>
<tr>
<td>Non-food retail</td>
<td>-4776</td>
<td>-3914</td>
<td>-1951</td>
<td>579</td>
</tr>
</tbody>
</table>

Please note that floorspace capacity estimates are cumulative and in square metres. They assume that all currently committed floorspace (i.e. space with a valid planning permission will be constructed in full).

**Are any complementary strategies needed to enhance the town centre and help deliver the vision for its future?**

- Continued support for town centre regeneration projects to compliment previous townscape heritage work undertaken that has improved the quality of the centre;
- Funding for key environmental improvements to public realm and legibility between the town centre and potential redevelopment site at the Harbour carpark;

**How can parking provision be enhanced to encourage town centre vitality?**

- To be discussed

**Town centre health check: Note: data last updated 2013**

- A1 retail comprised of 58.8% of the towns capacity followed by food and drink services at 14.3% and professional services at 10.4%.
- Proportion of vacant street level property: 10.4%

**Analysis:** Change to centre diversity in the period 2011/12 to 2012/13:

**Convenience:** The number of Convenience units decreased by 2 units and the share of centre capacity was consequently reduced by 0.47% from 8.62% to 8.15% but remains marginally above the 2011/12 Cornwall average by 0.05%;

**Comparison:** Comparison uses remained static at 164 units but its share of centre capacity increased marginally by 0.34% from 42.82% to 43.16%, leaving the sector above the 2011/12 Cornwall average by 2.61%.

**Service:** The service sector decreased by 3 units from 145 down to 142 units reducing centre capacity share by 0.49% from 37.86% to 37.37%, remaining below the Cornwall average by 3.72%.

**Vacant:** The number of vacant premises increased by 1 unit from 39 to 40 while centre capacity consequently increased 0.35% from 10.18% to 10.53% but remains only marginally above the Cornwall average by 1.41%.
Miscellaneous: Miscellaneous uses have increased from 2 units to 3 units increasing capacity by 0.27% from 0.52% to 0.71%, remaining 0.35% below the Cornwall average.

- **Commercial yields on non-domestic property** – TBC
- **Customer views and behaviour** – No recent surveys undertaken.
- **Retailer representation** – Penzance has the second highest representation of national retailers in Cornwall.
- **Commercial rents** - TBC
- **Pedestrian flows**:

<table>
<thead>
<tr>
<th>Penzance, Market Jew St</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>Annual average</th>
</tr>
</thead>
<tbody>
<tr>
<td>counted</td>
<td>14,838</td>
<td>13,905</td>
<td></td>
<td></td>
<td>10,857</td>
</tr>
</tbody>
</table>

Source: Cornwall Council Highways (May 2013)

- **Accessibility**:

The centre contains a number of changes of levels and surfaces, restricting access for some users.

The town centre and shopping area is large and there is no true circuit for pedestrians.

- **Perception of safety/crime**:

Awaiting TCM input

- **State of town centre environmental quality**:

Awaited.
Town centre strategy - Redruth
What is the role, function and place in retail hierarchy of the town?

Redruth is an important retail centre attracting a wide catchment from the surrounding towns and villages. It sits joint sixth in the retail hierarchy (alongside Helston) for Cornwall and contains the sixth highest proportion of national retailers in Cornwall.

The town centre is nucleated, with a variety of retail unit sizes and a mix of chain and independent retailers. The vacancy rate in the centre is relatively high. There has been shrinkage in businesses in the town centre area.

The town must be taken in context with the nearby centre of Camborne within the conurbation of Camborne, Pool, Redruth and also Pool with its larger retail sheds and ambitions for additional retail growth for larger footprint retail uses.

Redruth and Camborne Town Centres provide a valuable, but currently limited retail offer. The quality of the local provision, together with the growth of retail within the surrounding areas has resulted in a low proportion of residents’ spending on ‘comparison’ (non-food) shopping being retained within CPIR. In contrast most food shopping expenditure is retained within the area, although this is still dominated by the edge of town and out of town supermarkets.

This assessment covers a 5 year period, but will be reviewed alongside the Cornwall Local Plan.

Which issues are raised by the Local Plan, Neighbourhood Plan or Town Centre Management?

Local Plan/Town Framework:

- Policy 3 (Role and Function of Places) identifies Camborne with Pool, Illogan and Redruth as suitable locations for larger scale retail development;
- Improve the quality of offer in both Redruth and Camborne town centres and focus predominantly on small multiples and independents;
- Provide different but complementary roles for Camborne, Pool and Redruth, strengthening comparison shopping in particular;

Town Centre Management:

- Prominent vacancies in the main shopping area impact on the appearance of and confidence in the centre;
- Concern regarding the potential impacts of Hayle retail developments proposed;
- Concern regarding the potential for a cinema in Pool on the future viability of the town centre cinema;
- Further investment is required in tacking buildings in a poor state of repair;
- Redruth is a quirky town with less chain stores and more individual retail offer and vintage shops;
- The quality of the architecture of the centre is high with some fine and distinctive buildings;
There is a need to change perceptions of the centre and draw on a uniqueness to attract shoppers and visitors.

**What is the vision for the future of the town Centre?**

The vision overall for the wider area is to deliver an improved and complementary retail and leisure offer within Camborne, Pool and Redruth. This is linked to the successful regeneration of the area, taking a holistic approach to new development.

Redruth will draw on its strengths as an attractive and quirky town centre to provide good day to day shopping facilities for locals as well as a strong vintage and individual shopping offer. Improvements to the centre will continue to change perceptions of the town. Redruth will continue to build on its history and fine buildings, providing opportunities for small, individual retailers to thrive.

**Potential growth in the plan period**

The redevelopment of the Redruth brewery will add retail space and there may be opportunities to reduce the size of some of the town car parks to create additional small scale retail schemes. There is a reasonable capacity for new retail space between the areas of Camborne, Pool and Redruth at the end of the plan period (2030), but it is envisaged that the larger developments may need to be concentrated at Pool, where there is greater space to do so.

**Are there opportunities for redeveloping under-utilised spaces in the town centre?**

Potential schemes:

The Redruth Action Plan Project highlights some opportunities in the car park sites and brewery for additional retail facilities. This is likely to be small scale, ensuring that sufficient car parking is retained close to the town centre.

**Should the centre be expanded to provide for additional uses or growth?**

There is no requirement for the expansion of the town centre

**In what timeframe should new retail floorspace be provided?**

The Cornwall Retail Study Update (2015) suggests that due to existing planning permissions and completed building that there is the following retail capacity remaining for Camborne, Pool and Redruth (combined):

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food retail</td>
<td>-880</td>
<td>-948</td>
<td>-188</td>
<td>642</td>
</tr>
<tr>
<td>Non-food retail</td>
<td>-7352</td>
<td>-5906</td>
<td>-3889</td>
<td>3348</td>
</tr>
</tbody>
</table>

Please note that floorspace capacity estimates are cumulative and in square metres.
Are any complementary strategies needed to enhance the town centre and help deliver the vision for its future?

- Additional consideration of how the Redruth Area Plan Project can be implemented;
- Freshening up of street furniture and signage need to be achieved;
- Reintroduction of a 30 minute tariff for parking;
- Better spin offs from the 4 festivals held in the town each year.

How can parking provision be enhanced to encourage town centre vitality?

- Car parks should reintroduce a half hour tariff to allow for short shopping trips.

Town centre health check: Note: data last updated 2013

There were 237 units identified within Redruth town centre.

A1 retail comprised of 40.9% of the towns capacity followed by professional services at 14.3% and food and drink services at 11.4%. The vacancy rate was identified as 15.6% of all town centre uses premises counted in the centre.

Analysis: Change to centre diversity in the period 2011/12 to 2012/13:

Convenience: The number of Convenience units has increased marginally by 3 units, consequently raising the sectors centre capacity from 5.53% to 6.6% but remains markedly below the Cornwall average.

Comparison: Comparison uses have increased by 9 units from 54 to 63 units, increasing centre capacity from 29.8% to 31.8%, but remains significantly below the Cornwall average by about 10%.

Service: Service uses have decreased, by 2 units from 84 to 82 units, representing an decrease in centre capacity of almost 5%. The sector remains marginally above the Cornwall average by 5.32%;

Vacant: The proportion of vacant units have slightly increased by 5 units but only marginally increasing centre capacity by about 1% and remains significantly (almost twice as high) above the Cornwall average with over 18% capacity.

Miscellaneous: The number of miscellaneous units has increased by 2 units and the centre capacity has consequently increased by 1% and is now above the Cornwall average.

- **Commercial yields on non-domestic property** – no customer information

- **Customer views and behaviour** – no current information

- **Retailer representation** - The number of major multiple retailers within Redruth town centre has increased in the past year with the inclusion of Tesco into the town centre area and now includes 4 units as shown in the
table above. Redruth currently ranks joint sixth with Helston in Cornwall’s retail hierarchy based on major national retail representation, below Bodmin and Camborne with 7 representations but above Launceston and Bude with 3 representations each.

- **Pedestrian flows:**

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>Annual average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Redruth:</td>
<td>4,356</td>
<td>7,118</td>
<td>3,983</td>
<td>3,655</td>
<td>4,778</td>
</tr>
<tr>
<td>Fore St</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Cornwall Council Highways (May 2013)

- **Accessibility:**

  Topography is difficult in places for people with reduced mobility, but no issues with wheelchair access to the town centre.

- **Perception of safety/crime:**

  The town is perceived generally to be safe. Safer Redruth and Camborne has shown crime levels to be lower than other towns.

- **State of town centre environmental quality:**

  The quality of the public realm has been greatly improved, but utility companies need to be instructed to replace surfaces appropriately after works. Poor quality replacements have reduced the overall impression of quality.

  There is an on-going issue with unsafe and derelict buildings that needs to be addressed.
Town centre strategy - Saltash

What is the role, function and place in retail hierarchy of Saltash?

Saltash is a relatively small town centre attracting a wide catchment from the surrounding towns and villages. It sits joint eighth in the retail hierarchy for Cornwall (alongside Liskeard and Hayle) based on the proportion of national retailers in the town.

The town centre is largely linear, occupying the heart of the older area of Saltash. There is a variety of retail unit sizes and a mix of chain and independent retailers. The vacancy rate in the centre is relatively low.

The town’s proximity to Plymouth has a heavy influence on the retail offer of the town, which does not reflect the size of the town’s population. Whilst the location of the town centre to the eastern side of town bounded to the north by the A38 and Saltash Tunnel approach and steep topography to the east limits future expansion of the town centre mainly to infill sites. Supermarket provision is predominantly outside of the town centre area

This assessment covers a 5 year period, but will be reviewed alongside the Cornwall Local Plan.

Which issues are raised by the Local Plan or the Neighbourhood Plan?

Neighbourhood Plan:

A Neighbourhood Plan is being prepared for Saltash, but information relating to retail approach of the plan was not available at the time of preparation.

Local Plan/Town Framework:

- Policy 3 (Role and Function of Places) identifies Saltash as suitable for retail development;
- The redevelopment of Fore Street should aim to achieve a shopping and leisure offer that meets the needs of the town;
- The regeneration of Alexandra Square and the Railway Station offer opportunities;
- The town centre should be enhanced by considering pedestrian priority and supporting public realm improvements.

What is the vision for the future of the town Centre?

Support will be given to retail uses within the town centre. Proposals for other town centre uses outside of this area will be viewed with a view to helping to secure regeneration.

Opportunities to strengthen Saltash’s town centre offer and provide new retail and leisure uses will be pursued with particular focus on appropriate design quality and heritage impacts being appropriately addressed. Some of the sites that could be suggested for redevelopment are currently used for parking
provision and this needs to be addressed carefully to ensure a good balance of accessibility and facilities.

**Potential growth in the plan period**

The grant of planning permission for a convenience and comparison goods floorspace now means that there is a small capacity for additional comparison goods space of 954 square metres after 2024 and 1012 square metres of convenience goods space after 2019. It is considered that this can be provided for through redevelopment and infill development within and adjacent to the town centre.

**Are there opportunities for redeveloping under-utilised spaces in the town centre?**

Regeneration should help improve the town centre and its surroundings. It is considered that infill proposals to improve the areas around Fore Street will provide for the retail capacity identified in the latter part of the plan period.

**Should the centre be expanded to provide for additional uses or growth?**

There is no requirement for the expansion of the town centre.

**What are the implications of:**

- **Demographic change?**
  
  Changing attitudes to town centre shopping and expectations of the town centre environment need to lead to a move away from a ‘pure’ shopping offer to a more experienced based offer with recreation and meeting places.

- **Infrastructure delivery?**
  
  No current information

- **Economic change?**
  
  No current information

**In what timeframe should new retail floorspace be provided?**

The Cornwall Retail Study Update (2015) suggests that due to existing planning permissions and completed building that there is only additional capacity for food retail space after 2019 and non-food retail space in after 2024.

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2019</th>
<th>2024</th>
<th>2030</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Food retail</strong></td>
<td>-2081</td>
<td>-99</td>
<td>365</td>
<td>954</td>
</tr>
<tr>
<td><strong>Non-food retail</strong></td>
<td>-1084</td>
<td>441</td>
<td>719</td>
<td>1012</td>
</tr>
</tbody>
</table>
Please note that floorspace capacity estimates are cumulative and in square metres. They assume that all currently committed floorspace (i.e. space with a valid planning permission will be constructed in full).

**Are any complementary strategies needed to enhance the town centre and help deliver the vision for its future?**

- Support for regeneration proposals;
- Funding for key environmental improvements to public realm would help to lift the appearance of the town centre;

**How can parking provision be enhanced to encourage town centre vitality?**

- To be discussed

**Town centre health check: Note: data last updated 2013**

- A1 retail comprised of 57.3% of the town’s capacity followed by professional services at 13.7% and food and drink services at 11.2%.
- Proportion of vacant street level property: 7.4%

**Analysis:** Change to centre diversity in the period 2011/12 to 2012/13:

**Convenience:** The number of Convenience units have increased by 3 units, increasing the sectors centre capacity by 2.45% from 7.20% to 9.65% and remains healthily above the 2011/12 Cornwall average by 1.55%.

**Comparison:** Comparison uses also increased by 5 units from 37 to 42 units. Centre capacity consequently marginally increased by 3.51% from 33.33% to 36.84% but Comparison capacity remains significantly below the Cornwall average by 3.71%.

**Service:** Service uses have increased by 5 units from 47 to 52 units. representing an increase in centre capacity of 3.27% from 42.35% to 45.62%, comfortably above the Cornwall average by 4.53%;

**Vacant:** The proportion of vacant units have significantly decreased by 10 units and translates as an up take of over 52% on previously vacant premises. The centre capacity has consequently been reduced by 9.23% from 17.12% down to 7.89% placing the capacity comfortably below the Cornwall average by 1.23%.

**Miscellaneous:** Miscellaneous uses remained static as being unrepresented in the centre.

- **Commercial yields on non-domestic property** – TBC
- **Customer views and behaviour** – No recent surveys undertaken.
• **Retailer representation** - The number of major multiple retailers within Saltash town centre remains low and Saltash currently ranks eighth in Cornwall’s retail hierarchy based on major national retail representation.

• **Commercial rents** - TBC

• **Pedestrian flows:**

<table>
<thead>
<tr>
<th>Saltash, Fore St</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>Annual average</th>
</tr>
</thead>
<tbody>
<tr>
<td>counted</td>
<td>3869</td>
<td>4992</td>
<td></td>
<td></td>
<td>4,431</td>
</tr>
</tbody>
</table>

Source: Cornwall Council Highways (May 2013)

• **Accessibility:**

Awaiting TCM input

• **Perception of safety/crime:**

Awaiting TCM input

• **State of town centre environmental quality:**

Surfacing and building maintenance within the town centre is generally good, but improvements to the public realm in terms of street furniture would create more attractive thoroughfares.