hayle harbour : : regeneration
South Quay

Development Proposal for South Quay/Foundry Yard Hayle Harbour

December 2010

Retail Planning Assessment

REAL ESTATE DEVELOPMENT

QA

Hybrid Planning Application for the Development of South Quay and Foundry Yard for Mixed Use Purposes

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1.0 INTRODUCTION

1.1 This *Retail Planning Assessment* ('RPA') has been prepared by Strategic Perspectives LLP ('SP') on behalf of ING RED UK (Hayle Harbour) Limited ('ING'). It sets out the retail planning evidence in support of a hybrid planning application for the development of South Quay and Foundry Yard for mixed use purposes. The application site is located on the edge of Foundry Town Centre in Hayle.

THE PROPOSAL

1.2 The proposal is described in more detail in **Section 3** and in other supporting planning documents*. In summary, the full planning application is seeking permission from Cornwall Council for:

- a new foodstore and small ancillary retail (Class A1) and/or restaurant and cafe (Class A3) uses on previously developed land at South Quay;
- a comparison goods (Class A1) retail scheme on the Foundry Yard site, to the south of the South Quay and Carnsew Road.
- a two-screen cinema on the southern part of South Quay.

1.3 The outline application seeks permission for residential units and a restaurant on the northern peninsular of South Quay.

1.4 The car park serving the foodstore and the rest of Hayle is located at the heart of South Quay and will be linked to Foundry Town Centre by a new pedestrian footbridge over Penpol Creek.

BACKGROUND TO THE APPLICATION

1.5 By way of background to this application, Hayle has experienced a sustained period of industrial decline since the early 20th Century, with an associated legacy of derelict sites and ailing port facilities, including South Quay. The town suffers from serious economic and social deprivation and has been a priority for strategic spatial investment and regeneration for a number of years.

1.6 This mixed use application by ING is intended to form part of the wider *Hayle Harbour Masterplan* (*LPA reference: 08/0613/P*). The proposals represent a major investment in the regeneration of a derelict and prominent 'gateway' site in Hayle. The application is also intended to act as a catalyst for the wider Harbourside Regeneration and will

* Refer to the *Planning Statement* prepared by Planning Perspectives LLP and the *Design & Access Statement* prepared by Mountford Pigott.

help to promote Hayle as an attractive and vibrant place to live, work, shop and visit for a range of uses and activities.

1.7 ING's overall vision is to create a new critical mass of shops, cafes, restaurants, homes and a cinema around the Foundry area with direct linkages to the town centre. This will result in an attractive, active and lively waterfront area during the day and evenings. This will, in turn, benefit the overall vitality and viability of Hayle through 'claw back' and 'linked trips' in accordance with national, regional and local planning policy.

1.8 The hybrid application has been guided by extensive pre-application consultations by ING with the Council and key stakeholders. This follows the withdrawal in March 2010 of the previous (December 2009) planning application for a larger foodstore and car parking on the southern part of South Quay (*LPA reference: 09/1334/ORM*).

1.9 This RPA has been prepared in accordance with national and development plan policies relating to retail development and town centre uses, along with other relevant material considerations. It specifically assesses the proposed retail floorspace against the development management policies set out in Planning Policy Statement 4 (PPS4) *Planning for Sustainable Economic Growth* relating to the sequential and impact assessments[†]. Please note that the impact of the proposals under Policy EC10 of PPS4 (including, *inter alia*, sustainability, design, accessibility, regeneration and employment considerations) are covered in detail by the supporting documents submitted with this planning application.

1.10 The ***Planning Statement*** also provides a more comprehensive description of the scheme and the key extant planning policies.

REPORT STRUCTURE

1.11 This RPA is structured as follows:

- **Section 3** provides a brief overview of the application site and the proposal.
- **Section 4** highlights the material national, regional and local planning policy.
- **Section 5** sets out the retail context for the assessment of the proposed new retail floorspace, including SP's updated appraisal of the vitality and viability of Foundry and Copperhouse town centres.

† The foodstore's primary catchment area (PCA) and the potential opportunity sites in Hayle have previously agreed with the Council for the purpose of the December 2009 planning application (LPA reference: 09/1334/ORM). It was also agreed with the Council that the impact assessment should focus on the potential implications of the proposal for the vitality and viability of Hayle's two main centres only, namely Copperhouse and Foundry. The 2009 RPA was subsequently appraised by GVA Grimley on behalf of the Council and the findings were set out in a report published in March 2010. Where relevant, this updated retail assessment also takes into account some of the main comments set out in the GVA Grimley appraisal.

- **Section 6** sets out the sequential assessment.
- **Section 7** provides our economic impact assessment of the potential trading effects of the foodstore and non-food floorspace carried out in accordance with Policy EC16.1.d of PPS4.
- **Section 8** sets out our assessment of the potential positive trading benefits of the proposed retail scheme in terms of 'claw back' and 'linked trips'. This is informed by the latest research evidence and guidance.
- **Section 9** provides our assessment of the other key (retail) impacts of the proposed scheme under Policy EC16.1 of PPS4 and briefly comments on some of the other economic development impacts that are material to the Council's assessment and determination of the proposed retail scheme under Policy EC10.2 of PPS4. Please note that these 'tests' are covered in more detail by other planning application documents, including the ***Design and Access Statement*** and ***Transport Assessment***.
- **Section 10** sets out the key conclusions to the RPA.

2.0 THE RETAIL PROPOSALS

2.1 This section provides a brief description of the application site and the proposed retail scheme. This should be read in conjunction with the *Planning Statement* prepared by Planning Perspectives.

THE APPLICATION SITE

2.2 The application site comprises the South Quay peninsular on the Hayle estuary and the adjacent Foundry Yard site to the south of South Quay and Carnsew Road. The sites are immediately adjacent to Foundry town centre, which runs parallel to South Quay on the opposite side of Penpol Creek to the east. When considered against the definitions set out in PPS4 (Annex B), both sites are classified as being in edge-of-centre locations (i.e. within 300 metres of Foundry town centre)[‡].

DEVELOPMENT PLAN ALLOCATION

2.3 The application site is covered by the 'saved' site specific **Proposal TV-D** of the development plan which identifies South Quay / Foundry Yard, North Quay and East Quay for mixed use redevelopment within Classes A1-A3, B1-B2, B8, C1, C3 and D1-D2. Proposals for new retail development on these sites should ensure that all retail and town centre uses are: *"...closely integrated with the adjacent town centre in terms of location, orientation and pedestrian movement"*. The supporting text (paragraph 7.3.115) states that in the interests of safeguarding the vitality and viability of both Hayle town centres (i.e. Foundry and Copperhouse), retail uses within any proposed scheme should be complementary and, in the case of Foundry town centre, well integrated both physically and visually.

2.4 The importance of rejuvenating Hayle Harbour is also recognised by the *Penwith Retail Study* (PRS) prepared by GVA Grimley in December 2007. This study appraised the benefits of the South Quay site for new retail development and concluded that it is:

> *"... one of the most important redevelopment sites in the whole of Penwith District and is key to the regeneration of Hayle. The existing Local Plan allocation provides an appropriate context for the mixture of uses which can be provided in the harbour area and we agree that there is clear potential to provide some retail uses as part of a wider mix. However, it is vital that the scale and type of retail uses are appropriate to the Hayle context and they are located in close proximity to the existing defined shopping area on Penpol Terrace and Foundry Square. This will ensure that the best possible opportunity*

‡ Also see Glossary at the end of this RPS.

is taken for the additional retail floorspace to provide a positive impact on the health and attractiveness of the defined shopping area in Hayle, through linked trips and spin-off benefits." (page 74)

2.5 The outline planning permission for the redevelopment of the main Quays within Hayle Harbour provides the principles and framework for the regeneration of the harbour and its environs *(LPA reference 08/0613/P)*. The retail component of the proposed scheme comprises a total retail floorspace of 13,198m^2.

2.6 The Council has therefore already accepted the development of significant new retail floorspace in Hayle Harbour from a policy and regeneration standpoint. At the time ING indicated that detailed planning applications would be brought forward for the various elements based upon prioritising the areas according to the regeneration needs and market opportunity. This application therefore reflects the priority placed by ING on the delivery of a commercially viable development for South Quay and Foundry Yard, which will act as a 'catalyst' for the wider masterplan.

THE SOUTH QUAY FOODSTORE PROPOSAL & ANCILLARY USES

2.7 In preparing the revised application for South Quay, ING has listened and responded to the Council and key stakeholders on the previous application. The detailed changes to the scale, layout and design of the proposed foodstore are set out in more detail in the ***Design and Access Statement***.

2.8 The retail application on South Quay peninsular is for a foodstore with a total sales area of 2,550m^2 net. As the table shows, this sales area is lower than the (withdrawn) December 2009 application (*LPA ref: 09/1334/ORM*) and has been guided by ING's discussions with the Council and key stakeholders. ING has therefore demonstrated significant *"flexibility"* in terms of the scale, design and layout of the proposed store, in accordance with PPS4 (Policy EC15.1.d).

Table 2.1 South Quay Foodstore: Proposed Sales Area

	December 2009 Application	2010 Revised Application
Sales Area (net m^2)	**3,159**	**2,550**
Food sales (net m^2):	2,053 (65%)	1,658 (65%)
Non-Food sales (net m^2):	1,106 (35%)	892 (35%)

2.9 The proposed store's sales area will comprise 1,658m^2 net of convenience goods and 892m^2 net of non-food retailing.

2.10 The store and car park will benefit from vehicular access off Carnsew Road by means of a new roundabout. This roundabout will serve both the foodstore to the north of the application site and the non-food retail scheme to the south. Please note that no petrol filling station (PFS) is planned, either now or in the future. This represents further *"flexibility"* on the part of ING, as a number of the larger superstores outside of Hayle are served by a PFS. A PFS is also generally regarded as a standard part of a superstore's offer by the main grocery operators.

2.11 The foodstore is planned to significantly improve the local population's access to fresh food and other products efficiently *"under one roof"*. It will cater for a wide range of food lines. This will be complemented by a relatively small quantum and range of comparison goods sales to enable it to compete *"like for like"* with other competing foodstores outside the PCA and help maximise the potential for the 'claw back' of shoppers and expenditure.

2.12 The rest of the application site on South Quay will comprise two small ancillary units with a total Gross Internal Area (GIA) of 407m^2. These will have the potential to accommodate either Class A1 (retail) or Class A3 (restaurant or cafe) uses. A cinema is also proposed for South Quay to meet the need identified for Hayle and it will have a total GIA of 433m^2.

2.13 Collectively the size and function of the proposed foodstore, together with the product range, facilities and services on offer in the store, are designed to meet the main ('bulk') food shopping needs of residents in Hayle. This responds to the survey evidence and the findings of the 2007 PRS, which identified that local people currently have to travel longer distances by car to out-of-centre foodstores outside of Hayle to satisfy their requirements. It will also provide a more sustainable opportunity for 'linked' ('combined') trips for people visiting Hayle's main town centres. The proposal will therefore be particularly attractive, convenient and beneficial to local residents, including the elderly, disabled and mothers with children, as well as for workers, tourists and visitors to Hayle.

THE FOUNDRY YARD PROPOSAL

2.14 The application on Foundry Yard is for three 'Class A1' comparison goods retail units with a total GIA of 1,993m^2, including 785m^2 of mezzanine space. For the purpose of our retail assessment we have assumed that the mezzanine floors will also be used for retail sales rather than for storage, office space and/or other uses. However, the Council should be made aware that this may overstate the sales area of the proposed non-food retail floorspace.

CAR PARKING & ACCESSIBILITY

2.15 The foodstore will be served by 276 car parking spaces, incorporating 16 disabled spaces and 16 parent and child spaces. The retail scheme proposed for Foundry Yard Car Park will be served by 43 car parking spaces, of which four spaces will be set aside for disabled parking.

2.16 The planned car parking provision will benefit the wider town centre and Hayle as a whole, particularly in terms of attracting and retaining shoppers and visitors. In turn, this will also maximise the potential for 'linked' ('combined') trips with other shops, businesses, facilities and attractions.

2.17 The proposed foodstore and non-food retail floorspace will also be highly accessible by a variety of modes of travel. Both schemes will be fully integrated with existing public transport and pedestrian infrastructure provision, thereby enabling visitors to take advantage of sustainable transport modes. Furthermore, the application site is within easy walking distance of Hayle's railway station and the urban population.

2.18 Please note that the transport and highway issues material to the assessment of the planning application are set out in more detail in the ***Transport Assessment*** prepared by Savell Bird & Axon.

RETAIL OPERATORS

2.19 Although the proposed foodstore and non-food retail scheme do not have named operators at the planning application stage, the retail units have been designed to meet the needs of modern retailers in terms of their layout, floor area, servicing arrangements and car parking provision.

2.20 Savills, the retail agent acting on behalf of ING RED UK (Hayle Harbour) Limited, has identified requirements from all the country's major food retailers for representation in Hayle. Currently Sainsbury's and Asda are proposing much larger superstores on out-of-centre sites fronting the A30, opposite the West Cornwall Retail Park and the Rugby Club respectively. The third proposal is for a Morrison's store on the Jewson site, to the west of South Quay. Although defined as being edge of centre, this site is located further away from Foundry Town Centre than South Quay. We assess the suitability, viability and availability of the Jewson site in our sequential assessment set out in **Section 6**.

2.21 Savills has advised ING that they would expect Sainsbury's, Asda and Morrisons to consider South Quay as an alternative location for a new foodstore in the event that planning is not granted on their preferred sites, along with Waitrose and Tesco.

3.0 PLANNING POLICY CONTEXT

3.1 Section 38(6) of the *Planning and Compulsory Purchase Act 2004* requires that proposals be determined in accordance with the development plan unless material considerations indicate otherwise. This section provides a brief overview and update of the development plan policies material to the assessment and determination of the application', along with a more detailed overview of PPS4. Please note that the extant and emerging development plan policies are also covered by the ***Planning Statement*** prepared by Planning Perspectives LLP.

NATIONAL PLANNING POLICY

3.2 PPS1: *Delivering Sustainable Development* sets out the Government's overarching objectives and policies for the delivery of sustainable development through the planning system. This is the core principle underpinning planning. At the heart of sustainable development is the aim to ensure a better quality of life for everyone. The Government is committed to promoting a strong and productive economy that aims to bring jobs and prosperity for all. The emphasis is on Local Planning Authorities (LPAs) to ensure that suitable locations are available for retail, industrial, commercial and other uses so that economies can prosper. PPS1 specifically refers to the promotion of new retail developments in existing town centres to promote their vitality and viability, social inclusion and more sustainable patterns of development.

3.3 PPS4: *Planning for Sustainable Economic Growth* was published in December 2009 and was prepared in the context of PPS1 and other national planning policy statements[§]. It sets out the Government's policies for all economic development and main town centre uses, including retail development. The aim is for the planning system to contribute to building prosperous economies by, amongst other objectives, improving the economic performance of places; delivering sustainable patterns of development; and promoting the vitality and viability of town centres.

3.4 PPS4 sets out policies that are intended to clarify the Government's approach and support for town centres. It is based on 19 policies organised around the following key planning processes: using evidence to plan positively (Policy EC1); plan making (Policies EC2 – EC8); monitoring (Policy EC9); and development management (Policies EC10 – EC19).

§ PPS4 replaces and consolidates other policy statements including, inter alia, PPS6 Planning for Town Centres; PPG5 Simplified Planning Zones; the economic development elements of PPS7 Sustainable Development in Rural Areas; and paragraphs 53-54 and Annex D of PPG13: Transport relating to maximum parking standards. PPS4 does not apply to residential development, as this is covered by PPS3: Housing.

3.5 The PPS4 *Town Centre Practice Guidance on Need, Impact and the Sequential Approach* is also intended to help practitioners interpret and implement policy. However it is important to note that this guidance does not constitute a statement of Government policy, nor does it seek to prescribe a standard methodology or approach for carrying out sequential and impact assessments.

3.6 The following provides an overview of the policies in PPS4 that are relevant to the assessment and determination of this application.

Preparing a Robust Evidence Base

3.7 To help underpin plan-making and the assessment of planning applications, PPS4 places significant weight on the need for regions and local authorities to work together to prepare and maintain a robust evidence base (Policy EC1), as well as to continually monitor the impact of policies and planning applications on centres (Policy EC9).

3.8 At the local level, Policy EC1.3 advises that the evidence base should, *inter alia*, assess the detailed need for land or floorspace for economic development, including for all main town centre uses over the plan period; identify any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs; and assess the capacity of existing centres to accommodate new town centre development, taking account of the role of centres in the hierarchy and identifying centres in decline where change needs to be managed.

3.9 Policy EC9 advises that health check assessments are an important 'tool' for both plan making and the consideration of planning applications. For example, health checks can help to inform judgements about the extent and significance of any potential impacts of planning applications (EC17.3). Annex D to PPS4 sets out the 13 health check vitality and viability key performance indicators (KPIs).

Planning for Centres

3.10 The Government's planning policy guidance and statements since the mid-1990s have consistently set out their commitment to focus new development and investment in town centres 'first'. This requires balancing the priority for focussing new economic growth and development of main town centre uses in existing centres, with the other key aims of promoting competition, enhancing consumer choice and conserving the heritage of centres.

3.11 To help achieve the Government's town centre first policy, the emphasis is very much on LPAs to adopt positive, proactive and flexible approaches to planning for sustainable economic growth (Policy EC2) and for town centres (Policy EC3). Integral to this is the need for a clear economic vision and strategy for areas and centres that positively and proactively encourages sustainable economic growth (EC2.1.a).

3.12 Policy EC3.1(a-h) specifically states that RPBs and LPAs should prepare strategies that take account of a range of factors. These include, *inter alia*, the need to set flexible policies for centres which are able to respond to changing economic circumstances and encourage, where appropriate, high-density development accessible by public transport, walking and cycling. Strategies should also define a network (the pattern of provision of centres) and hierarchy (the role and relationship of centres in the network) of centres that is resilient to anticipated future economic changes, to meet the needs of their catchments. This will involve making choices about which centres will accommodate any identified need for growth in town centre uses; and considering the expansion of centres where necessary. Where extensions are proposed, these should be carefully integrated with the existing centre in terms of design and the need to allow easy pedestrian access.

Promoting Choice & Competition

3.13 Policy EC4 also reinforces the Government's key policy objectives of promoting choice and competition. It specifically sets out some of the issues which should be taken into account in preparing and evaluating alternative town centre strategies and translating these into the LDF. For example, PPS4 (EC4.1.a-f) states that LPAs should, *inter alia*, support a diverse range of uses which appeal to a wide range of age and social groups, ensuring that these are distributed throughout the centre; plan for a strong retail mix so that the range and quality of the comparison and convenience retail offer meets the requirements of the local catchment area; identify sites in the centre, or failing that on the edge of the centre, capable of accommodating larger format developments (where a need for such development has been identified); and take measures to conserve and, where appropriate, enhance the established character and diversity of their town centres.

'Need' Assessment

3.14 PPS4 has removed 'need' as a "standalone" test for the assessment and determination of planning applications for retail, leisure and main town centre uses. Notwithstanding this, 'need' assessments remain material to plan-making (Policy EC1.4) and the development of robust town centre strategies (Policy EC3). Specifically, the assessment of 'need' helps to inform the allocation of an appropriate range of sites to accommodate the forecast capacity for different type of retail floorspace and town centre uses (Policy EC5.1.a). Furthermore, the assessment of future expenditure capacity should also be taken into account when assessing proposals under the sequential and impact tests (see below).

Sequential Assessment

3.15 The sequential test remains at the 'heart' of the Government's objective to focus new development and investment in town centres 'first' policy. It is a fundamental part of both plan making (Policy EC5) and the determination of planning applications (Policy EC15). Under the sequential approach (Policy EC5.2), LPAs are required to identify sites that are suitable, available and viable in the following order:

- locations in appropriate **existing centres**, where sites or buildings for conversion are, or are likely to become, available within the plan period;
- **edge-of-centre locations**, with preference given to sites that are, or will be well connected to the centre; and
- **out-of-centre sites**, with preference given to sites which are, or will be well served by a choice of means of transport and that are closest to the centre and have a higher likelihood of forming links with the centre

3.16 PPS4 (EC5.1) indicates that LPAs should identify and allocate an appropriate range of sites to accommodate the identified need, ensuring that sites are capable of accommodating different business models in terms of scale, format, car parking provision and scope for "disaggregation". Having identified sites for development, Policy EC5.5 states that LPAs should allocate sufficient sites in development plan documents to meet at least the first five years identified need.

3.17 The sequential assessment is also critical to the determination of planning applications that are not in an existing centre and not in accordance with an up to date development plan (Policy EC15). Under PPS4, both LPAs and applicants are required be realistic when assessing the suitability, viability and availability of potential sites. This requires demonstrating *"flexibility"* in terms of the scale and format of the proposal; car parking provision; and the scope for *"disaggregation"*. PPS4 confirms that is does not expect a single retailer or leisure operator to split development into separate sites where flexibility in the business model and the scope for disaggregation have been demonstrated.

3.18 We assess the application against the sequential test in more detail in **Section 6**.

Impact Assessment

3.19 Policy EC14.4 requires impact assessments to be carried out for retail and leisure development (and proposals for other main town centre uses) over 2,500m^2 gross.

3.20 Planning applications for retailing and main town centre uses that are not in a centre and not in accordance with an up to date development plan should be assessed against the following six key inter-related impact test under Policy EC16.1, focusing in particular on the first five years after the implementation of a proposal (i.e. after the scheme has opened):

a. The impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal.

b. The impact of the proposal on town centre vitality and viability, including local consumer choice and the range and quality of the comparison and convenience retail offer.

c. The impact of the proposal on allocated sites outside town centres being developed in accordance with the development plan.

d. In the context of a retail or leisure proposal, the impact of the proposal on in-centre trade/turnover and on trade in the wider area, taking account of current and future consumer expenditure capacity in the catchment area up to five years from the time the application is made and, where applicable, on the rural economy.

e. If located in or on the edge of a town centre, whether the proposal is of an appropriate scale (in terms of gross floorspace) in relation to the size of the centre and its role in the hierarchy of centres.

f. Any other locally important impacts on centres defined by LPAs under Policy EC3.1.e).

3.21 We assess the applications against the key (retail) impact tests in **Section 7-9**.

3.22 Policy EC10.2 also identifies the following five wider economic development impact considerations that all applications for economic development, including retail, should be assessed against:

a. the effect on carbon dioxide emissions and climate change over the lifetime of the development;

b. the accessibility of the proposal by a choice of means of transport and the effect on local traffic levels and congestion after public transport and traffic management issues have been secured;

c. whether the proposal secures a high quality and inclusive design, which takes the opportunities available for improving the character and quality of the area and the way it functions;

d. the impact on economic and physical regeneration in the area, including the impact on deprived areas and social inclusion objectives; and

e. the impact on local employment.

3.23 The wider sustainability, design and traffic/ accessibility impact considerations are covered in detail by the supporting documents submitted with this planning application, including the ***Design & Access Statement***. Notwithstanding this, we briefly comment on the impact of the application against Policies EC10.2.d and EC10.2.e in **Section 9**.

Determining Planning Applications

3.24 Policy EC10.1 states that LPAs should adopt a positive and constructive approach towards planning applications for economic development, including retail, and applications that secure sustainable economic growth should be treated favourably.

3.25 Under Policy EC17.1 applications for retail and town centre uses should be refused planning permission where:

a. the applicant has not demonstrated compliance with the sequential approach (Policy EC15); or

b. there is clear evidence that the proposal is likely to lead to *'significant adverse impacts'* in terms of any one of the impacts set out in Policy EC10.2 and EC16.1, taking account of the likely cumulative effect of recent permissions, developments under construction and completed developments.

3.26 Policy EC17.2 indicates that where no *'significant adverse impacts'* have been identified under Policies EC10.2 and 16.1, then planning applications should be determined by taking account of the positive and negative impacts of the proposal in terms of Policies EC10.2 and 16.1 and any other material considerations; and the likely cumulative effect of recent permissions, developments under construction and completed developments.

3.27 It is still therefore for the decision maker to judge the extent to which the applicant has demonstrated compliance with the sequential approach, and what constitutes a *'significant adverse impact'*, based on the circumstances of each case. Where the evidence shows there is no *'significant adverse impact'* it will be necessary to balance the positive and negative effects of proposals against the criteria set out in Policies EC10.2 and EC16.1, together with any other local considerations and other wider material considerations in reaching an overall planning judgement.

3.28 Policy EC17.3 states that judgements about the extent and significance of any impacts should be informed by the development plan (where this is up to date); along with recent centre health check assessments, based on the vitality and viability indicators set out in Annex D to PPS4; and any other published local information (such as a town centre or retail strategy).

REGIONAL PLANNING POLICY CONTEXT

3.29 The future of regional planning and its relevance to the determination of planning applications is uncertain. In July 2010 the Secretary of State for Communities and Local Government confirmed in a letter to all the Chief Planning Officers in England that Regional Strategies had officially been revoked by the Coalition Government under s79(6) of the *Local Democracy Economic Development and Construction Act 2009* and no longer formed part of the development plan for the purposes of Section 38(6).

3.30 However, a recent High Court decision issued on 10th November 2010 has placed a temporary block on the scrapping of Regional Strategies. Immediately after this judgment the government stated that the decision *"changed very little"* and DCLG's Chief Planner sent a letter to all local planning authorities in England advising them that they should still have regard to the Secretary of State's earlier letter in any decisions they are currently taking. Notwithstanding this, we understand that a legal hearing will be conducted into the lawfulness of the Secretary of State's statement and the Chief Planner's advice. Until the outcome of that hearing is announced, decision makers should have also have regard to Regional Strategies as part of the statutory development plan.

3.31 In this case the statutory plan is the *Regional Planning Guidance for the South West* (RPG 10) adopted in September 2001. This is to be replaced by the Regional Spatial Strategy (RSS) for the South West, which was published for consultation in June 2006 and sets out a strategic plan for the period to 2026. Depending on the outcome of the legal hearing, the key extant and draft regional policies relevant to the assessment of this application include, *inter alia*:

- **Policy EC6** '*Town Centres and Retailing'* encourages a distribution of retailing that minimises the lengths and frequency of trips, so that any settlement of reasonable size has access to all normal day-to-day necessities. However this policy pre-dates PPS4 (and also the superseded PPS6).
- **Policy TC1** *'City and Town Centres'* of the draft RSS seeks to ensure that the vitality and viability of the region's existing network of city and town centres is maintained and enhanced. The objective is to provide new retail and other town centre uses in sustainable locations *"in step with"* the needs generated by economic and population growth.

3.32 The Cornwall Structure Plan (**Policy 14**) also states that priority will be given to the improvement and enhancement of town centres in providing shopping, office and leisure facilities to meet the needs and aspirations of the whole community. New retail and town centre uses should be in or adjoining town centres where they can help sustain the centre's vitality and viability; contribute to the improvement of the town centre environment; and are accessible to all sectors of the community by choice of means of transport. Although Hayle is not specifically mentioned by the emerging RSS[**], the adopted Cornwall Structure Plan (paragraph 139) does identify Hayle as an *'Other Main Town Centre'* that has the capacity to meet the needs of the surrounding area, as well as its own population.

LOCAL PLAN POLICY CONTEXT

3.33 The Planning and Compulsory Purchase Act 2004 introduced the Local Development Framework (LDF), which will eventually replace the Local Plan under Section 38(6) of the 2004 Act. In the meantime, the extant statutory development plan is the adopted

** Penwith District Council made representations to the RSS Examination Panel to promote Hayle within Development Policy B. This states that the scale and mix of developments should increase self containment of the places identified; develop their function as service centres; and secure targeted development which can address regeneration needs.

Penwith District Local Plan (adopted in February 2004), although it was prepared prior to the publication of PPS4 (and also the superseded PPS6).

Penwith District Local Plan (2004)

3.34 The 'saved' policies of relevance to the assessment of this application include, *inter alia*:

- **Policy TV-1** seeks to focus new development in the District's major town centres (including Hayle) and maximise the use of previously developed land. Proposals for development in or on the edge of settlements should be will integrated into the form of the settlement; not have an adverse effect on areas of amenity, recreational or wider environmental value; and be of a scale and design which is in keeping with the character of the settlement.
- **Policy TV-17** specifically states that proposals for shopping facilities in edge-of-centre and out-of-centre locations will not be permitted unless they are in accordance with the sequential approach; there is a need for the proposed development; and it will not harm the vitality and viability of any town centre. As described above, following the publication of PPS4 the assessment of 'need' is no longer part of the development control process.
- **Proposal TV-D** also allocates the application site (i.e. South Quay / Foundry Yard) and wider area (i.e. including North Quay and East Quay) for redevelopment for a wide range of uses, including Classes A1, A2 and A3. Amongst other requirements, this proposal states that town centre uses will need to be closely integrated with the adjacent town centres in terms of location, orientation and pedestrian movement; and be of a scale and design that respects the maritime environment and heritage of these prominent locations in the harbour (also see ***Section 2*** of this RPA),

Local Development Framework (LDF)

3.35 From the 1st April 2009, the six District Councils in Cornwall (including Penwith District Council) and the County Council become a unitary authority ('Cornwall Council'). The Cornwall LDF is currently being prepared and the public consultation on the *Core Strategy Issues and Options* document is scheduled to take place towards the end of 2010.

3.36 Prior to the formation of the unitary authority Penwith District Council had made progress on its own Local Development Framework. This included consultation on its Core Strategy Preferred Options document (published in February 2008) and the Hayle Area Action Plan (Issues and Options). We understand that these are likely to be taken forward by the Cornwall LDF in due course. They are therefore a material consideration for development control purposes; although they can be afforded only limited weight as none of the LDF documents have been adopted.

3.37 The relevant policy options in the Core Strategy Preferred Options Document include, *inter alia*, **Option CS15** (*'Town Centres & Retail'*) which seeks to maintain and improve the role and function of Penzance, St Ives and Hayle; increase the retail provision in Hayle; and encourage development proposals for main town centre uses which seek to improve the vitality, viability and character of town centres.

3.38 Draft **Area Action** Plans (AAPs) were also prepared by Penwith District Council as an alternative to the Site Specific Allocation (SSA) DPDs and (once adopted) would have replaced the site specific policies identified on the proposals map in the Penwith Local Plan. The Council's AAP for Hayle was progressed to consultation stage and the findings were presented to Penwith District's Committee on 30th July 2008. One of the 13 draft objectives of the Hayle AAP is to ensure that as regeneration and growth progresses, Hayle ensures its viability by: *"...increasing its attraction and effectiveness as a vital cultural and prime shopping, entertainment and leisure destination that provides for the needs of the community and visitors through the promotion of appropriate development in suitable accessible locations"*. However, work was subsequently halted following the formation of the Cornwall unitary authority. We understand that the Hayle AAP will now form part of the Cornwall LDF.

3.39 As part of the preparation of the Cornwall *Core Strategy Issues and Options* a set of papers are being prepared to help identify the key spatial planning issues that should be addressed. These papers are 'living' documents and will be updated as necessary when significant new issues, policy guidance or legislation arise. There are two sets of papers - 21 topic based papers (including one on retail and town centres) and 19 place-based issues papers (including for Hayle and St Ives)[††].

OTHER MATERIAL CONSIDERATIONS

Penwith Retail Study (2007)

3.40 The 2007 *Penwith Retail Study* (2007 PRS) was prepared for the District Council by GVA Grimley. The study provides the evidence base to help inform the production of the Council's LDF and the determination of planning applications. It is therefore material to the assessment of ING's application.

3.41 The 2007 PRS specifically identifies that Hayle has experienced significant industrial decline since the early 20th Century. As a consequence the PRS states that the town: *"... now suffers from serious economic and social deprivation and is a priority for*

†† These can be found on the Council's website (http://www.cornwall.gov.uk/default.aspx?page=22887).

strategic spatial investment". In response it identifies that the:*"...future of the harbour area will be the key driver for the regeneration of Hayle"* (paragraph 4.47).

3.42 Amongst its key outputs the study comprised a review of the vitality and viability of the three main town centres in the District (i.e. Hayle, Penzance and St Ives) and an assessment of the qualitative and quantitative need for new comparison and convenience goods retail floorspace over the forecast period up to 2021 (with a broad overview to 2026)[‡‡]. As described above, although PPS4 has removed 'need' as a "standalone" test for the assessment and determination of planning applications for retail and other main town centre uses, it is still material to plan-making at the regional and local level.

3.43 Against this policy background it is therefore relevant to consider the key findings of the capacity assessment carried out as part of the 2007 PRS. The study tested two policy options drawing on the base year market shares derived from the household survey conducted in April/May 2007[§§]. Plan 1 (**Appendix 1**) reproduces the study zones defined for the household survey based on postcode geography.

3.44 The **'baseline'** capacity assessment assumed constant market shares over the forecast period. In other words the 'status quo' was maintained and no account was taken of the potential need for and impact of new retail floorspace development on market shares. The table below summarises the 'baseline' position for both convenience and comparison goods retailing.

Table 3.1 Hayle 'Baseline' Capacity Forecasts (constant market shares)

net m^2	2012	2016	2021	2026
Convenience Goods	680	760	860	960
Comparison Goods	105	560	1,220	1,820

Source: Penwith Retail Study (2007). Appendix D.

3.45 The study concluded that in terms of a *'strategy response'*, Hayle is the settlement within Penwith which is *"...most in need of a step change in retail provision and shopping patterns behaviour"* (paragraph 7.9).

3.46 As a result, a **'revised market share'** approach was recommended to help stem the 'leakage' of shoppers from Hayle and retain larger amounts of convenience and comparison expenditure within the town. This approach assumed an increase in

‡‡ see Appendix 6 to this RPA for a summary of the key assumptions, forecasts and outputs of the PRS quantitative need assessment

§§ The market shares were adjusted manually by GVA Grimley at 2012 to reflect the potential impact of the new Marks & Spencer store at West Cornwall Retail Park on both comparison and convenience good shopping patterns.

Hayle's 'retention' of convenience goods to 70%, with a more limited increase in the 'retention' of comparison goods expenditure. The table below sets out the results of the 'revised market share' approach.

Table 3.2 Hayle 'revised' capacity forecasts (2012 – 2021)

net m^2	2012	2016	2021
Convenience Goods	1,500	1,600	1,750
Comparison Goods	2,200	2,900	4,000

Source: Penwith Retail Study (2007). Appendix D.

3.47 ING's planning application is for a foodstore with a convenience goods sales area of 1,658m^2 net. This is slightly higher than the capacity identified for 2016, but is wholly supported by the 2021 forecast.

3.48 In terms of the comparison goods capacity, the total proposed non-food sales area of the foodstore and ancillary retail on South Quay, along with the retail units on the Foundry Yard site, will be 2,413m^2 net[***]. Based on the PRS there is therefore sufficient capacity to support the proposed non-food retail floorspace.

3.49 In order to accommodate the level of need identified, the study concludes that the harbour area is *"...the most appropriate opportunity, in line with the existing Penwith Local Plan allocation"* (paragraph 7.9). This is subject to the proviso that retail provision is integrated with the existing Foundry centre. The study also highlights the fact that Hayle has a *"unique challenge"* of two defined town centres of equal status and it is vital, therefore, that any proposals in the harbour also ensure that the health of the Copperhouse area is not damaged.

3.50 Finally the PRS concludes that out-of-centre development should be:

> *"...carefully considered and prevented if it is shown that they could soak up significant amounts of identified capacity and/or harm opportunities for town centre redevelopment/expansion. We do not consider there is currently a need for future out-of-centre retail allocations in Penwith, particularly given the opportunities presented by a range of potential (re)development sites within and on the edge of the main town centres. Nevertheless, the Council (along with potential applicants) will need to apply flexibility and realism when assessing the locational characteristics of retail warehouse proposals, particularly in the more historic centres. Should, through future planning applications, there be a proven*

*** please note that this may overstate the total non-food sales area as it assumes that the mezzanine floors in the Foundry scheme will be used for retail sales and the two ancillary retail units on South Quay will also be occupied by non-food retailers *need for additional retail warehouse floorspace (which can't be provided for in the town centre) then the District Council will need to consider the most appropriate location for this provision. It appears logical and sustainable that the starting point for such an assessment will be consider locating new uses immediately adjacent to existing retail warehouse provision and to seek improvements to public transport accessibility."*

3.51 In terms of other material considerations, we understand that the *Cornwall Retail Study* is currently being prepared by GVA Grimley on behalf of Cornwall Council. However, this study had not been published at the time of preparing our RPA. Notwithstanding this, we have purchased the County-wide household telephone interview survey that informs this study from the Council. This will help to inform our assessment of shopping patterns and market shares for Hayle and the wider area, specifically for comparison goods retailing. We describe the key findings of the Cornwall-wide survey in more detail in **Section 4**. A plan showing the study area and survey zones is set out in **Appendix 1**.

SUMMARY

3.52 The application site is located in an edge-of-centre location and is highly accessible by all modes of travel. The site is allocated under adopted Local Plan **Proposal TV-D** for a mix of uses, including substantial new Class A1 retail floorspace. The policy direction is for new development to be closely integrated with Foundry town centre in terms of location, orientation and pedestrian movement.

3.53 Notwithstanding the fact that the Council has already accepted the principle of Class A1 retail on the application site, a foodstore has not specifically been identified or allocated. Therefore, in order to provide a robust and transparent assessment, we have considered the proposed foodstore and non-food retail scheme against the key sequential and impact considerations, in compliance with PPS4.

4.0 THE RETAIL CONTEXT

4.1 This section briefly describes the current role, attraction and performance of Hayle as a shopping location. Hayle is unusual in that it has two defined town centres. We have therefore carried out a health check analysis of these centres in accordance with the key performance indicators (KPIs) identified by PPS4 (Annex D), where available[†††]. We have also identified the shopping patterns and expenditure flows for both convenience and comparison goods retailing based on the findings of the household telephone interview surveys conducted since 2007.

TOWN CENTRE HEALTH CHECK ASSESSMENT

4.2 Our updated health check assessments for both Foundry and Copperhouse town centres are set out in more detail in **Appendix 2**. The following summarises the key findings.

Foundry Town Centre

4.3 Foundry town centre's main shops and services are situated along Penpol Terrace opposite South Quay. The presence of Penpol Creek and the harbour frontage along Penpol Terrace provide an attractive backdrop to the centre, albeit that it would benefit from further improvements to its overall environment and public realm.

4.4 The centre comprises some 47 shops and service businesses (excluding Pratt's Market). For a centre of its size it benefits from a good choice of national multiple operators, including Spar, Boots, Martin's (newsagents and post office), Lloyds TSB and Barclays. Pratt's Shopping Arcade also provides an interesting mix of smaller specialist retailers and services that contribute to the centre's overall attraction.

4.5 Foundry town centre is not anchored by a major food retailer. The smaller multiple convenience stores (i.e. Spar and Martin's) and the local independent butchers and bakers primarily function as 'top-up' food shopping destinations meeting the *'day to day'* needs of local Hayle residents.

4.6 Foundry benefits from its wider service offer including banks, cafes, restaurants and public houses that all help to generate frequent trips, as well as attracting passing car-borne trade and visitors. Hayle's wider attractions, including the harbour and beach, attract visitors and tourists to the town throughout the year.

††† Please note that for smaller town centres such as Copperhouse and Foundry detailed information on commercial rental values, yields, footfall and other KPIs is not readily available.

4.7 Foundry also benefits from the footfall and 'spin off' expenditure generated by people walking to and from the nearby train station.

4.8 Our health check assessment has found that Foundry is an attractive, vital and viable town centre. It has a relatively good range and choice of shops, service businesses and wider attractions. Vacancy levels are below the national average and we have recorded good footfall levels during the course of our various visits to the centre. This update confirms the overall findings of the 2007 PRS prepared for the Council.

Copperhouse Town Centre

4.9 Copperhouse has a more comprehensive and wide-ranging retail offer than Foundry town centre. Its main shops and uses are located along Fore Street, Market Square and Copper Terrace. Our audit indicated that there are some 53 retail and service business in the town centre, predominantly with frontages along Fore Street.

4.10 The centre's shops and facilities include a complementary mix of national multiple and independent retailers, anchored by the medium-sized Co-op supermarket at the eastern end of Fore Street. The Co-op is the only major foodstore in either town centre and comprises a sales area of 995m^2 net. However, the range and depth of its food offer is more limited when compared with other major competing out-of-centre foodstores outside the PCA.

4.11 Apart from the Co-op the centre's wider food and convenience goods offer also includes a Premier store, a baker, butcher, chemist and newsagents. These smaller convenience stores primarily serve the more frequent 'day-to-day' needs of the local resident population in the western part of Hayle. Other key service businesses and attractions include the post office, a bank, estate agents and a mix of places to eat and drink. This diverse range of other uses and activities also help to draw local residents and visitors to the centre.

4.12 Based on the key performance indicators and our audits of Copperhouse conducted over some 12-18 months, it is clear that the town centre is both vital and viable. It has a strong retail and service offer, limited vacancies and an attractive shopping environment that mainly appeals to local residents in Hayle, as well as visitors and tourists to the centre and wider area.

OTHER SHOPPING FACILITIES

4.13 Hayle's out-of-centre foodstore provision is substantial for a centre of its size. It comprises a recently extended Lidl 'deep discounter' foodstore on Carwin Rise and a Marks & Spencer foodhall that forms part of the larger M&S store on the West Cornwall Shopping Park, adjacent to the A30. Overall we estimate that almost two-thirds (65%) of the convenience goods floorspace in Hayle is located <u>outside</u> the town centre.

4.14 None of the 'top 5' major grocery retailers are currently represented in Hayle. As a result there are no superstores that can specifically meet the main ('bulk') food shopping needs of the local resident population.

4.15 However, as described in **Section 2**, all the main grocery operators have requirements for representation in the area (apart from Waitrose and Tesco). Both Sainsbury's and Asda currently have proposals for large superstores outside the town centre and Morrisons has also recently submitted an application for a store on the Jewson site, immediately adjacent to the South Quay application site.

4.16 In the St Ives area (Zone 2) the foodstore provision is dominated by the out-of-centre Tesco supermarket in Carbis Bay, which is located on the main road between St Ives and Hayle. The store sells a wide range of pre-packaged, fresh, refrigerated and frozen grocery goods, as well as newspapers, magazines and alcohol. We have visited the store on different occasions and it has always appeared to be extremely busy, often with queuing at the check-outs. This out-of-centre Tesco is a popular foodstore, mainly serving the 'bulk' food needs of car-borne shoppers, as well as providing an in-store coffee shop. Although the 2006 survey evidence used to inform the 2007 PRS does not appear to support the strong trading performance of the store, GVA Grimley concluded that: *"...the results of the household survey may be under-estimating the actual turnover"* (paragraph 5.18).

4.17 The smaller convenience goods stores in St Ives comprise two Co-op stores at Royal Square and Tregenna Place. These convenience stores mainly serve the 'top-up' shopping needs of the town's local catchment population, as well as visitors to the centre and wider area. Outside the defined town centre there is a small Co-op store at The Stennack.

4.18 There are a number of larger out-of-centre superstores that draw shoppers from the Hayle area for car-borne main 'bulk' food shopping purchases on a regular weekly or fortnightly basis. These include, *inter alia*:

- **Penzance** – the out-of-centre Tesco at Branwell Lane and Morrisons at Long Rock Business Park sell a wide range of goods with extensive car parking. In addition there is a Lidl 'deep discounter' and a small Co-op (488m^2 net) at Wherrytown.
- **Camborne** – the Tesco at Wesley Street.
- **Pool** – The Tesco Extra off Station Road in Pool/ Redruth and the Morrisons at Agar Road.

4.19 The West Cornwall Shopping Park is located outside of Hayle's urban area to the east, adjacent to the A30. The retail park comprises Boots, Next and Marks & Spencer (which includes a foodhall). The 2007 PRS does not provide a detailed commentary on the overall attraction and trading performance of the West Cornwall Retail Park, as the household survey was conducted prior to the M&S opening.

SHOPPING PATTERNS (2007 – 2010)

4.20 Our broad overview of the changes in food and non-food shopping patterns since 2007 is based on the surveys conducted for the following retail studies.

- The *Penwith Retail Study* (PRS) was informed by a household telephone interview survey conducted in April 2007 of some 800 households across a wide geographic area. The study area is reproduced in **Appendix 1** and comprises eight zones.
- White Young Green (WYG) commissioned a household survey in May 2009 to help inform the Retail Assessment in support of a proposal for a Sainsbury's foodstore on an out-of-centre site adjacent to the West Cornwall Shopping Park at Marsh Lane. WYG adopted the same study area and eight sub-zones as the 2007 PRS, but more households were interviewed (1,000 in total).
- GVA Grimley has also recently carried out a county-wide household telephone interview survey for Cornwall Council to help inform the preparation of the Cornwall *Retail Study*. The study area covers all of Cornwall, up to but excluding Bideford, Okehampton and Ivybridge to the east of the county area. The study area has been disaggregated into 26 sub-zones and over 4,000 interviews were conducted in total. The study area is also reproduced in **Appendix 1**.

4.21 It has been assumed that the Primary Catchment Area (PCA) for a new foodstore will comprise Zone 3 (the 'Hayle Zone') and Zone 2 (the 'St Ives Zone') of the 2007 PRS. The 'rest of the study area' ('ROSA') will cover Zone 1 (Penzance), Zone 4 (Marazion/ Breage) and Zone 5 (Camborne).

4.22 Unfortunately the Cornwall-wide survey is based on slightly different geographic areas that do not match up exactly with the 2007 and 2009 surveys. For example:

- Zone 3 of the Cornwall-wide survey comprises both Zone 3 and Zone 4 of the 2007 and 2009 surveys;
- Zone 1 comprises Zones 1 and 6 of the previous surveys; and
- Zones 7, 8 and 9 are consistent with Zone 8.

4.23 This makes it difficult to accurately assess changes in shopping patterns. As a result, for the purpose of our RPA we have used the combined results of the 2007 PRS and WYG surveys to assess food shopping patterns for Hayle's PCA and the wider study area. As GVA Grimley acknowledged in their recent March 2010 appraisal: *"...the 2007 household survey may attract less weight given that it is slightly older and was conducted prior to the extension of the Lidl store and the opening of the Marks & Spencer store at West Cornwall Retail Park"*(paragraph 3.23).

4.24 The 'market share analysis' for convenience goods retailing based on these two surveys is set out in more detail in **Appendix 3**.

4.25 For comparison goods shopping we have drawn on the findings of the Cornwall-wide household survey to help inform our economic analysis. Our preference for the Cornwall-wide survey is based on the fact that the 2007 survey is now more than three years old and does not take account of new retail developments that have occurred during the intervening period. Furthermore, the most recent WYG survey did not assess non-food shopping trips.

4.26 The 'market share analysis' for comparison goods retailing is set out in **Appendix 4**.

Convenience Goods Shopping Patterns

4.27 The table below compares the market shares for main and top-up food shopping based on the 2007 PRS survey and the more recent 2009 survey.

Table 4.1 Food Shopping Patterns in Zone 3 (Hayle) Only (%)

	Main Food		Top-up Food	
	2007 PRS	**2009 WYG**	**2007 PRS**	**2009 WYG**
Co-op:	23.5	16.8	27.3	45.2
Other stores:	0.0	1.1	20.5	14.5
HAYLE TOWN CENTRE:	**23.5**	**17.9**	**38.7**	**59.7**
M&S Simply Food:	-	0.5	-	4.0
Lidl:	4.4	10.3	9.1	14.5
HAYLE OUT-OF-CENTRE:	**4.4**	**10.8**	**9.1**	**18.5**
RETENTION IN PCA:	**27.9**	**28.8**	**56.8**	**78.2**

4.28 The table shows that the retention of main food shopping in Hayle's main centres has fallen from 23.5% to 17.9% between 2007 and 2009. This fall is probably explained by the impact of the new out-of-centre Marks & Spencer Simply Food store and the Lidl extension. In contrast the retention of top-up food shopping trips in the town centre's stores has increased from 38.7% to 59.7%. This confirms the primary role and function of the Co-op and other convenience stores in Copperhouse and Foundry for more frequent 'day-to-day' top-up purchases.

4.29 Overall the survey results confirm that Hayle's retention of main food shopping trips in its core Zone 3 has remained relatively unchanged since 2007 at between 28% and 29%. In other words over 70% of Hayle's residents are shopping in other superstores outside Zone 3 for their main 'bulk' food shopping purchases on a regular basis.

4.30 As Table 2 (Appendix 3) shows, those stores that households in Hayle normally visit for their main 'bulk' food and grocery shopping include:

- **Morrisons, Eastern Way, Penzance** – is achieving a market share of 17.1% from Zone 3;
- **Tesco, Branwell Lane, Penzance** – 13.5% market share; and
- **Tesco, Wesley Street, Camborne** – 26.2% market share.

4.31 All these larger superstore are trading in out-of-centre locations.

4.32 The survey results also show that the Morrisons superstore in Pool, along with the Tesco stores in St Ives, Pool, Redruth and Helston are all drawing shopping trips from Zone 3. Furthermore, a significant number of residents in Zone 2 are by-passing the food and convenience stores in Zone 3 to travel longer unsustainable distances to Camborne and Penzance for their main 'bulk' food purchases.

4.33 Overall the updated 2009 survey confirms the earlier findings of the 2007 PRS, which concluded that Hayle's food offer is *"...clearly not attractive to the majority of the local population"* (paragraph 5.37). There is therefore an unquestionable need to improve existing provision in Hayle. This should be directed towards the town centres first, followed by edge-of-centre sites in accordance with the sequential approach.

4.34 Although Zone 3 of the Cornwall-wide survey covers a wider geographic area than the 2007 PRS, the survey results also confirm that Hayle only draws 20.8% of trips for main food purchases in this zone and 55.6% for top-up shopping (see table below).

Table 4.2 Cornwall Household Survey: Food Shopping Patterns (Zones 2 & 3)

	Zone 2		Zone 3	
	Main	Top-up	Main	Top-up
Co-op:	2.1%	5.7%	12.6%	34.4%
Other stores:	0.0%	0.0%	0.0%	8.9%
HAYLE TOWN CENTRE:	2.1%	5.7%	12.6%	43.3%
M&S Simply Food:	2.1%	2.9%	1.5%	1.1%
Lidl:	2.1%	5.7%	6.7%	11.1%
RETENTION:	**6.3%**	**14.3%**	**20.8%**	**55.6%**

Source: *Cornwall Retail Study* – Household Survey
Notes: Zone 3 comprises both Zones 3 & 4 defined for the purposes of the 2007 and 2009 household surveys commissioned by GVA Grimley and WYG respectively.

4.35 Thus, although the market shares for Zone 3 cannot be compared 'like-for-like' with the 2007 and 2009 surveys, they nevertheless confirm the limited market penetration of Hayle's foodstores for main food shopping purchases across this wider geographic area.

Comparison Goods Shopping Patterns

4.36 For comparison goods shopping the survey conducted to inform the 2007 PRS found that Hayle's existing facilities only retained around 10% of locally generated trips from Zone 3. The main 'leakage' of 'bulky goods' comparison goods shopping trips is to Camborne, Pool and Redruth. Truro is also attracting significant 'non-bulky' (i.e. mainly fashion) shopping trips. Overall the survey identified a public "desire" to improve the level of shopping facilities in Hayle and a need for new comparison goods retailing, although: *"...aspirations to increase retention should be realistic due to the size of Hayle and the continued attractiveness of retail facilities in surrounding settlements"* (paragraph 5.38).

4.37 Tables A4.1 to A4.8 of **Appendix 4** set out our 'market share analysis' for different types of comparison goods shopping based on the findings of the most recent Cornwall-wide survey. Table A4.1 (**Appendix 4**) identifies the overall non-food shopping patterns across the study area. For Zone 3 the key trends are as follows:

- Hayle town centre only attracts 7.3% of all non-food shopping trips.
- Hayle's out-of-centre retailing is achieving a market share of less than 1% (although in our judgement the survey has under-estimated the wider attraction of the West Cornwall Shopping Park to visitors and tourists, etc.).
- Penzance, Truro and Camborne town centres are each attracting 28.3%, 17.9% and 11.5% of non-food shopping trips respectively from Zone 3.
- Out-of-centre retail warehouses in Camborne (14.3%) and Penzance (8.3%) are also achieving strong market shares in Zone 3.
- Truro town centre is a popular non-food shopping destination, with a market share of 17.9%

4.38 The Cornwall-wide household survey therefore confirms the findings of the 2007 PRS survey, namely that there is a significant 'leakage' of shopping trips for comparison goods purchases from Hayle's core zones and its primary catchment area.

SUMMARY

4.39 Hayle has experienced long term decline since the early 20th Century due to the closure of many of its industrial and maritime businesses. This has also impacted on the growth of its town centres. As a result Hayle performs below St Ives, Penzance and other centres in the shopping hierarchy.

4.40 Against this background, Hayle's retail and service uses are dominated by local independent retailers, along with a "handful" of multiples including the *"...modest Co-op store in the Copperhouse area which caters for top-up food shopping and some main food requirements"* (paragraph 4.61). The small convenience stores and independent shops in Foundry and Copperhouse predominantly serve the day-to-day needs of the immediate walk-in catchment, along with passing car-borne trade and visitors to the area.

4.41 There are no major anchor food superstores in the town that have the necessary 'critical mass' in terms of the scale, range and depth of food offer to 'claw back' shoppers identified by the surveys as travelling by car to large out-of-centre foodstores located some distance from Hayle. As a result, the majority of the local population have no choice but to carry out relatively long and unsustainable journeys by car to undertake main food shopping trips. A large proportion of food expenditure is therefore 'leaking' out of Hayle to large out-of-centre foodstores in Camborne and Penzance.

4.42 The same is true for Hayle's comparison goods offer. Although the opening of the West Cornwall Shopping Park has introduced three national multiple retailers to the area and has, to a degree, helped to 'claw back' some comparison goods expenditure that was previously 'leaking' out of Hayle, the evidence does not indicate that it has resulted in significant benefits to either Copperhouse or Foundry town centres in terms of 'linked trips' and 'spin off' expenditure to other shops and businesses.

4.43 The proposed foodstore and retail warehousing proposed for South Quay will meet the need identified by the 2007 PRS and will 'claw back' a significant proportion of expenditure on 'main' food shopping and other comparison goods retailing. By increasing the retention of shopping trips and expenditure in the PCA, we believe that the retail scheme will have positive benefits for the vitality and viability of Hayle's centre in accordance with local, regional and national policy guidance.

5.0 SEQUENTIAL ASSESSMENT

5.1 The sequential approach is at the heart of the Government's objectives to focus new development and investment in town centres. The application site is in an edge-of-centre location based on PPS4 definitions (Annex B) and is also allocated in the adopted Local Plan for a variety of new uses including Class A1 (food and non-food) retail floorspace. The proposal is therefore sequentially preferable to out-of-centre locations and its local plan allocation for retailing would normally mean that there is no requirement to carry out a sequential assessment.

5.2 Notwithstanding the policy context, we have updated our previous sequential assessment, carried out for the withdrawn December 2009 planning application, in accordance with PPS4. Our analysis is also informed, where relevant, by the advice set out in PPS4 *Town Centre Practice Guidance*. We have also, where relevant, responded to the appraisal prepared by GVA Grimley (March 2010) on behalf of the Council, which assessed the relative retail planning merits of the withdrawn application for a larger foodstore proposal on South Quay.

POLICY CONTEXT & PRACTICE GUIDANCE

5.3 As explained in **Section 4**, under Policies EC14 and EC15 of PPS4 a sequential assessment is required for planning applications for main town centres uses that are not in an existing centre and not in accordance with an up-to-date development plan. Policy EC17 makes it clear that the onus rests on the applicant to demonstrate compliance with sequential approach. Failure to undertake a sequential assessment constitutes a reason for refusal. If more central opportunities are rejected, this should be for sound reasons that are clearly explained and justified.

5.4 The *Practice Guidance* (paragraph 5.7) states that if the LPA proposes to refuse an application on sequential grounds, it should be because it considers there is, or may be, a reasonable prospect of a sequentially preferable opportunity coming forward which is likely to be capable of meeting the *"same requirements"* as the application under consideration.

5.5 Policy EC15 and the Council's development plan policies require appellants to demonstrate that there are no centrally located sites, buildings or opportunities available to locate new retail development. Policy EC15.1 of PPS4 states that in considering sequential assessments required under policy EC14.3, local planning authorities should ensure that:

a. sites are assessed for their availability, suitability and viability.

b. all in-centre options have been thoroughly assessed before less central sites are considered.

c. where it has been demonstrated that there are no town centre sites to accommodate a proposed development, preference is given to edge of centre locations which are well connected to the centre by means of easy pedestrian access.

d. in considering sites in or on the edge of existing centres, developers and operators have demonstrated "flexibility" in terms of the scale (by reducing floorspace) and format (through more innovative site layouts and store configurations); car parking provision (by reducing or reconfiguring car parking); and the scope for "disaggregating" specific parts of a retail or leisure development (including those which are part of a group of retail or leisure units), onto separate, sequentially preferable, sites. However, PPS4 is also clear that LPAs should *"...not seek arbitrary sub-division of proposals"*.

5.6 The guidance also states that a decision by an individual retailer to promote a business model which cannot be accommodated in an existing centre will not justify discounting more central sites where they are available, suitable and viable. In every case it will be necessary to strike an appropriate balance between the requirements of the commercial sector and the requirements of national policy based upon local circumstances. While there is no policy requirement to demonstrate need, an operator claiming that it is unable to be flexible about its chosen 'business model' would be expected to demonstrate why a smaller store or stores could not meet a similar need.

5.7 The *Town Centre Practice Guidance* provides helpful clarification on the sequential assessment. In terms of ***"flexibility"*** the *guidance* states that the purpose behind this policy is to seek (wherever appropriate) to make effective and efficient use of previously developed land; ensure schemes are located in accessible locations; secure new investment in town centres; and improve the range and diversity of activities in town centres. The guidance states that adopting an innovative approach and promoting high density development may be the best means of achieving planning objectives and maximising development returns. In particular, where it is possible for retailers to trade satisfactorily and meet their servicing needs through multi-level stores, and/or through shared or multi-level car parking and innovative servicing solutions, this has the potential to reduce the amount of land needed for new development, thereby reducing development costs.

5.8 Notwithstanding this, it is accepted that promoting new development in town centre locations can be more expensive and complicated than building elsewhere. Therefore local planning authorities also need to be flexible and realistic in terms of their expectations. This will require them to consider the benefits of major private sector investment in their town centres (together with the improved facilities and other associated benefits that will be derived), against the implications of development occurring in other, less central locations.

5.9 By way of background, the December 2009 application for a foodstore on the South Quay site (*LPA reference: 09/1334/ORM*) was withdrawn in March 2009 following discussions with the Council and key stakeholders with regard to, inter alia, the scale, design, location and layout of the proposed store. This revised application not only responds directly to these consultations, but also promotes a more comprehensive regeneration of South Quay and Foundry Yard for new retail, residential and mixed use floorspace. In this context ING has applied significant *"flexibility"* with regard to the foodstore application and the proposed non-food retail warehouse scheme. For example,

- the proposed foodstore's sales area has been reduced to 2,550m^2 net and it has been relocated to the southern part of the application site. This means that the car park will be positioned at the 'heart' of South Quay, in between the foodstore and the proposed residential-led development to the north. This repositioning means that the store's main entrance is nearer to the southern end of South Quay, resulting in shorter walking distances to and from Foundry Town Centre. This contrasts with most retailers' preference to site the car park in front of the store so customers can easily see that parking spaces are available.

- The proposed footbridge over Penpol Creek will directly link South Quay and the car park with Penpol Terrace and the town centre. The footbridge will help to maximise the potential for 'linked' trips by foot between South Quay and the existing shops and businesses in Foundry Town Centre. It will also promote an active and viable retail circuit between South Quay and the town centre, thereby maximising the 'functional linkages' between the two shopping areas and increase the propensity of shoppers and other users to walk between the two shopping areas.

- The pedestrian linkages to and from the town centre will be further enhanced by the proposed public realm improvements to Carnsew Road, which will help to integrate South Quay with the town centre.

- As stated in **Section 3**, the store will not be served by a petrol filling station (PFS). This demonstrates further "flexibility", as most of the major competing and proposed superstores outside of Hayle have a PFS.

- The proposed store does not follow the 'norm' in architectural terms in so far as its footprint does not take the form of a "regular shaped box". The proposed building is combined with the cinema in order to ensure that, as far as possible, active frontages can be provided to both Penpol Creek and Carnsew Road and the new piazza. Furthermore, in order to site the store as close as possible to Foundry the elevation to Carnsew Road has been staggered. Finally, the proposed building adopts a very different architectural form to the more traditional "concept" foodstores in so far as it adopts an intricate roof structure with northlights which creates a series of gables along the eastern elevation. This approach together with the use of local materials significantly breaks down the scale of the building.

5.10 In our judgement the proposed scale, format, layout and car parking is the minimum required to help 'claw back' a significant proportion of the shopping trips and retail expenditure currently identified as 'leaking' out of Hayle's PCA to competing large (primarily out-of-centre) foodstores.

5.11 Furthermore, comparisons with the other applications/ proposals for foodstores in Hayle show that the South Quay scheme has significantly less sales floorspace than the out-of-centre Sainsbury's and Asda proposals.

Table 5.1 Hayle - Foodstore Applications

Store / Address	Location	Net Floorspace (m^2)	Parking
ING Proposal – South Quay	Edge-of-centre	2,550	276
Morrisons – Jewson Site	Edge-of-centre	1,858	227
Sainsbury's – Marsh Lane	Out-of-centre	3,042	325
Asda – Memorial Park	Out-of-centre	3,345	410

5.12 Although the proposed Morrison's foodstore is smaller, we do not consider that it will provide the necessary 'critical mass' and mix of food/ non-food retailing to compete effectively with the larger competing out-of-centre superstores. In our view it will not achieve the significant *"step change"* in retail provision and shopping behaviour identified by the 2007 *Penwith Retail Study* (paragraph 7.9).

5.13 The potential for the foodstore to 'claw back' shoppers and retail expenditure from outside of Hayle, with wider potential benefits for the town centre, will be further enhanced by the co-location with the cinema and the non-food retail scheme proposed for Foundry Yard.

5.14 With regard to the three proposed non-food retail units, our sequential assessment has had regard to the advice in PPS4 (Policy EC15.1.d(iv)) relating to the *"disaggregation"* of specific parts of retail or leisure developments, onto separate sequentially preferable sites. In this context we have assessed the suitability, viability and availability of alternative sites in Hayle's main centres to accommodate 'solus' retail units with a ground floor GIA of circa 427m^2 (4,600 sq ft). These units would also need to have good visibility and accessibility off the road network; provide adequate servicing and storage arrangements; and have some car parking provision.

5.15 Although we have adopted a highly *"flexible"* sequential approach in accordance with PPS4, it is important to restate that the rationale behind the proposed new retail floorspace, cinema and residential accommodation is that, together, they will promote the physical, economic and social integration of this important derelict 'gateway' site with the Foundry centre. The resulting benefits to Hayle's overall local economy will be significant. For example, the scheme has the potential to:

- 'claw back' a significant number of people who currently live in or close to Hayle, but who currently have to shop elsewhere due to Hayle's limited retail offer;
- generate 'linked trips' and 'spin off' expenditure to existing shops, services and businesses in Hayle's two centres (Copperhouse and Foundry) , thereby strengthening their overall vitality and viability; and
- significantly improve the environment and attraction of this important harbourside area, resulting in increased trips and longer 'dwell times' by visitors and tourists to the area.

5.16 This, in turn, will benefit Hayle's local economy through increased expenditure in the area. In our judgement the same positive benefits to Hayle and the local economy will not occur if different components of the food and non-food retail floorspace are effectively *"divided up"* and re-provided elsewhere across Hayle's main centres. This would effectively dilute the scheme's attraction to residents and visitors to the town.

BUSINESS MODEL

5.17 In considering whether *"flexibility"* has been demonstrated under policy EC15.1.d, local planning authorities should also take into account any genuine difficulties which the applicant can demonstrate are likely to occur in operating the proposed business model from a sequentially preferable site. Examples include where a retailer would be limited to selling a significantly reduced range of products. However, PPS4 also states that evidence that claims that the class of goods proposed to be sold cannot be sold from the town centre should not be accepted.

5.18 By way of background to the proposed foodstore application, the scale, design and layout of the store is intended to meet the needs and expectations of all the major grocery operators as there is not currently a specific retailer identified. Modern retailers look for new stores to provide a wholly integrated offer, as this allows for a wide range and depth of convenience goods and complementary comparison goods *"under one roof"*. If ranges were to be removed from the business model concept (such as, for example, disaggregating the food and non-food floorspace) then the trading characteristics and commercial viability of the foodstore would be undermined, as it would not be able to compete 'like-for-like' with other foodstores in out-of-centre locations. The potential for 'claw back' would also be significantly compromised.

5.19 If the foodstore's floorspace was disaggregated to more than one central location, then customers would also be presented with a situation whereby to sample the entire product range on offer they would have to potentially make two or more trips to different stores in different locations, with obvious logistical and sustainability implications. This is contrary to the Government's objectives for a competitive retail sector, sustainable development, social inclusion and reducing the need to travel. In addition, the foodstore operator would have to endure increased operational costs associated with trading from two or more separate premises, including storage implications, rents, staff, wages and running costs. In terms of economies of scale this is impractical and inevitably the cost of products will need to rise to reflect this. To this end, meeting the established business model of foodstore operators on the application site is fundamental to its overall attraction and commercial viability. Indeed, the foodstore proposed for South Quay has necessarily been based on the current layout, range and depth of goods provided in competing out-of-centre superstores outside of Hayle.

5.20 Against this background, we consider that the sequentially preferable sites and/or premises would need to be capable of accommodating a total sales area of 2,550m^2 net, with off-road servicing and delivery. In addition, there would need to be substantial back-up storage and freezer space, as the perishable nature of some of the fresh produce sold means that it is not possible to display large quantities of the same product on the sales floor. It is therefore important for the operator to have such items in stock in the store so that shelves can be quickly re-filled to meet customer demand. As a result, major foodstore operators need extensive and easily accessible storage in order to meet customer demand, especially during peak shopping periods.

5.21 The assessment of prospective alternative sites should not therefore compromise these broad requirements. Nevertheless, as stated above, we have adopted a “flexible” approach in terms of the size, layout and trading format of the proposed development, together with the scale and nature of the car parking provision and access/servicing arrangements. For instance, the sequential sites assessed have not been considered on the basis of a fixed layout.

5.22 With regard to the non-food retail scheme on the Foundry Yard site, its location, design, layout and car parking is intended to maximise the benefits for Hayle through ‘linked trips’ and ‘spin off’ expenditure with the proposed foodstore and town centre shops and businesses. Although we have carried out a sequential assessment in accordance with PPS4 and “disaggregated” the various components of the proposed retail scheme into ‘solus’ retail units, it is material to note the advice in the *Practice Guidance* which states that:

> *“The size and bulk of goods sold will also influence the size and type of store required. This applies particularly to retailers selling bulky durable goods, such as DIY, furniture, carpets and domestic appliances. In many cases these forms of development are regarded as complementary to the role of town centre retailing, and do not generate sufficient sales productivity to trade in prime town centre locations”* (paragraph 6.31).

5.23 As the guidance states, in every case it is necessary to strike a balance between the requirements of the commercial sector and the requirements of national policy based on local circumstances.

SEQUENTIAL SITES APPRAISAL

5.24 The sequential sites previously agreed with the Council are set out in the adopted 2004 Local Plan and the Hayle AAP *Issues and Options* document (January 2008)[‡‡‡]. An assessment of out-of-centre sites is not required under the sequential test as the application site is in an edge-of-centre location.

5.25 The two edge-of-centre allocated sites identified by the adopted Local Plan Proposals Map[§§§] are Proposals TV-D (Hayle Harbour) and TV-E (the Foundry area). Proposal TV-D includes the application site and it has previously been agreed with the Council that only the Jewson site needs to be assessed. The Jewson site is also identified in Proposal H1 of the 2008 Hayle AAP. The other relevant sites identified by the AAP to be assessed are:

- The Bookers Warehouse (Foundry) site (H2)
- R&J Supplies site - Copper Terrace (H4)
- Atlantic Motors site - Commercial Road / Fore Street, Copperhouse (H8)
- Former Daniel’s store – Copperhouse (H9)

5.26 In addition, we have also assessed a number of vacant premises and sites in Hayle’s main centres. Our sequential assessment of the potential opportunity sites is also set out in **Appendix 5**.

5.27 The Jewson site is currently the subject of a planning application by Morrisons and we consider its suitability, viability and availability for a new foodstore in more detail below. Before appraising the Jewson site, we have first updated our assessment of the potential for other sites to accommodate the new foodstore application. Our assessment has confirmed the findings set out in our previous RPA in support of the December 2009 application, namely that none of the four sites identified by the Hayle AAP (i.e. excluding the Jewson site for the moment) or Proposal TV-E represent sequentially preferable sites

5.28 Our 2009 findings have been supported by the recent March 2010 appraisal by GVA Grimley, who advised the Council that:

‡‡‡ Whilst it is fully acknowledged by the Council that the Issues and Options document carries little weight in terms of policy, for completeness it was agreed that those sites that are potentially sequentially preferable to the application site should be assessed. It should be noted that Proposal H1 incorporates the application site.

§§§ Please note that there are no allocated sites in the defined town centres (Foundry and Copperhouse) on the adopted Local Plan Proposals Map

"...the ING application site performs well within the sequential assessment and there are no sequentially preferable sites within Hayle at either Copperhouse or Foundry Town Centres. This conclusion is supported by our analysis within the PRS report which noted that the Harbour area offers a good opportunity to incorporate retail uses as part of a wider land use mix and the report supported the local plans requirement that new retail floorspace in the harbour area must be closely integrated within the existing defined centres. On that basis the PRS report supported the allocation of the harbour area for retail uses, although this was subject to further consideration being given the location and scale/ type of proposed facilities" (paragraph 3.11).

5.29 GVA also concluded that: *"...vacant units within the centre are small scale and would not be able to accommodate a food store use"* (paragraph 3.10). This position has not changed from the previous application.

5.30 In this context, the identified sites do not therefore represent sequentially preferable alternatives to South Quay for a new foodstore of an appropriate scale to meet the need identified in the Council's 2007 retail study.

5.31 With regard to the proposed non-food retail scheme at Foundry Yard, we have assessed the potential for the identified sites to accommodate 'solus' retail units. The key findings of our sequential assessment are as follows:

- **Atlantic Motors site** – the site is currently occupied by Atlantic Car Sales. They appear to be trading well and our recent discussion with the owner has confirmed that there are no plans to close down the business in the foreseeable future. We do not therefore consider that the site can be considered as being available for new retail development. Notwithstanding this, although the site could potentially accommodate some non-food retail floorspace, the size and configuration of the site would not meet the needs of a modern operator.

- **Former Daniel's store** – the store is within the town centre boundary of Copperhouse, but closed in 2002 and remains vacant. It could accommodate new retail floorspace at ground floor level, but the size and layout of the floor area would mean that it would not meet the needs of a large non-food retailer for modern floorspace, servicing and parking. We also understand that the site has recently been purchased and is therefore not available for development.

- **R&J Supplies** – the site is allocated for residential development in the local plan and the 2007 PRS also indicates that it is unsuitable for large-scale retail development. The site does not have meaningful retail frontage, making it unsuitable for a commercially viable foodstore or non-food retail unit. The March 2010 appraisal of this site by GVA also concluded that it is more suited to residential uses, *"...although some small scale retailing uses may be appropriate* *fronting onto Copper Terrace"*. It would not therefore represent a suitable or viable location for a larger retail unit.

- **Booker's warehouse site** – this edge-of-centre site is allocated under Policy TV-E is for a Heritage Centre Craft Workshops and ancillary retail. The provision of larger retail uses on this site would therefore represent a departure from local plan policy.

5.32 Based on our assessment, we therefore conclude that none of the identified sites represent sequentially preferable alternatives for the Foundry Yard non-food retail development proposal. It is also important to restate that the scale of comparison goods retail floorspace proposed by the application will not soak up all the capacity identified by the 2007 PRS up to 2021 and there is, therefore, significant potential for additional, smaller scale Class A1 retail floorspace to be provided elsewhere in Hayle's main centres.

5.33 Notwithstanding our key findings, GVA Grimley advised the Council in the March 2010 appraisal that the Jewson site *"...should not be ruled out as being significantly different in terms of the sequential assessment"* (paragraph 3.11). We therefore assess the availability, suitability and viability of the Jewson site for new retail development compared with ING's application site in more detail below.

THE JEWSON SITE

5.34 This Jewson site is located to the west of South Quay and north of Carnsew Road, on the edge of Foundry Town Centre. Carnsew Quay site is currently subject to a full planning application by Actoris Ltd for a Morrison's foodstore of 3,355m^2 gross (1,858m^2 net) to be served by 227 car parking spaces, with new vehicular access from Carnsew Road.

5.35 The site lies within saved Proposal TV-D of the 2004 Local Plan (this also covers South Quay and Foundry Yard) and is therefore allocated for mixed use development, including Class A1 retailing. The adopted Local Plan states that in the interests of safeguarding the vitality and viability of both Hayle town centres, retail uses proposed on the allocated Proposal TV-D site should be well integrated both physically and visually with Foundry town centre.

5.36 In our original assessment of the site as part of the (withdrawn) December 2009 planning application we concluded that although it could be defined as being edge-of-centre, it is clearly not as close to the existing defined shopping area in Foundry town centre as South Quay (we would now add that it is not as close as Foundry Yard). This is confirmed by the 2007 PRS and the Hayle AAP *Issues and Options* document which concluded that:

- the Jewson site is not the closest part of the harbour area to the defined town centre and, on this basis, may not be a preferred location for retail within the wider harbour development. The 2007 PRS concluded that: *"...the redevelopment characteristics of this site should reflect the wider harbour regeneration proposals being promoted by ING (the owners of the harbour) to ensure a comprehensive solution to this very important part of Hayle. Therefore, the potential for retail uses on this site should take into account (and not impact upon) the wider regeneration proposals, thus demonstrating a need and compliance with the sequential approach to site selection"*.

- The Hayle Area AAP also states that the site is not the closest part of the harbour area to Foundry town centre and, on this basis, "...may not be a preferred location for retail uses *within the wider harbour redevelopment"*.

5.37 In response to our assessment, GVA Grimley advised the Council that: *"...we would reiterate that the edge of the Jewson site is further away from Foundry Centre than the ING application (if their respective nearest points are considered)"* (paragraph 3.8). However, GVA also indicated the Jewson site: *"...has the potential to provide a walking distance which is not materially different to the South Quay proposal"*.

5.38 We do not agree with GVA's advice to the Council on the Jewson site for the following reasons:

- First and foremost, GVA's appraisal was prepared in advance of a planning application for the Jewson's site. At that time GVA did not, therefore, have sight of any application plans. With the benefit of the plans it can be seen that Morrisons store is proposed to be located towards the back of the Jewson site, with its entrance at the furthest point from Foundry town centre. The proposed store is also surrounded by car parking to the east and south. As a result people walking to and from the store entrance would have cross the store's car park and the busy new access road off Carnsew Road. At this point they would then have to walk around the southern edge of South Quay before reaching the Viaduct, which forms the 'gateway' to the southern part of Foundry Town Centre. By comparison, pedestrians walking to and from the proposed foodstore on South Quay would not have to negotiate any access roads or car parks and would be directed across Carnsew Road in a safe manner. They would also have a shorter and more attractive walk to the southern part of the town centre.
- Furthermore, the Council will be aware that as part of ING's planning application a footbridge is proposed over Penpol Creek. This reflects the outline planning permission (*LPA reference: 08/0613/P*). The footbridge will further help to link South Quay with the existing shops and businesses in Foundry Town Centre and the rest of Hayle.

5.39 The Jewson site and proposed foodstore is therefore further from the town centre than the foodstore planned for South Quay and the pedestrian linkages between the Jewson site and the town centre are significantly less convenient and attractive. In this regard it is to be noted that ING is promoting a piazza immediately to the north of Carnsew Road and will be providing footpaths on both sides of the road that will provide safe access to the controlled pedestrian crossings. On this basis, it is considered that the Morrisons proposals fails to integrate with the town centre as identified by GVA Grimley as a key requirement of any major retail proposal.

5.40 Furthermore, and fundamental to the sequential assessment, Morrisons simply cannot deliver the same degree of integration with the town centre as South Quay, as the land required to provide the pedestrian access is predominantly in ING's ownership.

5.41 The Morrisons application will not bring forward any of the other positive benefits associated with ING's application. For example, it will

- not in any way act as a catalyst to the wider regeneration of the harbour;
- not bring forward the development of the derelict South Quay site; and
- not deliver any of the repairs to the historic harbour walls.

5.42 Indeed all of these early benefits would be jeopardised should planning permission be granted for the foodstore on the Jewson site, as this use is seen as the one land use that can bring support the considerable enabling costs associated with South Quay.

5.43 Against this background, it is hard to conclude that the Actoris application can in any way be seen to be compatible with the concerns of GVA Grimley when it stated in 2007 that: *"...the redevelopment characteristics of this site [the Jewson site] should reflect the wider harbour regeneration proposals being promoted by ING (the owners of the harbour) to ensure a comprehensive solution to this very important part of Hayle. Therefore, the potential for retail uses on this site should take into account (and not impact upon) the wider regeneration proposals, thus demonstrating a need and compliance with the sequential approach to site selection"*. In this context, should the Morrisons go forward, rather than complement South Quay it would effectively stop it.

SUMMARY

5.44 The edge-of-centre application site (South Quay and Foundry Yard) is already allocated for the provision of new Class A1 retail floorspace in the Council's development plan and is highly accessible by a choice of means of transport. The Council has therefore already previously accepted that it meets the sequential 'test' for new retail development.

5.45 Our updated sequential assessment has identified that there are no other sequentially preferable sites either in, or on the edge of Hayle that can accommodate the scale, format and parking provision proposed, even after adopting a flexible approach to development. The proposed food store and non-food retail floorspace on South Quay and Foundry Yard, along with the other proposed uses and attractions, will significantly improve consumer choice in a sequentially preferable location. The proposed new retail and commercial leisure floorspace will also meet the need identified by the 2007 PRS for a *"step change"* in Hayle's offer and shopping patterns.

5.46 Out-of-centre sites have not been considered, as these are not sequentially preferable to the application site. Furthermore, proposals for additional new retail floorspace in out-of-centre locations will not result in significant benefits for the town centre in terms of 'linked trips' and 'spin off' expenditure to existing shops, businesses and facilities.

6.0 ECONOMIC (TRADING) IMPACT ASSESSMENT

6.1 To help inform the assessment of the likely impact of the proposed new retail floorspace on the vitality and viability of Hayle, this section first considers the economic trading impact on in-centre turnover under **Policy EC16.1.d**. This economic analysis will provide a robust and sound starting point to help inform the assessment of the wider inter-related impact 'tests' set out in Policy EC16.1 of PPS4 (see **Section 4**)

IMPACT MODEL & APPROACH

6.2 In accordance with advice set out in the *Town Centre Practice Guidance* we have developed our in-house *CREAT*^{e} economic model over a number of years to specifically assess the capacity for, and impact of, new convenience and comparison goods retail floorspace.

6.3 The Excel-based model adopts a transparent *'step-by-step'* goods-based approach in which all the key assumptions and forecasts can be easily interrogated and tested. Thus, although retail planning assessments generally rely on a series of informed judgements to assess the likely turnover, trade draw and impact of new developments, the *Practice Guidance* confirms that one of the main advantages of the *'step-by-step'* approach is that it: *"...enables the judgements and factors underlying them to be fully explained and tested"* (paragraph D.23).

6.4 The Explanatory Note in **Appendix 6** describes the *'step-by-step'* approach and the key baseline assumptions and forecasts underpinning our economic impact assessment in more detail.

6.5 The detailed economic impact tables are set out in **Appendix 7** for convenience goods retailing and **Appendix 8** for comparison goods.

CONVENIENCE GOODS IMPACT ASSESSMENT

6.6 The application is for a foodstore comprising a total convenience goods sales area of 1,658m^2 net (see Table 5, **Appendix 7**).

Turnover Forecasts

6.7 As described in **Section 3**, the proposed store does not have a named operator. The *Practice Guidance* states (paragraph D.12) that where occupiers are not known then it will be necessary to consider a range of turnovers and implications. Although the use of published average turnover levels derived from company accounts can provide a basis upon which to gauge the possible turnover of a development, the guidance also indicates at paragraph D.15 that:

"...a retailer may be content with accepting a lower turnover level for a new store than their company average in order to gain representation in an area. It is therefore recommended that sensitivity testing a high and low level of turnover is carried out and the implications of this be examined where the predicted levels of impact suggest that such testing is necessary".

6.8 In this context we consider that it is reasonable to assume that a foodstore at South Quay could achieve an average sales density of £10,000 per m^2 in 2010 (at 2008 prices). Notwithstanding this, we have also tested the potential trading implications of an operator trading at a higher average sales level of £13,000 per m^2. This is equivalent to a turnover range of between £16.6m and £21.5m at the base year.

Catchment Area

6.9 The next step in the economic analysis is to determine the proposed store's likely catchment area and trade draw pattern. As described in **Section 5**, it has previously been agreed with the Council that the primary catchment area (PCA) for a new store on South Quay will cover Zones 2 (St Ives) and 3 (Hayle), as defined by the 2007 PRS. We have also assessed the potential trading effects of the proposed store across the 'rest of the study area' ('ROSA'), which comprises Zone 1 (Penzance), Zone 4 (Marazion / Breage) and Zone 5 (Camborne).

Trade Draw

6.10 Our assessment of the proposed store's likely trade draw is based on the identified shopping patterns identified by the accumulated survey evidence, as well as consideration of the location, scale and retail offer of the proposal benchmarked against similar competing stores within the defined catchment area. We have also taken into account a range of other factors. For example, the trade draw of the proposed store cannot be assessed separately from the attraction of the other non-food retail floorspace proposed for the Foundry Car Park site, as well as the wider planned development and regeneration of South Quay, including the cinema proposal. Together these complementary retail, commercial leisure and other uses and attractions will have the necessary critical mass to maximise the 'claw back' of shoppers and expenditure to Hayle during the daytime and evenings. Furthermore, experience shows that 'linked trips' will occur between the complementary uses proposed and other shops and businesses in Hayle.

6.11 In this context we estimate that the proposed foodstore trading at an average sales density of £10,000 per m^2 will achieve the following trade draw pattern and market share levels within its PCA and the ROSA.

Table 6.1 Hayle – Trade Draw & Market Share Analysis (@£10,000 per m^2)

ZONES:	1	PCA		4	5	Outside 1-5	TOTAL:
		2	3				
Trade Draw (%)	3.5%	15%	60%	3.5%	3.0%	15%	100%
Trade Draw (£m)	£0.6	£2.5	£10.1	£0.6	£0.5	£2.5	£16.8
Market Share (%)	1.2%	10.4%	37.9%	2.5%	1.1%	-	-

Source: Appendix 7 (Table 12)

6.12 We estimate that the store will draw 75% of its total turnover from within the PCA, 10% from the rest of the study area and 15% from beyond Zones 1-5. The 15% trade draw from outside the study area is a robust assumption as we consider that the new foodstore, along with the other proposed uses and attractions on the application site, has the potential to draw significant retail expenditure by tourists, visitors and second-home owners to Hayle. This, in turn, will generate significant positive benefits for other stores and businesses in Hayle through 'linked trips' and 'spin off' expenditure[****].

Trade Diversion

6.13 The assessment of the likely trading characteristics of the proposal represents *"...an important first step, as a means of judging, on a zone by zone basis, the likely changes in shopping patterns arising and the centres from which the proposal is likely to divert its trade"* (*Practice Guidance*, paragraph D.22). The next step is to assess the proportion of the proposal's trade drawn from each study zone that is likely to be diverted from existing stores and centres that are currently drawing trade from these zones. This assessment of trade diversion is based on a series of informed judgements. For example, it is generally assumed that *'like affects like'* and consumers will generally seek to use the closest, most convenient comparable facility to where they live or work.

6.14 Our assessment has principally been informed by the shopping patterns identified by the household surveys. As described in **Section 5**, the accumulated survey evidence shows that there is a significant leakage of main 'bulk' food shopping trips and expenditure from Hayle (Zone 3) and the PCA (i.e. Zones 2 and 3) to large modern out-of-centre stores located some distance from the town centre and Hayle's resident population. The main competing foodstores include the out-of-centre Tesco stores in

**** Please note that the majority of this 'holiday-related' expenditure will not be new to Hayle, as there is already significant (self-catering) holiday accommodation in the PCA (including large static and mobile caravan parks). The scheme will not, therefore, add new traffic to the highway network.

Camborne, Penzance, Pool and Helston, as well as the Morrisons stores in Penzance and Pool.

6.15 Our health check analysis has also confirmed the findings of the 2007 PRS, namely that there is a significant qualitative deficiency in foodstore provision in the PCA and existing supermarkets and convenience stores in Hayle are not meeting the 'main' food shopping needs of its catchment population.

6.16 The proposed edge-of-centre store therefore has the potential to 'claw back' a significant proportion of the main food and supplementary non-food expenditure currently 'leaking' to existing out-of-centre foodstores. In our judgement the impact on the town centre's existing food and convenience stores will be limited, as the survey results show that they primarily cater for the more frequent 'day-to-day' top-up shopping needs of the local resident population.

6.17 Tables 13 and 14 of **Appendix 7** set out our detailed economic impact forecasts. The table below summarises the main trade diversion and impact assessment for the baseline turnover assumption and the 'high' turnover estimate.

Table 6.2 South Quay Foodstore Proposal – Trade Diversion & Impact (2015)

	Scenario 1 @£10,000 per m^2		Scenario 2 @£13,000 per m^2	
	£m	**% impact**	**£m**	**% impact**
Co-op – Copperhouse:	-£1.7	-18.5%	-£2.3	-24.1%
Other Stores:	-£0.2	-8.4%	-£0.3	-10.9%
Hayle Town Centre – Total:	**-£1.9**	**-16.5%**	**-£2.5**	**-21.4%**
Lidl:	-£1.1	-25.9%	-£1.5	-33.6%
M & S:	-£0.3	-13.6%	-£0.4	-17.7%
Hayle Out-of-Centre – Total:	**-£1.4**	**-21.7%**	**-£1.9**	**-28.2%**
Tesco – St Ives Rd:	-£1.1	-6.8%	-£1.4	-8.8%
Tesco – Camborne:	-£3.1	-6.5%	-£4.1	-8.5%
Morrisons – Penzance:	-£3.1	-8.4%	-£4.0	-10.9%
Tesco – Penzance:	-£2.1	-6.1%	-£2.8	-7.9%
Tesco Extra – Pool/ Redruth:	-£0.7	-1.4%	-£0.8	-1.9%
Morrisons – Pool/ Redruth:	-£0.6	-1.6%	-£0.7	-2.1%

Source: **Appendix 7**, Tables 13 & 14

6.18 It is important to state at the outset that we consider that both economic forecasts represent a *'worse case'* impact scenario, as they do not take account of the positive economic benefits of the proposed store to the rest of Hayle in terms of the likely 'spin-off' expenditure that will occur due to the significant 'claw back' of shoppers. It is therefore important when assessing and interpreting the forecast impact figures to weigh any negative impacts against the positive benefits of the proposal. We consider the positive impacts of the proposed scheme and other material considerations in more detail in **Section 8**.

6.19 As the table shows, the highest forecast trade diversion (or rather 'claw back') in monetary terms will be from the out-of-centre Tesco in Camborne and the out-of-centre Morrison's and Tesco superstores in Penzance. These stores currently account for a significant proportion of the 'leakage' from the PCA and specifically from Hayle (Zone 3).

6.20 We also forecast some trade diversion from the Morrisons and Tesco Extra stores in Pool/ Redruth. The survey results show that there is 'leakage' of shoppers and main food expenditure to both these stores from Hayle (Zone 3). We would therefore expect a modern and more convenient foodstore at South Quay, along with the other uses and attractions proposed, to 'claw back' a proportion of this 'lost' trade.

6.21 The out-of-centre Tesco store at Carbis Bay is located on St Ives Road to the north west of South Quay. We forecast that the proposed store will draw shoppers from this store for whom South Quay will represent a more convenient and accessible location (including those who currently travel past South Quay as part of their regular journey to or from home and work). Notwithstanding this, we do not consider that it will experience the same level of trade diversion as the out-of-centre stores in Camborne and Penzance, as the survey evidence does not show as high a 'leakage' from Hayle (Zone 3) to this store.

6.22 Turning to the foodstore and convenience provision in Foundry and Copperhouse town centres, we forecast that the greatest level of trade diversion will be from the Co-op store on Copper Terrace. This is the closest supermarket to the South Quay application site and there will inevitably be some overlap between the two stores in terms of their food and grocery offer. Notwithstanding this, the smaller Co-op store has a more limited range and depth of food, convenience and non-food items. As a result it does not primarily function as a significant main food shopping destination in Hayle. This is confirmed by the survey evidence which shows that the Co-op has a market share for main food shopping of less than 19% within Zone 3. As a result, the smaller Co-op store clearly does not have the necessary 'critical mass' in terms of its scale and offer to draw shoppers from the larger out-of-centre superstores located both within and outside the defined study area.

6.23 The survey evidence confirms that the main role and draw of the Co-op is for more frequent 'top-up' food shopping trips. In our judgement the proposed foodstore at South Quay will not have a significant impact on the 'day-to-day' role of the Co-op store for convenience shopping. This is because a substantial proportion of these more frequent trips will be by local residents who walk to and from the store from their homes in the Copperhouse area. Currently, however, a proportion of the Co-op's turnover (particularly its main food expenditure) will be derived from households living in and around Foundry town centre and to the west of Hayle. For these people the proposed foodstore at South Quay will be more convenient and accessible than the Co-op.

6.24 We forecast a limited trade diversion and impact from the 'other' smaller food and convenience stores in Copperhouse and Foundry town centres as these more specialist stores will not compete *'like-for-like'* with the proposed foodstore.

6.25 Finally, we estimate that the South Quay store will divert some shoppers and expenditure from the out-of-centre Lidl 'deep discounter' and the Marks & Spencer Simply Food store on the A30. The recently extended Lidl store now provides a wider range of goods and the survey evidence shows that it accounts for just under 9% of main food shopping trips in Zone 3 and just over 13% of top-up shopping. Our forecast levels of trade diversion and impact reflect the fact a foodstore operator trading from South Quay (if planning permission is granted) will compete *'like-for-like'* with the Lidl on a wide range of goods, as well as being competitive in terms of pricing and 'own label' products.

6.26 With regard to the M&S Simply Food store, the household survey results do not indicate a significant market share in Zone 3 for either main food (0.4%) or top-up (3.0%) shopping. We consider that this is something of an anomaly in all the surveys and is most likely explained by the fact that its 'specialist' food offer forms part of a larger M&S variety store format which serves a much wider catchment area. The store's wider trade draw is also explained by its location off the A30 and by the fact that it is trading in the West Cornwall Shopping Park (which includes Next, Boots and Costa Coffee) and attracts 'linked' shopping trips to these stores, as well as drawing significant expenditure from tourists, visitors and second-home owners. For this reason we do not consider that the survey results provide a robust assessment of the 'potential' turnover of the M&S. Notwithstanding the survey evidence, the forecast level of trade diversion and impact on the M&S store will not be significant, given its more specialist top-up offer and wider catchment.

COMPARISON GOODS IMPACT ASSESSMENT

6.27 The comparison goods retail floorspace proposed as part of this application comprises the non-food sales area of the foodstore, the ancillary retail units on south Quay[††††] and the three retail units on the Foundry Yard site.

†††† Please note that the ancillary retail units proposed for South Quay could potentially be taken-up by a mix of cafe and restaurant operators. Scenario 2 therefore represents a 'worse case' scenario in terms of the quantum of new non-food floorspace that could be provided.

Turnover Forecasts

6.28 The table below sets out our forecasts of the potential comparison goods turnover of the proposed floorspace. The range of turnovers forecast under Scenarios 1 and 2 are based on the trading characteristics of the different operators that could potentially occupy the proposed new retail floorspace.

Table 6.3 Proposed Non-Food Retail Floorspace – Turnover Forecasts

	Turnover – Scenario 1			Turnover – Scenario 2		
	Non-food Sales	Sales Density	2010 Turnover	Non-food Sales	Sales Density	2010 Turnover
	m^2 net	£ per m^2	£m	m^2 net	£ per m^2	£m
Foodstore	893	£6,000	£5.4m	893	£9,000	£8.0m
Ancillary Units	-	-	-	264	£3,000	£0.8m
Foundry Site	1,256	£2,250	£2.8m	1,256	£4,500	£5.7m
TOTAL:	**2,149**	**£3,808**	**£8.2m**	**2,413**	**£6,000**	**£15.4m**

Source: Appendix 8 (Table 5)

6.29 Under **Scenario 1** we forecast that the proposed non-food retail floorspace will have a total turnover of £8.2m in 2010 (at 2008 prices). This is based on a superstore in this location achieving a total turnover of £5.4m, based on a reasonable average sales density of £6,000 per m^2. For the Foundry Yard site we have assumed that the retail units will be occupied by large format (traditional) 'bulky' goods retailers and will achieve an average sales density of £2,250 per m^2. Under this scenario we have also assumed that none of the ancillary shop units on South Quay will be occupied by non-food retailers. We consider this is a realistic assumption, as the size and configuration of these smaller outlets has been designed to appeal more to cafe and restaurant (Class A3) operators.

6.30 Under **Scenario 2**, we forecast that the proposed non-food retail floorspace could have a higher turnover of £15.4m in 2010 (at 2008 prices). This assumes that the foodstore could achieve a higher average sales density of £9,000 per m^2 and that all the ancillary units on South Quay will be occupied by non food retailers trading at £3,000 per m^2. For the Foundry Yard site we have also assumed that the three retail units will be occupied by businesses trading at higher average sales levels of £4,500 per m^2.

6.31 Notwithstanding our assessment of the higher turnover scenario, we consider that it will represent a 'worse case' impact scenario and should therefore be interpreted with caution.

Catchment

6.32 The catchment area for the proposed non-food retail floorspace has been informed by the study zones defined for Cornwall-wide household survey. This survey provides the most current picture of non-food shopping patterns in the area and is therefore preferred to the survey carried out for the 2007 PRS. However, as described in **Section 5**, one drawback of using the Cornwall-wide survey is that the study zones differ slightly from those adopted for the 2007 PRS (see **Appendix 1**) and for our convenience goods impact assessment. Notwithstanding this, we consider that the benefits of using the most recent survey evidence to assess current shopping patterns outweigh the differences in the catchment area definitions.

Trade Draw

6.33 We have made the reasonable assumption in this case that the proposed non-food retail floorspace will broadly achieve similar trade draw patterns to the proposed foodstore. As for our assessment of the foodstore's trading characteristics, it is important to note that the trade draw analysis for the non-food retail floorspace cannot be carried out in isolation of the other uses proposed for the application site. In our view the complementary retail and commercial leisure offer proposed for the Foundry Yard site and South Quay will have the necessary critical mass to help maximise the 'retention' of shoppers, visitors and expenditure in Hayle. This will help to achieve the *"step change"* in its retail and wider town centre offer identified by the 2007 PRS.

6.34 Against this background we estimate that the proposed non-food retail floorspace will achieve the following trade draw pattern and market share levels within the PCA and across the wider study area.

Table 6.4 Hayle – Trade Draw & Market Share Analysis

ZONES:	PCA			4	Outside 1-5	TOTAL:
	1	2	3			
Trade Draw (%)	5%	15%	62%	3.0%	15%	100%
Trade Draw (£m)	0.4 – 0.8	1.3 – 2.3	5.4 – 9.5	0.3 – 0.5	1.3 - 2.3	8.7 – 15.4
Market Share (%)	0.4 – 0.7	3.4 – 6.0	6.6 – 11.6	0.3 – 0.6	-	-

Source: Appendix 8 (Table 9)

6.35 Overall we estimate that the proposed non-food retail floorspace will draw approximately 77% of its total turnover from within the PCA and 8% from the ROSA. The trade draw from outside the defined study area is assumed to be broadly the same as for the foodstore proposal. As stated previously, the attraction and draw of the retail and commercial leisure floorspace will benefit from their complementary offer and functional linkages.

Trade Diversion

6.36 Our assessment of the potential diversion of trade from existing foodstores, retail warehouses and centres to the proposed retail floorspace has been informed by the shopping patterns and market shares derived from the recent Cornwall-wide survey (see **Appendix 4**).

6.37 As described in **Section 5**, both the 2007 PRS and the Cornwall-wide survey show a significant 'leakage' of non-food shopping trips and expenditure from Hayle to larger out-of-centre retail warehouses, stores and centres located some distance from the town centre. Currently the Cornwall-wide survey shows that Hayle town centre's floorspace is only retaining some 9.4% of comparison goods shopping trips in Zone 3. The main 'leakage' of expenditure is to out-of-centre shopping locations in Camborne and Penzance, as well as to shops and stores in the main centres of Penzance, Truro and Camborne. This confirms the findings of the 2007 PRS, namely that there is a qualitative and quantitative need to improve comparison goods retailing in Hayle.

6.38 Tables 10 and 11 of **Appendix 8** set out our detailed assessment of the potential trade diversion and impact forecasts. The table below summarises the forecast impacts for Hayle, St Ives, Camborne and Penzance.

Table 6.5 Non-Food Retail Proposals – Trade Diversion & Impact (2015)

	Scenario 1: Baseline Turnover		Scenario 2: High Turnover	
	£m	**% impact**	**£m**	**% impact**
Hayle Town Centre – Total:	**-£0.4**	**-2.6%**	**-£0.7**	**-4.7%**
Hayle Out-of-Centre – Total:	**-£0.6**	**-21.2%**	**-£1.0**	**-37.6%**
St Ives Town Centre:	-£0.2	-1.3%	-£0.3	-2.3%
Camborne Town Centre:	-£0.4	-0.5%	-£0.6	-0.8%
Camborne Out-of-Centre:	-£1.8	-5.5%	-£3.1	-9.7%
Penzance Town Centre:	-£0.5	-0.3%	-£1.0	-0.5%
Penzance Out-of-Centre:	-£1.4	-7.3%	-£2.4	-12.9%

Source: Appendix 8 (Tables 10 & 11)

6.39 As for convenience goods retailing, we consider that the impact forecasts represent a 'worse case' trading scenario, as they do not take into account the positive benefits of the proposed retail floorspace to the rest of Hayle in terms of 'spin-off' expenditure arising from the 'claw back' of shoppers. We consider the positive impact of the proposed foodstore and non-food retail floorspace in more detail in **Section 8**.

6.40 As the table shows, we forecast that the greatest trade diversion to the proposed non-food retail floorspace will be due to the 'claw back' of shoppers and comparison goods expenditure currently 'leaking' from the PCA to the larger out-of-centre superstores and retail warehouses in Camborne, Penzance and elsewhere.

6.41 With regard to the non-food sales area of the proposed foodstore we forecast that the greatest impact will be (*'like-for-like'*) on non-food retail expenditure currently spent by shoppers in other foodstores as a supplement to their current main food shopping trips. In other words, non-food expenditure will be diverted from the larger out-of-centre superstores outside the PCA as part of the overall 'claw back' of food shopping trips and purchases. This non-food retail expenditure is not therefore being diverted from Hayle's town centres or other centres in the 'ROSA'.

6.42 With regard to the Foundry Yard proposal, the scale and types of larger format retailers who are likely to take space in this scheme will be new to Hayle and will not compete *'like-for-like'* with the smaller independent more specialist shops in the town centre. The proposed non-food retail scheme will mainly 'claw back' shoppers and trade currently 'leaking' from Hayle (Zone 3) to the larger out-of-centre retail parks in Penzance, Camborne and Truro.

6.43 Overall, we forecast the impact on Hayle's existing floorspace will be between -2.6% and -4.7% (see Tables 10 and 11, **Appendix 8**). However, these forecasts do not take account of the wider economic benefits to Hayle of 'linked trips' and 'spin off' expenditure. We consider the likely positive benefits of the proposed scheme in more detail in **Section 8**).

6.44 Overall, we do not consider that the forecast level of impact on comparison goods turnover will harm the overall vitality and viability of either Copperhouse or Foundry town centres. In our judgment the main impact of the Foundry Yard retail scheme will be to attract new retailers to Hayle and the PCA who are not currently represented, thereby helping to increase consumer choice and competition in the PCA.

TOWN CENTRE IMPACT

6.45 Under Policy EC16.1.d of PPS4 it is necessary to consider the overall impact of new retail floorspace on total in-centre trade/turnover.

6.46 We forecast that the total diversion of convenience and comparison goods expenditure from Hayle town centre will be between £2.3m and £3.2m, depending on the different floorspace and turnover scenarios.

6.47 The town centre is estimated to have a total convenience and comparison goods turnover of approximately £26.3m in 2015 (at 2008 prices).

6.48 We therefore forecast that the forecast trade diversion of convenience and comparison goods expenditure to the proposed scheme would be equivalent to an impact on the town centre as a whole of between -8.7% and -12.1%.

6.49 We do not consider that this level of trade diversion will result in a significant adverse impact on Hayle's existing floorspace under Policy EC16.1d of PPS4, particularly when assessed against the overall positive trading, economic and employment benefits of the planning application as described in the following sections.

7.0 POSITIVE TRADING BENEFITS

7.1 Section 7 has assessed the trading impact of the proposed retail scheme under Policy EC16.1.d of PPS4. However, this analysis only provides a partial picture of the likely effects of the proposed retail floorspace. This is because no account has yet been taken of the potential positive economic benefits that will result from the new foodstore 'anchor' and non-food shops for Hayle, along with the other significant proposed uses and attractions (including a cinema).

7.2 Thus, before we assess the proposed scheme against the other key impact 'tests' set out under Policy EC16.1 in **Section 9**, this section first sets out some of the key positive benefits and material considerations that we consider the local planning authority should take into account when assessing the relative merits of the application.

'CLAW BACK' & 'LINKED' TRIPS: THE RESEARCH EVIDENCE

7.3 It is widely recognised that modern foodstores and non-food retail floorspace can provide an important 'anchor' function to smaller town centres, particularly where they are well integrated with the existing shopping area. This is because smaller centres do not generally have the 'critical mass' in terms of their retail offer and catchment populations to support major non-food department and variety 'anchor' stores (such as, for example, John Lewis and Debenhams).

7.4 Anchor foodstores can therefore help to underpin the vitality and viability of smaller centres by 'clawing back' shoppers and expenditure from competing out-of-centre superstores and shopping locations, thereby generating more regular and frequent visits to town centres as a whole. This, in turn, increases shopper presence (or vitality) in centres from which other shopkeepers and businesses can benefit through 'linked trips' and 'spin-off' expenditure. If shoppers shop for food locally, research shows that they will be more inclined to resist other destinations for shopping, leisure and other activities.

7.5 The important contribution that 'anchor' foodstores can make to the overall vitality and viability of smaller centres is identified by the *Practice Guidance*, as well as by recent independent research by academic institutions and others. For example, the *Practice Guidance* refers to the positive impact of an edge-of-centre superstore which opened in Beverley in East Yorkshire in 2002. In this case a *"before"/"after"* study[‡‡‡‡] commissioned by the Council found that the new store had made a positive contribution to the health of the town centre, increasing the attraction of Beverley as a

‡‡‡‡ East Riding of Yorkshire Council (2003) *'Beverley Retail Study 2003'*, England & Lyle.

place to shop and visit, and reducing the 'leakage' of trade out of the town centre to competing out-of-centre superstores. For example, the research evidence found:

- a high level of 'linked trips' combining food shopping at the edge-of-centre store with other town centre shops and services (involving 65% of shoppers at the foodstore);
- significant evidence of 'linked trips' by shoppers travelling by all modes to the store;
- substantial 'claw back' of shoppers and trade (valued at £3.75m), which had resulted in increased footfall and "buzz" across the town centre;
- no significant fall in other food and convenience provision in the centre some 12 months after the new store had opened; and
- additional investment in the town centre in the first year of opening (including, for example, the opening of a new M&S Simply Food store).

7.6 This is a prime example of where a *"well-integrated"* scheme, located within easy walking distance of the town centre had encouraged linked trips to other shops and services. The store has provided additional choice for Beverley's shoppers; increased competition and choice in the local area; and is consistent with the policy objective of sustaining and enhancing the vitality and viability of town centres. The *Practice Guidance* concludes that: *"People may be more willing to walk between an edge of centre site and the PSA if they each have strong, complementary attractions"* (paragraph 6.7).

7.7 The 2009 research report by the *British Council of Shopping Centres* (BCSC) entitled *'Medium-Sized and Smaller Towns – Raising the Game'* also confirms the important role that foodstores have played and are playing as important 'anchors' to the regeneration and renaissance of smaller town centres. It specifically describes how the introduction and integration of foodstores in existing town centres can help to promote a vibrant independent sector by encouraging linked trips. The study also found that major redevelopment schemes offer the opportunity to rationalise and improve town centre car parking provision. In this case the proposed scheme will provide a significant increase in parking spaces for Hayle that will be shared with the town centre's other shops, businesses and attractions.

7.8 There is also considerable academic agreement with the proposition that the quality of foodstore provision is vital to both the maintenance and enhancement of the role of small towns, district centres and rural market towns in servicing their hinterlands. For example, the scoping paper prepared by the Oxford Institute of Retail Management (OXIRM) on behalf of the National Retail Planning Forum in 2004 referred to research by Somerfield and Tesco which indicated that between 40% and 45% of shoppers to a significant number of different stores in different locations carried out linked trips as part of their main food shopping trip.

7.9 More recent research by the *University of Southampton* also shows that foodstores in smaller towns can help to 'claw back' shoppers and trade from larger urban centres, resulting in a positive impact on the usage and turnover of existing shops and services. By way of example, their *"before"/"after"* case study research into the effects of the relocation of an out-of-centre foodstore to an edge-of-centre site in Shepton Mallet[§§§§] found that, *inter alia*, the 'linked trips' generated by the new edge-of-centre store ranged from 33% up to 64%. Other research based on case studies has identified similar benefits from new foodstore development to the vitality and viability of a range of different centres.

THE POSITIVE TRADING BENEFITS OF THE PROPOSED SCHEME

7.10 In our judgement the proposed retail and commercial leisure uses will provide a strong well-integrated complementary attraction to Hayle's existing retail offer and there will therefore be significant potential for linked shopping trips and visits to Foundry and Copperhouse town centres.

7.11 There is no accepted methodology for assessing the potential positive economic impact of 'linked trips' on town centres through new edge-of-centre 'anchor' foodstores, as well as other retail and commercial leisure developments. As a result, to help inform our assessment, we have drawn on the available research described above, along with the survey evidence for Hayle. The surveys conducted specifically asked whether people combined their main food shopping trip with other shopping, leisure and/or work activities[*****]. The headline results are as follows:

- The May 2007 household survey commissioned to inform the Penwith Retail Study asked whether households normally visited other shops, leisure or service outlets as part of their main food shopping trip (question 3). The survey results show that, on average, almost 50% of respondents across the eight survey zones do carry out other activities. Of these 6.3% "always" visit other shops, leisure or service outlets; 8.3% "normally" visit; and 25.4% "sometimes" visit. For each survey zone, the proportion of respondents that "always" or "normally" visit ranges from 9% to over 23%.
- The Hayle household survey commissioned by WYG in May 2009 asked what specific activities people carried out as part of their last main food shop (question 9). The survey results show that, on average (for the eight zones surveyed) some 5.1% carried out non-food shopping in town centres; 5.6% carried out "window shopping"; 3% visited cafes/restaurants; 1.5% participated in a leisure activity;

§§§§ Town & Country Planning (October 2009) *'Linked Trips and Town Centre Viability'*, Professor Neil Wrigley et al., School of Geography, University of Southampton

***** Please note that a question on 'linked' or 'combined' trips was not asked for non-food shopping.

and 7.8% visited services such as banks, dry cleaners and hairdressers in town centres. The range of 'linked' trips for different uses and activities varies across the eight survey zones. We note that for some zones the proportion of respondents carrying out non-food shopping in centres was over 10%.

- The Cornwall household survey also asked whether households combined their main food shop with other shopping, leisure or work activities. The survey results show that, on average, 5.2% "always" visit other shops, leisure or service outlets; 9.2% "normally" visit; and 21.2% "sometimes" visit. For Hayle (Zone 3) 5.9% stated that they "always" visit other shops, leisure or service outlets; 10.4% "normally" visit; and 33.3% "sometimes" visit. Of the total respondents in Zone 3, over 50% indicated that they combine their main food shop with other activities.

7.12 Drawing on the survey evidence and available research we consider that the application site has a number of locational benefits that we help to maximise the potential for significant linked trips with Foundry and the rest of Hayle to the benefit of the local economy and the vitality and viability of existing shops and businesses. The key location benefits of the scheme include, *inter alia*:

- It will be situated in a prominent position on the edge of Foundry town centre;
- The foodstore has been carefully designed to provide active frontage facing the town centre across Penpol Creek.
- The foodstore's entrance is closest to the Foundry area, with pedestrian and vehicular access off Carnsew Road to the south of South Quay.
- The scheme will be within easy walking distance of a large proportion of Hayle's households in and around Foundry. This will be particularly advantageous to those without access to a car, including the elderly, disabled and mothers with children.
- It will also be accessible by other modes of travel, including public transport (by bus and rail) and cycle routes.
- The proposal for a footbridge across Penpol Creek, connecting the foodstore's car park with Penpol Terrace and Foundry town centre, will create a strong retail circuit and provide a natural extension to Hayle's town centre uses and offer.

7.13 Based on our economic analysis, we forecast that the proposed new comparison and convenience goods floorspace could achieve a total turnover of between £25.5m and £37.2m (in 2008 prices), depending on its retail sales area and turnover performance. Of this total turnover, we forecast that the proposed foodstore has the potential to 'claw back' between £9m and £11.5m of convenience goods expenditure that is currently 'leaking' out of the PCA. We also forecast that the non-food retail floorspace has the potential to 'claw back' between £6.0m and £10.5m of comparison goods expenditure 'leakage'.

7.14 Based on the research and survey evidence, it is reasonable to assume that approximately 20% of the total 'clawed back' convenience and comparison expenditure would be converted into 'spin-off' expenditure to other shops, businesses and attractions in Hayle. This would be broadly equivalent to an additional £3.0m to £4.5m of additional expenditure being potentially available to other shops, businesses and facilities in Hayle.

7.15 In reality we consider that this will under-estimate the potential for 'linked trips' and 'spin-off' expenditure, as our economic assessment does not take account of the fact that the proposed scheme will:

- draw tourists and visitors to Hayle who are currently holidaying in the area, resulting in the potential for increased 'spin-off' expenditure and benefits to other shops, uses and tourist-related activities;
- provide new residential units on South Quay, resulting in an increase in Hayle's resident population and available retail expenditure;
- include a cinema, which will help to underpin the centre's early evening and night-time economy and generate significant linked trips in its own right; and
- result in a local multiplier effect. In simple terms where money is spent in local shops and on local services, that employ local people, who spend their wages in local stores, the initial expenditure – although the same quantity of money – would in benefit terms be multiplied in value to the local economy by being circulated within it.

SUMMARY

7.16 The proposed scheme presents a significant opportunity to generate 'linked trips', increased footfall and 'spin-off' expenditure to other shops and businesses in Hayle's two main centres, particularly Foundry Town Centre. Although it is difficult to quantify the potential uplift in town centre turnover that can arise from locating new anchor foodstores and retail floorspace in edge-of-centre locations, the research evidence indicates that it can be substantial where the proposed floorspace is well integrated with the town's existing shopping area. This is the case here.

8.0 IMPACT ASSESSMENT

8.1 The previous sections have assessed the potential (positive and negative) trading implications of the proposed convenience and comparison goods retail floorspace. In this section we consider the likely effects of the proposed development against the other inter-related retail planning 'tests' set out in Policy EC16.1 of PPS4 (also see **Section 3**). Please note, however, that we have not assessed the proposed scheme against Policy EC16.1.f as we are not aware of any *"locally important impacts"* on centres identified by the local planning authority (under Policy EC3.1.e of PPS4).

8.2 The wider economic development impact considerations under Policy EC10.2 are assessed in some detail by other supporting planning application documents. This notwithstanding, this section also provides an overview of the potential impact of the proposed scheme on Hayle's economic and physical regeneration, including the impact on deprived areas and social inclusion objectives (under Policy EC10.2.d), as well as the potential impact on local employment (under Policy EC10.2.e).

RETAIL & TOWN CENTRE IMPACT ASSESSMENT

Impact on Town Centre Vitality & Viability

8.3 Policy EC16.1.b requires that the impact of proposals on town centre vitality and viability be assessed, including the effects on local consumer choice and the range and quality of the comparison and convenience retail offer. As the *Practice Guidance* states, the various 'key' impacts are interrelated and judging their significance requires a *"...proper understanding of the vitality and viability of the centre, how it is changing over time and its vulnerability"*.

8.4 As our economic analysis in **Section 7** shows, the main trade diversion and impact of the proposed retail floorspace will be on out-of-centre foodstores and retail warehouses. This impact will result in positive benefits for Hayle and its local residents, as it will mainly represent the 'claw back' of car-borne shopping trips and expenditure 'leaking' out from the PCA and from Hayle's main town centres.

8.5 None of the forecast levels of trade diversion and impact identified under Policy EC16.1.d will harm the future trading potential of these other out-of-centre stores resulting in their closure. For example, both the Tesco and Morrisons stores in Penzance will continue to trade significantly above their 'benchmark' turnover levels following the impact of the proposed store. Notwithstanding this, the forecast impact on these out-of-centre stores and retail warehouses is not a planning issue per se, but reflects increased choice and competition in the local area.

8.6 To help inform our assessment of the potential consequences of the forecast levels of trade diversion and impact on Hayle, we have undertaken detailed health check assessments of Foundry and Copperhouse Town Centres (see **Appendix 2**). The key headline findings of our assessment were also described in **Section 5** to this RPA. Our impact assessment is therefore informed by a full understanding of the retail composition, attraction and offer of the two main centres. Overall the key performance indicators (KPIs) for both centres show that, *inter alia*:

- Foundry and Copperhouse are attractive, vital and viable centres.
- Each centre has low vacancy levels benchmarked against the national average.
- The centres have a relatively good mix of independent and national multiple retailers and service businesses.
- Both centres serve the more frequent ('day-to-day') shopping and service needs of their local resident catchment population, as well as catering for visitors and tourists. They also have a good choice of places to eat and drink.
- Footfall levels across both centres are strong.
- The smaller convenience stores in both centres primarily function as top-up ('basket') shopping locations.
- The Co-op on Copper Terrace has a limited market share of main 'bulk' food shopping trips and expenditure in Hayle (Zone 3).
- There is an identified need for a foodstore anchor to help 'claw back' shoppers and expenditure from competing superstores outside of Hayle.
- There is also an under-provision of larger format non-food stores in Hayle to enable the town centre to compete with other out-of-centre shopping locations (such as, for example, West Cornwall Shopping Park) and draw back shoppers from other centres and out-of-centre shopping facilities.

8.7 Against this background, we conclude that the forecast levels of trade diversion and impact arising from the proposed development will not have a significant adverse impact on the overall vitality and viability of either Foundry or Copperhouse Town Centres.

8.8 The fact that vacancy levels in both Hayle are significantly below the national average is a positive sign of the overall health of both centres at the present time, particularly given the impact of the economic recession on many of Britain's high streets and shopping locations. The proposed development is unlikely to lead to an increase in vacancies in either town centre, as the majority of shoppers and retail expenditure will be diverted from existing large format superstores and retail warehouses beyond the PCA, rather than from smaller shops and stores in the town centre.

8.9 For **Foundry Town Centre** the proposed food and non-food retail scheme has been carefully designed so that the location, layout and associated car parking will be fully integrated with the town centre. The proposal will extend, 'anchor' and strengthen the town centre's overall retail offer, drawing shoppers into the town centre more regularly and frequently than at present. Other businesses and operators in the centre will benefit from the increased propensity for 'linked trips' and the resultant uplift in footfall, retail activity and 'spin-off' expenditure. In this way, the proposed foodstore will bring positive benefits to the centre as a whole (see **Section 8**). At the same time, the centre's overall attraction, vitality and viability will be reinforced by its wider uses and services including its banks, cafes, restaurants, public houses, hairdressers, etc., that will help to promote 'linked trips' and draw people to the centre on a day-to-day basis. Furthermore, the planned improvements to South Quay and harbour frontage will increase the attraction of the centre to visitors and tourists.

8.10 For **Copperhouse Town Centre**, we do not consider that the forecast level of convenience goods trade diversion and impact on the Co-op will result in the store's closure, or harm to the overall vitality and viability of the town centre. As Tables 13 and 14 in **Appendix 7** show, the Co-op is forecast to achieve a 'potential' turnover of between £7.1 and £7.6m in 2015 (at 2008 prices) following the opening of the South Quay foodstore, which would be substantially higher than its forecast 'benchmark' turnover of £5.3m.

8.11 Overall the proposed complementary retail floorspace will significantly widen the choice of convenience and comparison goods retailing in Hayle. As described in **Section 5**, Hayle currently lacks the scale, range and quality of food and non-food retailing that would normally be expected for a centre of its size and status. The location of the proposed foodstore and non-food retail floorspace on this highly accessibly edge-of-centre site will clearly have a substantial positive impact on the overall health, attraction and performance of Hayle's daytime and evening economy.

8.12 As previously stated, the retail proposals have the potential to encourage a greater proportion of local residents to undertake their main 'bulk' food shopping and comparison goods shopping in Hayle in preference to their current longer distance trips to Penzance, Camborne and other shopping locations. This would represent a positive impact of the proposed development on the overall vitality and viability of Hayle, resulting in more sustainable shopping patterns. As we have demonstrated in **Section 8**, the positive economic benefits of the application proposal will significantly outweigh any potential negative impacts.

Impact on Planned Investment

8.13 Policy EC16.1.a requires the assessment of the impact of proposals for main town centre uses that are not in a centre and not in accordance with the development plan on existing, committed and planned public and private investment in a centre or centres in the catchment of the proposal.

8.14 The shopping offer in both Hayle's main centres has not benefitted from significant public or private sector investment for a number of years. In the meantime, the majority of new investment in the area has been directed to out-of-centre facilities including West Cornwall Shopping Park, resulting in the further loss of shoppers and retail expenditure to these out-of-centre locations. It is commonly accepted that "standing still" is akin to decline in retail planning and commercial terms. If the retail offer in out-of-centre locations continues to expand and strengthen then clearly to maintain and enhance the overall performance and attraction of Hayle's town centres the retail offer in these centres must be of the scale and nature to effectively compete with these out-of-centre attractions and other competing town centres.

8.15 The Harbourside Regeneration represents the most significant public / private sector investment planned for Hayle. The 2007 PRS also concluded that the South Quay site was: *"... one of the most important redevelopment sites in the whole of Penwith District and is key to the regeneration of Hayle".* As described in Sections 2 and 3, the Harbourside Regeneration is being brought forward in line with the 'saved' site specific Proposal TV-D which identifies South Quay / Foundry Yard, North Quay and East Quay for mixed use redevelopment for uses within Classes A1-A3, B1-B2, B8, C1, C3 and D1-D2. Planning permission has been granted and the details are described in full in the supporting **Planning Statement** prepared by Planning Perspectives LLP.

8.16 Although South Quay / Hayle Harbour is not within an identified town centre, the major investment and regeneration planned for the Harbourside, including significant Class A1 retail floorspace, will have a positive impact on Hayle's economy and its town centres. The hybrid application for South Quay and the Foundry Car Park site will act as a catalyst to help 'kick start' the wider regeneration of Hayle Harbour.

8.17 Thus, rather than having a negative impact on planned investment, the application proposals represent a substantial investment and *"vote of confidence"* by ING RED UK (Hayle Harbour) Limited in the town and its future, particularly during the current economic recession. It will help to *"ignite"* business and market confidence over the short, medium and longer term, resulting in further new investment and development as part of the overall approved masterplan. As a consequence of this uplift in business and investment confidence, the proposed scheme will generate significant new additional investment and market interest in Hayle's town centres, thereby helping to enhance their overall vitality and viability in accordance with PPS4.

Impact on Allocated Sites Outside Town Centres

8.18 Policy EC16.1.c states that applications for retail and other main town centre uses that are not in a centre or in accordance with an up to date development plan should assess the impact on allocated sites outside town centres being developed in accordance with the development plan.

8.19 As described above, the South Quay and Foundry Yard sites subject to this application are covered by the 'saved' site specific Proposal TV-D. The proposal allows for

13,198m^2 of food, drink and retail space, along with 1,039 new dwellings of mixed type and size, a hotel, fitness gym, business centre and other uses and facilities.

8.20 At the time, the applicant indicated that detailed planning applications would be brought forward for the various elements of the masterplan based upon prioritising the areas according to the regeneration needs and market opportunity. In developing the proposals for South Quay and Foundry Yard ING has had regard to the masterplan and the Council's aspirations for the regeneration of Hayle Harbour. The rationale for the proposed retail and mixed use development is to create a seamless and successful town centre extension that will generate high levels of 'linked trips' and thereby benefit the town centre's overall vitality and viability.

8.21 Apart from the harbour area, the only other allocation on the edge of the existing centres is for a heritage centre, craft workshops and ancillary retail outlets in the Foundry area, to the south of the application site. The Local Plan proposes a different form of development to that envisaged for the South Quay site and therefore we do not consider the application represents a serious risk to the delivery of new development within the Foundry area. On the contrary, it is highly likely that the redevelopment and regeneration of the application site will have a significant positive benefit on the delivery of the development plan policy for the Foundry area.

8.22 It is our view that the redevelopment of South Quay and Foundry Yard will significantly improve the attraction of this part of Hayle, resulting in increased activity, viability and the potential for linked trips during the daytime and evenings with both the town centre and the proposals to the south of the application site.

Whether the Proposal is of an Appropriate Scale?

8.23 For applications for retail and other main town centre uses located in or on the edge of a town centre, Policy EC16.1.e requires an assessment of whether the proposal is of an appropriate scale in relation to the size of the centre and its role in the hierarchy of centres.

8.24 The *Practice Guidance* states at paragraph 7.33 that the assessment of what constitutes an *"appropriate scale"* involves considering whether a proposal is consistent with the role and function of the town centre and its catchment, as specified in the network or hierarchy set out in the Council's LDF. Other relevant considerations include the consistency or otherwise of the scale of any proposal with similar facilities at other centres at a similar level in the retail hierarchy and the scale of the proposal itself relative to similar retail developments in those centres.

8.25 The guidance also states that where development plans set out an indication of the scale of new development likely to be appropriate in these centres, then it will be clear whether a proposal is of an appropriate scale. In other cases it will be relevant to consider the effects of the proposal against the other key tests (such as, their accessibility to their intended catchment and impact on nearby centres).

8.26 Another important indicator of the appropriateness of a proposal's scale is whether there is a demonstrable need based upon current / forecast expenditure and current market shares. The guidance states at paragraph 7.35 that where a *"...significant increase in market share, and/or an extension of the town centre catchment area is required to support the scale and form of development, it may be relevant to consider the impact of such an increase on neighbouring centres"*. Equally, the guidance states that in reaching a balanced judgement, *"...it may be relevant to consider the positive effects of the proposed scale of development"*. These positive impacts include, *inter alia*, employment benefits, infrastructure improvements and the economic regeneration of areas of social deprivation. The positive economic development benefits of the proposed scheme under Policies EC10.2.d and EC10.2.e are considered separately in **Section 10**.

8.27 It is against the advice set out in PPS4 and the *Practice Guidance* that we consider the appropriateness of the scale of comparison and convenience goods retail floorspace.

Whether the proposals could be accommodated in whole or in part on more central sites in other centres (i.e. the sequential approach).

8.28 We have demonstrated in **Section 6** that there are no sequentially preferable sites in either Copperhouse or Foundry Town Centre that can accommodate the overall scale of convenience and comparison goods floorspace proposed to meet the identified need for Hayle and achieve a *"step change"* in retail offer.

Whether the proposals are consistent with the role and function of the town centre and its catchment

8.29 The extant and emerging development plan policies relevant to the assessment of the role and function of Hayle have been outlined in **Section 4**. The Cornwall Structure Plan identifies Hayle as an *"other main town"* that has the capacity to meet the needs of the surrounding area, as well as its own population. Policy 14 also places priority on the improvement and enhancement of town centres to providing shopping and other uses that meet the needs and aspirations of the whole community. Furthermore, Policy TV-1 of the adopted 2004 Penwith District Local Plan seeks to focus new development in the District's major town centres (including Hayle) and maximise the use of previously developed land. Policy TV-16 also seeks to promote new development in town centres first, followed by edge-of-centre locations. Site specific Proposal TV-D allocates the harbour area for mixed-use development incorporating significant new food, drink and retail space (13,198m^2) that will be closely integrated with the town centre in terms of location, orientation and pedestrian movement.

8.30 The 2007 PRS is also material to our assessment, as the study concluded that in terms of an appropriate 'strategy response', Hayle was the settlement within Penwith which was *"...most in need of a step change in retail provision and shopping patterns behaviour"* (paragraph 7.9). In this context it recommended an increase in market shares through new retail development to help stem the 'leakage' of shoppers from Hayle and retain larger amounts of convenience and comparison expenditure within the town. Against this background we note that Penwith District Council also made representations on the emerging Regional Spatial Strategy for the South West (RSS) to promote Hayle within Development Policy B. This states that the scale and mix of developments should increase self-containment of the places identified; develop their function as service centres; and secure targeted development which can address regeneration needs.

8.31 We consider that the proposed scale of food and non-food retail floorspace, in combination with the existing town centre floorspace, would be in keeping with Hayle's status as an *'other main town centre'* when considered against the Strategic Urban Centres of Penzance and Camborne (as defined by Policy 16 of the Structure Plan). The proposal will therefore be consistent with Hayle's overall role and function in the shopping hierarchy, and the strategic objective of achieving a *"step change"* in its retail provision and shopper behaviour identified by the 2007 PRS. In our judgement the application proposals provide an unrivalled opportunity for new investment and development in Hayle to help meet all aspects of the spatial strategy and act as a catalyst for the wider harbour regeneration.

The scale of development considered against other stores and centres.

8.32 The proposed foodstore will have a total sales area of 2,550m^2 net of which 1,658m^2 will be set aside for convenience goods retailing and 893m^2 for comparison goods. The three proposed non-food (Class A1) retail units will have a total estimated sales area of 1,256m^2 net (assuming that all the mezzanine space is set aside for retail sales).

8.33 Table 4 (**Appendix 7**) shows that currently Copperhouse and Foundry Town Centres have a total convenience goods sales area of 1,424m^2 (including Co-op), which is less than the combined sales areas of the Lidl and M&S Simply Food stores (1,591m^2). In other words the town centres' convenience goods sales area represents less than half of the total current provision in Hayle.

8.34 All the household surveys conducted since 2007 have clearly demonstrated that there is a significant leakage of main food and comparison goods shopping trips to large food superstores and retail warehouses outside Hayle and its PCA. The proposed foodstore will have a smaller sales area than Tesco Extra at Station Road in Pool/ Redruth (6,503m^2 net); the Morrisons stores in Penzance (2,657m^2 net) and Pool/ Redruth (2,807m^2 net); and the Tesco in Helston. We therefore conclude that the proposed foodstore is proportionate in scale terms to these existing larger superstores (some of which are subject to plans/ proposals for extension).

8.35 The proposed maximum comparison goods sales area of 2,413m^2 net[†††††] is also significantly less than the estimated 10,041m^2 net of retail warehouse space in Camborne, as identified by the 2008 *Kerrier Retail Study*. It is also lower than the existing out-of-centre retail floorspace on the West Cornwall Shopping Park. The proposed non-food retail floorspace is therefore in scale with the overall role and function of Hayle in the shopping hierarchy.

Whether, there is a demonstrable need based upon current / forecast expenditure and current market shares.

8.36 As described in **Section 4**, the 2007 PRS forecast capacity for 1,600m^2 net of new convenience goods floorspace by 2016, increasing to 1,750m^2 net by 2021 based on a theoretical uplift in Hayle's retention of convenience goods expenditure to 70%. The study concluded that this new sales area should be provided in the form of a single major foodstore to help bring about a 'step change' in Hayle's retail offer. In this context, the proposed store will have a convenience goods sales area of 1,658m^2 net and is therefore consistent with the capacity range forecast by the 2007 PRS.

8.37 The Council's retail study also identified the capacity for 2,900m^2 net of new comparison goods floorspace by 2016 increasing to 4,000m^2 net by 2021. The total proposed non-food retail sales area of 2,413m^2 net is therefore also consistent with the forecast quantitative need.

8.38 For convenience goods retailing, we forecast that the proposed superstore on South Quay will increase the retention level in the Hayle area (Zone 3) from 44% to 72.4% for a store trading at £10,000 per m^2. If the store achieves a higher sales performance of £13,000 per m^2 then the retention level is forecast to increase to approximately 80%. We consider that this uplift is reasonable and is broadly consistent with the *"theoretical"* retention level assumed by the 2007 PRS, particularly as the PRS was not based on a specific proposal.

8.39 For comparison goods retailing, we forecast that the proposed non-food retail floorspace will increase the retention of comparison goods expenditure in the Hayle area (i.e. defined as Zone 3 for the Cornwall-wide survey and comprising Zones 3 and 4 of the 2007 PRS) from 10.2% (for both town centre and out-of-centre retailing) to between 16.1% and 20.7%, depending on the assumed turnover levels for the new floorspace.

††††† Please note that this total sales area assumes all the mezzanine floors in the proposed non-food scheme and the ancillary units on South Quay are used for non-food retail sales.

8.40 Finally, although there is no named operator for the proposed store and non-food retail units at the planning application stage, the design and layout of both retail schemes will provide the necessary sales area, servicing and car parking provision required by modern operators. This will enable the eventual operators to compete effectively with larger and similar sized superstores and retail warehouses in Camborne, Penzance, Pool and Redruth. In order to achieve the key objective of a *"step change"* in Hayle's retail offer, it is therefore crucial to the success and viability of the proposed floorspace that it is capable of selling a similar range and depth of goods and product lines as the competing stores and retail warehouses in the wider catchment area. This will mean that customers currently travelling to the competing stores and retail warehouses outside Hayle will have a similar level of choice to meet their overall shopping needs.

8.41 We conclude that the application proposals are of an *"appropriate scale"* to help maintain and enhance the role and function of Hayle. We assessed the potential positive effects of the proposed scale of development in detail in **Section 8**.

ECONOMIC DEVELOPMENT IMPACT ASSESSMENT

8.42 Policy EC10.1 of PPS4 states that local authorities should adopt a positive and constructive approach towards planning applications for economic development, including retailing, and applications that secure sustainable economic growth should be treated favourably.

8.43 Policy EC10.2 sets out five wider impact considerations for all planning economic development applications, including retail, that should be considered alongside the key retail impact 'tests' under Policy EC16.1. The impact considerations covering sustainability and climate change (EC10.2.a); accessibility and traffic; (EC10.2.b); and design issues (EC10.2.c) are covered in detail by other supporting planning documents and are not repeated here. Notwithstanding this, the following provides a brief overview of the likely economic and physical regeneration impact of the proposal (EC10.2.d) and the impact on local employment (EC10.2.e), as these are material to the assessment of the proposed scheme's wider impacts under Policy EC17 of PPS4.

Impact on Economic & Physical Regeneration

8.44 In terms of the potential impact on the economic and physical regeneration of Hayle, we have described in some detail how the mixed use proposal is in accordance with the key aims and objectives of the Council's extant (and emerging) development plan policies and proposals, and the wider Harbourside Regeneration masterplan. We strongly believe that the proposed foodstore anchor, non-food shop units and proposed cinema will help to achieve the *"step change"* in retail provision and shopping patterns identified by the 2007 PRS.

8.45 The application is in accordance with the Government's overarching objective for sustainable economic growth and development as set out in PPS1, PPS4 and other national planning policy statements. For example, when considered against the Government's key objectives, the proposal will help to:

- improve the economic performance of Hayle and build a more prosperous community;
- promote regeneration and tackle deprivation in the local area;
- deliver more sustainable patterns of development, reducing the need to travel by car and respond to climate change;
- enhance and promote the overall vitality and viability of Hayle's town centres:
- promote competition and enhance consumer choice to meet the genuine needs of the entire community and particularly socially excluded groups;
- conserve and enhance the historic, archaeological and architectural heritage of Hayle Harbourside to provide a sense of place and a focus for the community; and
- provide a wider range of retailing and services to the local community in an attractive and safe environment, thereby remedying the deficiencies in an area with relatively poor access to a wide range of facilities.

8.46 It is also apparent that Hayle suffers from serious economic and social deprivation and is a priority for strategic spatial investment. This is at the heart of the Council's vision and policy objectives for the regeneration and development of the wider Hayle Harbourside. The foodstore, comparison goods floorspace and wider mix of uses planned for South Quay and the Foundry Yard site will therefore bring significant benefits to the local community and local economy. The proposed development will be socially inclusive and will help to, *inter alia*, promote greater competition with similar foodstores elsewhere, resulting in reduced prices and product offers to the benefit of customers; increase accessibility to key shops and facilities by a choice of means of transport; and increase access and choice for those local residents without a car.

Impact on Local Employment

8.47 The proposal represents a substantial investment in Hayle and the *Harbourside Regeneration* initiatives. It will help to deliver new job opportunities to the local population; increase the level of high quality employment; and engage groups that face particular barriers to accessing employment opportunities. It will also provide employees with relatively flexible working patterns, which is of particular value to students and parents who may combine work with study and childcare respectively.

8.48 PPS4 emphasises the benefits of retail jobs alongside other more traditional employment sectors. Research indicates that the retail sector has proved a key employment creator in areas where traditional manufacturing has declined. The sector is generally recognised as employing a wide range of different socio-economic groups including low income families and minority and ethnic groups, promoting and supporting social inclusion. These benefits extend well beyond the new shops themselves. For example, it is estimated that for every 100 retail jobs created nationally, an additional 50 indirect and induced jobs will be created elsewhere.

8.49 The detailed analysis set out in Chapter 13 of the **Environmental Statement** forecasts that the proposed retail floorspace will result in between 336 and 362[‡‡‡‡‡] new full time and part time equivalent jobs. These jobs are likely to appeal mainly to local people. Please note that the net employment benefits of the proposed scheme do not take account of the new jobs generated during the construction phase and other linked employment.

8.50 Although there is no named operator for the foodstore at the planning application stage, it will appeal to all the major grocery retailers (if granted planning permission) who all operate wide ranging and successful employment training programmes. These range from apprenticeships through to management training. All the major grocery operators also have initiatives in place to help the long term unemployed re-enter the workplace. In addition, all the retailers who will take space in the proposed scheme will be able to provide competitive pay and benefits to their employees, alongside other financial benefits.

SUMMARY

8.51 The proposed retail scheme is unlikely to have any harmful impacts on Hayle when considered against the relevant town centre impact 'tests' under Policy EC16.1 of PPS4 and the wider economic development impact considerations under Policy EC10.2.d and EC10.2.e. On the contrary we consider that the proposed retail floorspace and cinema will have a positive impact on Hayle through the redevelopment of this important gateway site on the edge of the town centre, with consequential regeneration benefits for South Quay and Foundry Yard.

‡‡‡‡‡ Please note that the employment range is dependent on the end use of the ancillary retail units on South Quay. If these units are taken up by Class A3 uses then the higher employment figure will apply.

9.0 CONCLUSION

9.1 This RPA has set out the retail planning and wider economic development considerations material to the assessment of the planning application by ING for a new foodstore, cinema and ancillary uses on South Quay, along with complementary non-food retail units on the Foundry Yard site.

9.2 The proposed retail and commercial leisure uses are planned to address a clear deficiency in Hayle's offer, as identified by the Council's own retail study. The application will also act as a major catalyst for ING's wider planned investment and regeneration of Hayle Harbour.

9.3 The RPA has been prepared in the context of the relevant development plan and national planning policy statements (i.e. PPS4), along with other material considerations.

9.4 Based on the evidence submitted, it is concluded that the proposed retail floorspace is in accordance with Policy EC17.1 of PPS4.

9.5 Under Policy EC15 the assessment has demonstrated that there are no suitable, viable or available sites either in or on the edge of Hayle that are sequentially preferable to the application site. The proposed scheme is therefore in compliance with Policy EC17.1.a of PPS4.

9.6 It has also been demonstrated that the proposal is not likely to lead to any *"significant adverse impacts"* in terms of any one of the retail and town centre impacts under Policy EC16.1, taking account of the likely cumulative effect of recent permissions, developments under construction and completed developments. The application proposal is therefore also in compliance with Policy EC17.1.b.

9.7 Where the evidence shows there is no *"significant adverse impacts"* it will be necessary for the decision maker (in this case the local planning authority) to balance the positive and negative effects of proposals against the criteria set out in Policies EC10.2 and EC16.1, together with any other local considerations and other wider material considerations in reaching an overall planning judgement.

9.8 In this context, we conclude that the proposed scheme will result in significant positive retail and economic benefits for Hayle's overall vitality and viability. These will need to be taken into account by the local planning authority when assessing the overall merits of the planning application.

9.9 By way of summary, this application is intended to make a significant contribution to Hayle's wider shopping, service and leisure offer. The survey evidence and research clearly demonstrates that Hayle's catchment population currently has to travel unsustainable distances by car to shopping and leisure facilities located outside the PCA. The proposed scheme is intended to enhance Hayle's attraction as a retail and leisure destination and reduce the need for lengthy car-borne trips. The 'claw back' of shoppers and retail expenditure will help to strengthen the overall vitality and viability of Hayle's two main centres and achieve the *"step change"* in its retail offer identified by the 2007 *Penwith Retail Study*. In our judgement the potential for significant 'spin off' expenditure and multiplier effects generated by 'linked trips' will outweigh any impacts on centre turnover forecast under Policy EC16.1.d.

9.10 The proposed scheme also represents the first phase of significant new investment planned by ING for Hayle. It will help to raise community, business and investment confidence in Hayle's future, in accordance with national, regional and local planning policy. It will also result in the regeneration of a redundant, unattractive and largely derelict site that currently contributes nothing to Foundry town centre and the local community in economic, social or design terms. The high quality scheme proposed at this important western 'gateway' to Hayle, along with public realm improvements and the proposed pedestrian bridge over Penpol Creek, will significantly improve the overall character, quality and attractiveness of Hayle as a place to shop and visit for a range of activities and uses during the daytime and evenings.

9.11 In conclusion the proposed retail and cinema uses will make a significant contribution to Hayle's local daytime and evening economy, as well as the overall vitality and viability of its two main centres. It will improve Hayle's retail offer, attraction and competitiveness as a shopping location for its catchment population and, critically, it will help to retain shoppers and expenditure currently 'leaking' to out-of-centre stores. It will provide a highly sustainable mixed use development on the edge of Hayle that is in accordance with the Government's key objectives for town centres. The scheme will also result in greater consumer choice and competition in accordance with national policy advice.

9.12 We therefore conclude that the proposed retail floorspace is fully justifiable and is in accordance with the relevant policies and provisions of PPS4 and the development plan.

GLOSSARY

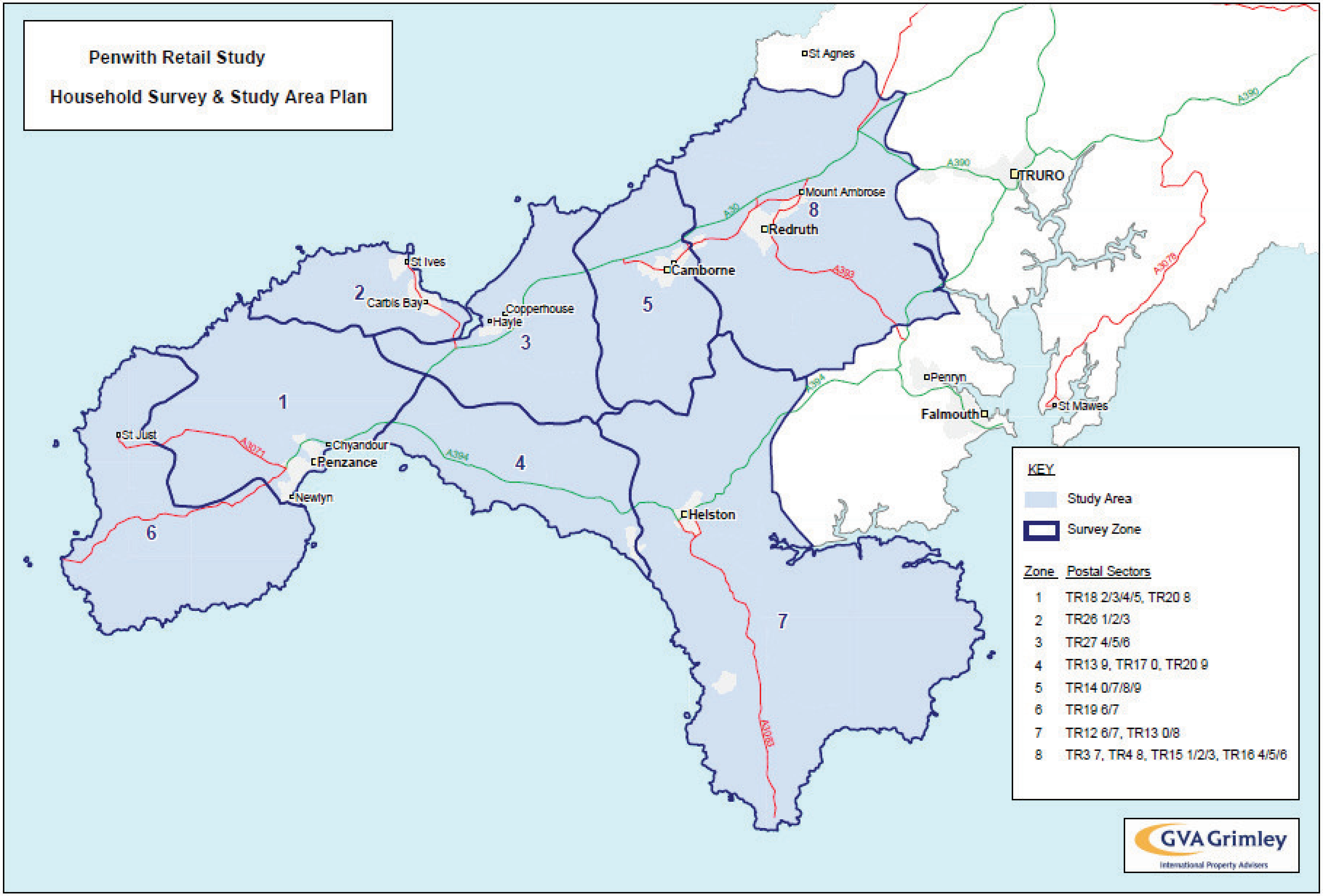
TOWN CENTRE	Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on a proposals map.
PRIMARY SHOPPING AREA (PSA)	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.
PRIMARY FRONTAGE	Primary frontages are likely to include a high proportion of retail uses.
SECONDARY FRONTAGE	Secondary frontages provide greater opportunities for a diversity of uses.
EDGE-OF-CENTRE	For retail purposes, a location that is well connected to and within easy walking distance (ie. up to 300 metres) of the primary shopping area. For all other main town centre uses, this is likely to be within 300 metres of a town centre boundary. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances. For example, local topography will affect pedestrians' perceptions of easy walking distance from the centre. Other considerations include barriers, such as crossing major roads and car parks, the attractiveness and perceived safety of the route and the strength of attraction and size of the town centre. A site will not be well connected to a centre where it is physically separated from it by a barrier such as a major road, railway line or river and there is no existing or proposed pedestrian route which provides safe and convenient access to the centre.
OUT-OF-CENTRE	A location which is not in or on the edge of a centre but not necessarily outside the urban area.
OUT-OF-TOWN	An out-of-centre development outside the existing urban area.
CONVENIENCE SHOPPING	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery.
SUPERMARKETS	Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.
SUPERSTORES	Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.
COMPARISON SHOPPING	Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.
RETAIL WAREHOUSES	Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers.
RETAIL PARKS	An agglomeration of at least 3 retail warehouses.
CONVENIENCE GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP categories: Food and non-alcoholic beverages/ Tobacco/ Alcoholic beverages (off-trade)/ Newspapers and periodicals/ Non-durable household goods.
COMPARISON GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP Categories: Clothing materials & garments/ Shoes & other footwear/ Materials for maintenance & repair of dwellings/ Furniture & furnishings/ carpets &

	other floor coverings/ Household textiles/ Major household appliances, whether electric or not/ Small electric household appliances/ Tools & miscellaneous accessories/ Glassware, tableware & household utensils/ Medical goods & other pharmaceutical products/ Therapeutic appliances & equipment, Bicycles/ Recording media, Games, toys & hobbies/ sport & camping equipment/ musical instruments/ Gardens, plants & flowers/ Pets & related products/ Books & stationery/ Audio-visual, photographic and information processing equipment/ Appliances for personal care/ Jewellery, watches & clocks/ Other personal effects.
SPECIAL FORMS OF TRADING	All retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, party plan, vending machines, door-to-door and market stalls.
GROSS GROUND FLOOR FOOTPRINT FLOORSPACE	The area shown on the Ordnance Survey map or other plans as being occupied by buildings and covered areas measured externally.
GROSS RETAIL FLOORSPACE	The total built floor area measured externally which is occupied exclusively by a retailer or retailers; excluding open areas used for the storage, display or sale of goods.
NET RETAIL SALES AREA	The sales area within a building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.
RETAIL SALES DENSITY	Convenience goods, comparison goods or all goods retail sales (stated as including or excluding VAT) for a specified year on the price basis indicated, divided by the net retail sales area generating those sales.
FLOORSPACE EFFICIENCY FACTOR	The percentage by which a retail sales density is assumed to increase annually in real terms over a stated period.

– End -

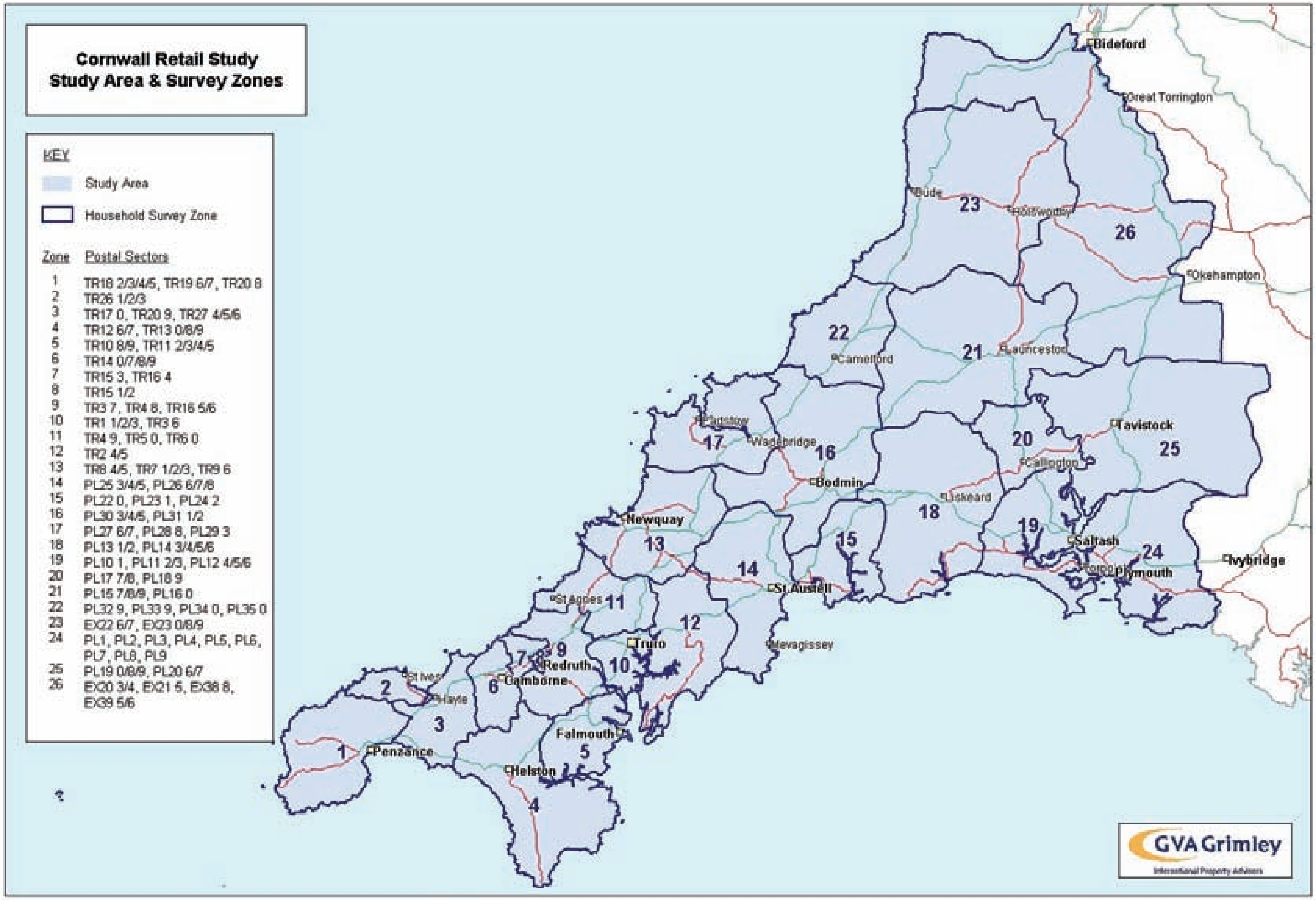
APPENDIX 1: PRIMARY CATCHMENT AREA & STUDY ZONES

Plan 1:



Penwith Retail Study
Household Survey & Study Area Plan
St Agnes
TRURO
Mount Ambrose
8
Redruth
St Ives
2
Carbis Bay
Copperhouse
Hayle
3
Camborne
5
A30
A390
A3078
A393
A394
A3071
A3083
Penryn
Falmouth
St Mawes
1
St Just
Chyandour
Penzance
Newlyn
4
6
Helston
7
KEY
Study Area
Survey Zone
Zone
Postal Sectors
1 TR18 2/3/4/5, TR20 8
2 TR26 1/2/3
3 TR27 4/5/6
4 TR13 9, TR17 0, TR20 9
5 TR14 0/7/8/9
6 TR19 6/7
7 TR12 6/7, TR13 0/8
8 TR3 7, TR4 8, TR15 1/2/3, TR16 4/5/6
GVA Grimley
International Property Advisers

Plan 2:



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APPENDIX 2: TOWN CENTRE HEALTH CHECK ASSESSMENT

APPENDIX 2: TOWN CENTRE HEALTH CHECK ASSESSMENT

1.1 The adopted Local Plan identifies two separate town centres in Hayle, namely Foundry and Copperhouse. Each has its own defined town centre boundary. The division is based on the industrial heritage of the Hayle and the development of the town around Foundries of Harvey & Co. and Cornish Copper Co.

Key Performance Indicators

1.2 Our health check assessment has been prepared in accordance with advice set out in PPS4. However, it is important to state at the outset that there is no Experian Goad data on the retail provision in either of the town centres, as they are too small to be audited. As a result we have carried out our own audits of retail and service provision in both centres and these are set out in Appendix A and B to this assessment. Our commentary on each centre is therefore made in the context of a full understanding of their structure, character and retail offer.

1.3 In addition, there is also no published data on commercial retail rental levels, retailer demand and commercial yields in these centres. In broad terms our assessment has identified the following:

- **Prime Zone A Rental Levels** – are not usually available for smaller centres, as there is generally a limited turnover or "churn" of operators. Notwithstanding this, the majority of small businesses normally assess their rents in overall annual terms and not in £ per sq m. We have not been able to ascertain rental values for either Copperhouse of Foundry in this case.

- **Retailer Demand** – For larger cities, towns and shopping destinations (such as Penzance town centre for example) demand from retailers for representation is generally strong and published evidence is readily available. Lower down the retail hierarchy market demand is generally more limited in smaller towns and centres. Consequently, it is very difficult to record and identify retailer requirements. Notwithstanding this, our assessment shows that vacancy levels in both centres are significantly below the national average and there is no evidence of long term vacancies in either centre. It can therefore be deduced from this that demand for representation in both centres is relatively buoyant.

- **Commercial Yields** - It is not possible to provide an indicative retail yield for these town centres, since the value of known deals relates more to the occupier than to the centre itself.

1.4 The limited available information therefore makes it is difficult to analyse Foundry and Copperhouse town centres against all the key performance indicators (KPIs) outlined in PPS4. Notwithstanding this, we assessed the following KPIs in more detail:

- diversity of uses;
- retailer representation;
- vacancies;
- pedestrian footfall;
- accessibility; and
- environmental quality.

FOUNDRY TOWN CENTRE

1.5 Foundry is a linear high street running along Penpol Terrace and "forking" into Foundry Square at its southern end. The presence of the harbour frontage, which runs immediately adjacent to the town centre, provides an attractive maritime setting to the centre.

Diversity of Uses

1.6 The centre has a complementary range of national multiple and independent convenience, comparison and service operators trading from small units. A full list of the operators in the centre is appended to this assessment. For a centre of its size it benefits from a relatively strong line-up of national multiple retailers including Martin's, Post Office, Boots, Spar, Lloyds TSB and Barclays. The shops and services have excellent frontage on to Penpol Terrace, which maximises the potential to 'capture' passing car-borne traffic through the town and people walking to and from the nearby train station and harbour area.

1.7 The table below shows the good mix of retail and service facilities.

Table 1.1: Foundry Town Centre – Diversity of Uses

Uses	Representation
Convenience store	Spar
Baker	Warrens; Philip's (x2)
Butcher	Hampsons of Hayle
Chemist	Boots
Greengrocer	The Farm shop; Colins Market Garden
Off-licence	Available in the Spar
CTN	Martins
Post Office	Incorporated into Martins
Banking Facilities	Lloyds TSB; Barclays

Source: Strategic Perspectives

1.8 In addition there are two public houses (The Royal Standard Inn and Foundry Bar); a good range of restaurants, cafes and take-aways; hairdressers; estate agents; hotels and bed & breakfast accommodation. Visitors and tourists to the area and centre also contribute to its overall vitality and viability.

Vacancies

Out of a total of 47 retail premises (excluding Pratt's Market) recorded by our audit, there were only 3 vacant premises. This represents a vacancy level of 6.4%, which is significantly below the national 'benchmark' average for all circa 1,200 centres monitored by Experian Goad of over 12%. This is a positive indication of the overall robust health of the centre.

Pedestrian Flows

1.9 From our visual inspection of the centre based on various different days we identified relatively strong pedestrian activity.

Accessibility

1.10 Foundry town centre is easily accessible by a variety of transport modes. Hayle train station is located close to Foundry Square and connects Hayle with the main London to Penzance railway line, with a branch line from nearby St Erth to St Ives. There are also bus stops strategically positioned throughout the centre that provide frequent and regular bus services to satellite towns and villages in Hayle's hinterland. Car parking is available in the Foundry Square car park and off-street parking bays. The centre is easily accessible by foot for local residents and by bicycle.

Environmental Quality

1.11 The town centre's historic nature and attractiveness is recognised by its designation as part of the Hayle Conservation Area. The historic core, especially within the vicinity of Foundry Square, has a strong character and identity. An environmental enhancement scheme has resulted in various improvements to the town centre over recent years, including the *Hayle Townscape Heritage Initiative* (THI) and *Heritage Economic Regeneration Scheme* (HERS) which was completed in June 2008. Projects in the Foundry area also include the transformation of the Foundry Farm complex at Harvey's Foundry into workspace and affordable housing; and the refurbishment of White's Warehouse, which is now fully occupied with businesses, a restaurant and complementary public realm improvements at Foundry Lane and Foundry Square.

1.12 Overall, we consider that Foundry town centre is has an attractive environment and is well-maintained, with a good provision of street furniture, landscaped areas, lighting, trees and litter-bins. There is also no obvious negative crime perception or signs of graffiti or litter in the centre.

Summary

1.13 To summarise, Foundry town centre is a vital and viable centre serving the more frequent day-to-day shopping and service needs of the local population. It has a relatively good mix of national multiple and smaller independent retailers for a centre of its size, with low vacancy levels. However, its limited comparison and convenience offer means that there is a significant 'leakage' of shoppers and retail expenditure out of the area to larger competing centres and shopping facilities. This is confirmed by the findings of the household surveys, as described in more detail in Section 4 of the *Retail Planning Assessment*.

COPPERHOUSE TOWN CENTRE

1.14 Copperhouse is a linear high street and its retail offer is almost exclusively concentrated on Fore Street, along both sides of the road. Our centre audit of has identified a total of 53 outlets comprising a mix of Class A1-A5 uses and other service businesses.

Diversity of Uses

1.15 Retailing in Copperhouse is mainly dominated by smaller independent businesses, meeting the day-to-day top up and service needs of local residents, as well as visitors and tourists. The centre comprises a mix of national multiple retailers (such as, for example, Co-op, Premier, Alliance & Leicester, Alliance Pharmacy and William Hill), as well as a number of independent shops and service businesses. The table below shows that Copperhouse has a good mix and choice of basic retail facilities.

Table 1.2: Copperhouse Town Centre – Diversity of Uses

Uses	Representation
Convenience Store	Co-op / Premier
Baker	Warrens / Hampsons
Butcher	Hampsons
Chemist	Alliance
Greengrocer	Available in Co-op
Off-licence	Available in Co-op / Premier
CTN	Todays
Post Office	Post Office
Banking Facilities	Alliance and Leicester

Source: Strategic Perspectives

1.16 The medium-sized Co-op store is situated at the eastern end of the town centre. The survey results show that it mainly meets the more frequent top-up shopping needs of the local Hayle population, with a more limited main food shopping role.

1.17 In addition to its retail function, the town centre also has a diverse range of other activities including a good range of public houses, restaurants, cafes and take-aways; library; dental surgery; veterinary clinic; community hall; dwellings; anda place of worship. All these uses help to draw people into the centre on a regular basis. This, in turn, creates additional footfall from which traders can benefit.

Vacancies

1.18 There were only four vacant retail properties in Copperhouse at the time of our latest audit of the centre. This is equivalent to a vacancy level of 7.5%, which is significantly below the national average of over 12%. As for Foundry this is a positive indication of the overall vitality and viability of the centre.

Pedestrian Flows

1.19 Our fieldwork indicated that the pedestrian flows are relatively buoyant across the centre.

Accessibility

1.20 The centre is easily accessible by local bus services. It also benefits from the dedicated surface-level car park serving the Co-op. Both pedestrian and cycling access into the centre is good.

Environmental Quality

1.21 As for Foundry town centre, the Copperhouse's historic nature and attractiveness is recognised by its designation as part of Hayle's Conservation Area. The centre also benefits from a good provision of street furniture, landscaping, trees, litter bins and lighting. It is clean and well-maintained, and there are no obvious signs of graffiti or negative crime perception.

Summary

1.22 In summary, Copperhouse primarily serves the day-to-day shopping and service needs of its local resident population. It was busy and vibrant at the time of our visits, and appears to be trading well. The retailer composition, limited vacancies and the buoyant footfall indicates a vital and viable centre. The Co-op helps to 'anchor' the centre's overall retail offer and was trading well at the time of our various visits.

Appendix A: Foundry Town Centre – Centre Audit

Operator	Category
Strawberry Blondes	Hairdressers
The Auto Shock	Car Accessories
Philip's	Bakery
The Royal Standard Inn	Public House
The Male Company	Hairdressers
Hayle Youth Project	Office
Vacant (x3)	
Johnny's	Cafe
Hubbards Fish & Chips	Take Away
Carnsew Gallery	Gallery
Hayle Home Furnishings	Furniture
Hayle Cycles	Bike Shop
Rainbow Little Cat Rescue	Charity Shop
Inspirations	Clothes and Accessories
The Farm Shop	Greengrocers
Biggleston	DIY
Hayle Gallery	Gallery
Fresh	Cafe
Mr Bs	Ice Cream Parlour
Blewetts	Toy Shop
Flower Time / Pet Time	Florists / Pet Shop
Diing Tay	Chinese Restaurant & Take Away
Curry Leaf	Indian and Thai Restaurant & Take Away
Martin's (incorporates Post Office)	CTN & Post Office
Boots	Chemists
Spar	Conveninece Store
Warrens	Bakery
Heyl's Kitchen	Cafe
Colin's Market Garden	Greengrocers
Sue's Fabric & Wool Shop	Haberdashery
Cornish Gems	Estate Agents
Hampsons of Hayle	Butchers
Lloyds TSB	Bank
The White Hart	Hotel
Foundry Bar & Restaurant	Public House & Restaurant
Philip's Famous Pasties	Bakery
David Berwick	Estate Agent
Cornwall Chiropractic Clinic	Clinic
Barclays	Bank
Harvey's Foundry Trust	Office
Salt	Restaurant
Pratt's Shopping Arcade (lower and upper levels) incorporating: Bait & Tackle; Furniture Shop; Hayle Pump; DVDs & Videos; Charity Shop; Books, Curios & Collectables; Tattoo's; Hairdressers; Beautician; Hayle Model Railway; Foundry Gallery Complex.	
Foundry House (arcade of small kiosks) incorporating: West Cornwall Community Wheels; K&S Launderette; Disability Information & Advice Line; DVD Rental	

Appendix B: Copperhouse Town Centre – Centre Audit

Operator	Category
Dan's Plaice	Fish & Chips Take Away
Divas	Clothing
Down The Line	Clothing
T.J's Barber Shop	Hairdressers
Sea Pearl Garden	Chinese Take Away
The Copperhouse Clinic	Health & Beauty
Aspire	Estate Agents
Cafe 7	Cafe
Dune Boutique	Clothing
Warrens Simply Cornish	Bakery
Contemporary Jewellery	Beauty Accessories
Hayle Kebab House	Take Away
Copperhouse	Public House
Premier	Convenience Store
Craft N Things	Arts and Crafts
Bradleys	Estate Agents
Newell's Travel	Travel Agents
Alliance and Leicester	Building Society
Copperhouse Dental Surgery	Dental Surgery
Hampsons	Bakery / Butchers
The Cornubia Inn	Public House
Greenwood Insurance Services	Financial Services / Estate Agents
Marshall's	Estate Agents
Post Office	Post Office
Blushhh	Lingerie
Fahrenheit Fast Tan Centre	Solarium
Balti King	Indian Restaurant & Take Away
Vacant (x 4)	
Studio 59	Hairdressers
Copperhouse Jewellers	Jewellers / Beauty Accessories
Cinnamon Tree	Indian Take Away
W J Winn	Funeral Directors
The Mad Hatter	Bed & Breakfast / Cafe
Living Canvas	Tattoo
The Jolly Bodger	DIY
CVC Solicitors	Solicitors
Miller & Son	Estate Agents
New Image	Hairdressers
Alliance	Pharmacy
The Thai Chef	Restaurant & Take Away
Angove Sports	Sports Shop
The Wharf	Clothing
HQ	Hair & Beauty
Penwith Housing Association	Offices
William Hill	Bookmakers
Todays	CTN
Matthews & Company	Estate Agents
Animal Vet Services	Veterinary
Cornwall Hospice	Charity Shop
Church Hall	
The Cinnamon Trust	Offices
The Co-op	Supermarket

APPENDIX 3: 'MARKET SHARE ANALYSIS' – CONVENIENCE GOODS

ING REAL ESTATE DEVELOPMENT

SOUTH QUAY HAYLE: FOODSTORE PROPOSAL

Convenience Goods Assessment - 'Market Share Analysis'

Table 1: Market Share Analysis (%)

Store	Zone 1				Zone 2				Zone 3				Zone 4			
	PRS		WYG		PRS		WYG		PRS		WYG		PRS		WYG	
	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up
Hayle																
Co-op, Copper Terrace	0.0%	0.0%	0.0%	1.9%	12.5%	20.5%	0.5%	3.3%	23.5%	27.3%	16.8%	45.2%	1.7%	2.9%	0.0%	0.0%
Lidl	0.0%	1.1%	0.0%	0.0%	5.4%	6.8%	1.6%	2.6%	4.4%	9.1%	10.3%	14.5%	0.0%	0.0%	1.1%	0.0%
M&S, West Cornwall RP	0.0%	0.0%	1.5%	1.9%	0.0%	0.0%	1.6%	2.6%	0.0%	0.0%	0.5%	4.0%	0.0%	0.0%	0.0%	5.2%
Other stores	0.0%	0.0%	0.0%	0.0%	0.0%	11.4%	0.0%	0.0%	0.0%	20.5%	1.1%	14.5%	0.0%	0.0%	0.0%	0.0%
Sub-Total	**0.0%**	**1.1%**	**1.5%**	**3.8%**	**17.9%**	**38.6%**	**3.8%**	**8.6%**	**27.9%**	**56.8%**	**28.8%**	**78.2%**	**1.7%**	**2.9%**	**1.1%**	**5.2%**
St Ives / Carbis Bay																
Co-op, Royal Square	0.0%	0.0%	0.0%	0.0%	3.6%	6.8%	1.1%	6.6%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
Co-op, The Stennack	0.0%	0.0%	0.0%	0.0%	1.8%	11.4%	2.7%	23.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Carbis Bay	0.0%	0.0%	0.0%	0.0%	30.4%	11.4%	62.4%	29.8%	0.0%	4.5%	3.3%	2.4%	0.0%	0.0%	0.0%	0.0%
Co-op, Tregenna Place, St Ives	0.0%	0.0%	0.0%	0.0%	0.0%	4.5%	1.1%	8.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other stores, Carbis Bay	0.0%	0.0%	0.0%	0.0%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other stores, St Ives	0.0%	0.0%	0.0%	0.0%	0.0%	9.1%	0.5%	13.2%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%
Sub-Total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**35.7%**	**47.7%**	**67.7%**	**82.1%**	**0.0%**	**4.5%**	**3.3%**	**4.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Penzance / Newlyn																
Co-op	9.7%	20.2%	1.5%	22.6%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%
Co-op, Wherrytown	3.2%	4.5%	3.1%	5.7%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland	1.6%	7.9%	0.0%	1.9%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%
Lidl	3.2%	2.2%	1.5%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%	1.1%	0.0%
Morrisons	33.1%	13.5%	38.5%	9.4%	5.4%	0.0%	11.8%	2.0%	11.8%	4.5%	19.0%	4.8%	18.6%	8.6%	42.0%	12.1%
Co-op, The Strand, Newlyn	4.0%	10.1%	0.0%	11.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco	40.3%	15.7%	50.8%	15.1%	5.4%	0.0%	4.3%	1.3%	11.8%	2.3%	14.1%	2.4%	20.3%	17.1%	15.9%	6.9%
Other stores, Newlyn	0.0%	1.1%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.0%
Other stores, Penzance	4.8%	16.9%	0.0%	17.0%	0.0%	2.3%	0.0%	0.0%	1.5%	0.0%	0.0%	0.8%	1.7%	8.6%	0.0%	15.5%
Sub-Total	**####**	**92.1%**	**95.4%**	**88.7%**	**10.7%**	**2.3%**	**16.1%**	**5.3%**	**25.0%**	**6.8%**	**33.2%**	**8.1%**	**44.1%**	**40.0%**	**59.1%**	**36.2%**
Other Stores Outside District:																
Tesco Extra, Pool	0.0%	0.0%	0.0%	0.0%	8.9%	2.3%	1.6%	0.0%	10.3%	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Camborne	0.0%	0.0%	0.0%	0.0%	16.1%	4.5%	4.3%	1.3%	29.4%	9.1%	25.0%	3.2%	1.7%	0.0%	1.1%	0.0%
Tesco, Helston	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	1.1%	1.6%	33.9%	14.3%	33.0%	13.8%
Morrisons, Pool	0.0%	0.0%	0.0%	0.0%	3.6%	0.0%	1.6%	0.0%	0.0%	2.3%	3.8%	1.6%	0.0%	0.0%	0.0%	0.0%
Somerfield, Helston	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	8.5%	2.9%	2.3%	3.4%
All Other Locations	**0.0%**	**6.7%**	**3.1%**	**7.5%**	**7.1%**	**4.5%**	**4.8%**	**2.0%**	**4.4%**	**20.5%**	**2.2%**	**3.2%**	**10.2%**	**40.0%**	**3.4%**	**41.4%**
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Store	Zone 5				Zone 6				Zone 7				Zone 8			
	PRS		WYG		PRS		WYG		PRS		WYG		PRS		WYG	
	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up
Hayle																
Co-op, Copper Terrace	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%
M&S, West Cornwall RP	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other stores	0.9%	1.4%	0.5%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	**0.9%**	**1.4%**	**1.1%**	**1.8%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.1%**	**0.0%**
St Ives / Carbis Bay																
Co-op, Royal Square	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, The Stennack	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Carbis Bay	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Tregenna Place, St Ives	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other stores, Carbis Bay	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%
Other stores, St Ives	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Penzance / Newlyn																
Co-op	0.0%	0.0%	0.0%	0.0%	4.8%	3.8%	7.3%	7.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Wherrytown	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	2.4%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl	0.0%	0.0%	0.0%	0.0%	4.8%	3.8%	4.9%	5.3%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Morrisons	0.0%	0.0%	0.5%	0.0%	33.3%	11.5%	31.7%	5.3%	0.0%	3.2%	4.4%	2.2%	0.0%	0.0%	0.0%	0.0%
Co-op, The Strand, Newlyn	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco	0.0%	0.0%	0.0%	0.0%	40.5%	11.5%	46.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other stores, Newlyn	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other stores, Penzance	0.0%	0.0%	0.0%	0.0%	0.0%	7.7%	0.0%	7.9%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	**0.0%**	**0.0%**	**0.5%**	**0.0%**	**88.1%**	**38.5%**	**92.7%**	**42.1%**	**0.0%**	**6.3%**	**4.4%**	**2.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Other Stores Outside District:																
Tesco Extra, Pool	18.9%	9.9%	11.5%	5.3%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	60.5%	20.8%	9.6%	6.5%
Tesco, Camborne	63.1%	38.0%	61.7%	36.8%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	2.0%	1.2%	2.1%	0.0%
Tesco, Helston	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	76.2%	42.9%	77.9%	17.8%	1.0%	0.0%	0.0%	0.0%
Morrisons, Pool	9.9%	5.6%	13.1%	5.3%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	10.5%	3.6%	11.7%	11.3%
Somerfield, Helston	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.3%	22.2%	4.4%	6.7%	0.0%	0.0%	0.0%	0.0%
All Other Locations	**7.2%**	**45.1%**	**12.0%**	**50.9%**	**11.9%**	**61.5%**	**7.3%**	**57.9%**	**7.6%**	**27.0%**	**13.2%**	**71.1%**	**26.0%**	**74.4%**	**74.5%**	**82.3%**
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Source (1) *Penwith District Retail Study* (2007). Please note that market shares for 'main' and 'top-up' convenience shopping have been derived from questions 1 and 6 of the Penwith Household Telephone Survey (exclude responses such as "don't do", "don't know",

(2) Household survey conducted by White Young Green as part of the Retail Assessment (November 2009) on behalf of Sainsbuy's Supermarkets Ltd and Cranford (Hayle) LLP for land at Marsh Lane, Hayle.

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Convenience Goods Assessment - 'Market Share Analysis'

Table 2: Combined Market Share Analysis (%)

Store / Centre	Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7		Zone 8	
	PRS & WYG		PRS & WYG		PRS & WYG		PRS & WYG		PRS & WYG		PRS & WYG		PRS & WYG		PRS & WYG	
	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up	Main	Top-Up
Hayle																
Co-op, Copper Terrace	0.0%	0.7%	3.3%	7.2%	18.7%	40.5%	0.7%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl	0.0%	0.7%	2.5%	3.6%	8.7%	13.1%	0.7%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%
M&S, West Cornwall RP	0.5%	0.7%	1.2%	2.1%	0.4%	3.0%	0.0%	3.2%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other stores	0.0%	0.0%	0.0%	2.6%	0.8%	16.1%	0.0%	0.0%	0.7%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	**0.5%**	**2.1%**	**7.0%**	**15.4%**	**28.6%**	**72.6%**	**1.4%**	**4.3%**	**1.0%**	**1.6%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.7%**	**0.0%**
St Ives / Carbis Bay																
Co-op, Royal Square	0.0%	0.0%	1.7%	6.7%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, The Stennack	0.0%	0.0%	2.5%	21.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Carbis Bay	0.0%	0.0%	55.0%	25.6%	2.4%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-op, Tregenna Place, St Ives	0.0%	0.0%	0.8%	7.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other stores, Carbis Bay	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.0%
Other stores, St Ives	0.0%	0.0%	0.4%	12.3%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total	**0.0%**	**0.0%**	**60.3%**	**74.4%**	**2.4%**	**4.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.9%**	**0.0%**	**0.0%**
Penzance / Newlyn																
Co-op	6.9%	21.1%	0.0%	0.5%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	6.0%	6.3%	0.0%	0.0%	0.0%	0.0%
Co-op, Wherrytown	3.2%	4.9%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	1.6%	0.0%	0.0%	0.0%	0.0%
Iceland	1.1%	5.6%	0.0%	0.5%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl	2.6%	2.8%	0.0%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	4.8%	4.7%	0.0%	0.9%	0.0%	0.0%
Morrisons	34.9%	12.0%	10.3%	1.5%	17.1%	4.8%	32.7%	10.8%	0.3%	0.0%	32.5%	7.8%	1.7%	2.8%	0.0%	0.0%
Co-op, The Strand, Newlyn	2.6%	10.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%
Tesco	43.9%	15.5%	4.5%	1.0%	13.5%	2.4%	17.7%	10.8%	0.0%	0.0%	43.4%	4.7%	0.0%	0.0%	0.0%	0.0%
Other stores, Newlyn	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	4.7%	0.0%	0.0%	0.0%	0.0%
Other stores, Penzance	3.2%	16.9%	0.0%	0.5%	0.4%	0.6%	0.7%	12.9%	0.0%	0.0%	0.0%	7.8%	0.0%	0.9%	0.0%	0.0%
Sub-Total	**98.4%**	**90.8%**	**14.9%**	**4.6%**	**31.0%**	**7.7%**	**53.1%**	**37.6%**	**0.3%**	**0.0%**	**90.4%**	**40.6%**	**1.7%**	**4.6%**	**0.0%**	**0.0%**
Other Stores Outside District:																
Tesco Extra, Pool	0.0%	0.0%	3.3%	0.5%	4.8%	0.0%	0.0%	0.0%	14.3%	7.0%	0.0%	0.0%	0.6%	0.0%	44.2%	17.0%
Tesco, Camborne	0.0%	0.0%	7.0%	2.1%	26.2%	4.8%	1.4%	0.0%	62.2%	37.3%	0.0%	0.0%	0.0%	0.9%	2.0%	0.9%
Tesco, Helston	0.0%	0.0%	0.0%	0.0%	1.6%	1.2%	33.3%	14.0%	0.0%	0.0%	0.0%	0.0%	76.9%	32.4%	0.7%	0.0%
Morrisons, Pool	0.0%	0.0%	2.1%	0.0%	2.8%	1.8%	0.0%	0.0%	11.9%	5.4%	0.0%	0.0%	1.2%	0.0%	10.9%	5.7%
Somerfield, Helston	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	4.8%	3.2%	0.0%	0.0%	0.0%	0.0%	9.8%	15.7%	0.0%	0.0%
All Other Locations	**1.1%**	**7.0%**	**5.4%**	**2.6%**	**2.8%**	**7.7%**	**6.1%**	**40.9%**	**10.2%**	**48.6%**	**9.6%**	**59.4%**	**9.8%**	**45.4%**	**41.5%**	**76.5%**
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

APPENDIX 4: 'MARKET SHARE ANALYSIS' – COMPARISON GOODS

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FOUNDRY & SOUTH QUAY - HAYLE: RETAIL PROPOSAL

Comparison Goods Impact Assessment - Market Share Analysis

TABLE A4.1: M MARKET SHARE ANALYSIS (%) - ALL COMPARISON GOODS & ALL ZONES

Cornwall Retail Study - Survey Zones:		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Penwith Retail Study - Survey Zones:		Zone 1&6	Zone 2	Zone 3&4	Zone 7	-	Zone 5	Zone 8	Zone 8	Zone 8
	CRS Zones			HAYLE						
Hayle	Zone 3	1.3%	2.8%	7.3%	0.8%	0.0%	2.2%	1.1%	0.3%	0.2%
Hayle - West Cornwall RP - Boots	Zone 3	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - M&S	Zone 3	0.1%	0.5%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Next	Zone 3	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Undefined	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Penzance	Zone 1	74.0%	34.3%	28.3%	9.2%	0.2%	1.5%	0.5%	0.3%	0.2%
Penzance: Out-of-Centre	Zone 1	12.3%	3.3%	8.3%	3.4%	0.0%	0.0%	0.3%	0.0%	0.0%
Carbis Bay	Zone 2	0.0%	0.5%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
St. Ives	Zone 2	0.1%	12.7%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Camborne	Zone 5	0.1%	7.0%	11.5%	5.3%	1.0%	33.6%	6.0%	6.6%	4.6%
Camborne: Out-of-Centre	Zone 5	0.6%	2.8%	14.3%	4.9%	0.4%	14.1%	22.5%	14.2%	3.7%
Truro	Zone 10	8.8%	24.4%	17.9%	27.1%	31.6%	22.8%	28.0%	35.0%	46.7%
Truro - Retail Warehouses	Zone 10	0.1%	0.9%	1.4%	2.2%	1.8%	0.7%	2.5%	5.6%	3.5%
SUB-TOTAL:		97.6%	89.7%	90.2%	52.9%	35.0%	74.9%	61.0%	62.0%	59.1%
All other locations		2.4%	10.3%	9.8%	47.1%	65.0%	25.1%	39.0%	38.0%	40.9%
TOTAL:		**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

NOTES: Zone 1 covers Zones 1 & 6 of the 2007 *Penwith Retail Study* (2007 PRS); Zone 3 covers Zones 3 & 4 of the 2007 PRS.

A4.1(a): Expenditure per Capita

Zone 1	Zone 2	Zone 3	Zone 6
Zone 1&6	Zone 2	Zone 3&4	Zone 5
£2,729	**£2,653**	**£2,734**	**£2,485**
£40	£87	£256	£61
£0	£0	£12	£0
£5	£13	£9	£0
£0	£13	£0	£0
£0	£0	£0	£0
£2,097	£836	£825	£39
£216	£58	£150	£0
£0	£4	£9	£0
£4	£403	£1	£0
£1	£149	£318	£910
£10	£58	£256	£240
£287	£764	£631	£693
£4	£15	£36	£16
£64	£253	£230	£525
£2,729	**£2,653**	**£2,734**	**£2,485**

A4.1(c): Weighted Market Share (%)

Zone 1	Zone 2	Zone 3	Zone 6
Zone 1&6	Zone 2	Zone 3&4	Zone 5
1.5%	3.3%	9.4%	2.5%
0.0%	0.0%	0.5%	0.0%
0.2%	0.5%	0.3%	0.0%
0.0%	0.5%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%
76.8%	31.5%	30.2%	1.5%
7.9%	2.2%	5.5%	0.0%
0.0%	0.1%	0.3%	0.0%
0.1%	15.2%	0.0%	0.0%
0.0%	5.6%	11.6%	36.6%
0.4%	2.2%	9.4%	9.6%
10.5%	28.8%	23.1%	27.9%
0.1%	0.6%	1.3%	0.7%
2.4%	9.5%	8.4%	21.1%
100%	**100%**	**100%**	**100%**

TABLE A4.2: MARKET SHARE ANALYSIS - CLOTHING & FOOTWEAR

Cornwall Retail Study - Survey Zones:		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Penwith Retail Study - Survey Zones:		Zone 1&6	Zone 2	Zone 3&4	Zone 7	-	Zone 5	Zone 8	Zone 8	Zone 8
	CRS - Zones									
Hayle	Zone 3	5.2%	7.7%	11.7%	3.9%	0.0%	7.5%	3.1%	1.7%	0.0%
Hayle - West Cornwall RP - Boots	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - M&S	Zone 3	0.9%	2.6%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Next	Zone 3	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Penzance	Zone 1	75.9%	28.2%	36.9%	3.9%	0.4%	6.0%	1.5%	1.7%	1.1%
Penzance: Out-of-Centre	Zone 1	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carbis Bay	Zone 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
St. Ives	Zone 2	0.0%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Camborne	Zone 5	0.0%	0.0%	9.0%	2.6%	0.0%	24.6%	4.6%	5.0%	1.1%
Camborne: Out-of-Centre	Zone 5	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Truro	Zone 10	17.2%	48.7%	30.6%	65.1%	37.8%	57.5%	63.1%	68.3%	77.3%
Truro - Retail Warehouses	Zone 10	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	1.7%	1.1%
SUB-TOTAL:		99.1%	94.9%	90.1%	76.3%	38.3%	95.5%	72.3%	78.3%	80.7%
All other locations		0.9%	5.1%	9.9%	23.7%	61.7%	4.5%	27.7%	21.7%	19.3%
TOTAL:		**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

A4.2(a): Expenditure per Capita

Zone 1	Zone 2	Zone 3	Zone 6
Zone 1&6	Zone 2	Zone 3&4	Zone 5
£537	**£514**	**£519**	**£502**
£28	£40	£61	£37
£0	£0	£0	£0
£5	£13	£9	£0
£0	£13	£0	£0
£0	£0	£0	£0
£408	£145	£192	£30
£0	£0	£0	£0
£0	£0	£0	£0
£0	£26	£0	£0
£0	£0	£47	£124
£0	£0	£0	£0
£93	£250	£159	£289
£0	£0	£0	£0
£5	£26	£51	£22
£537	**£514**	**£519**	**£502**

A4.2(b): Weighted Market Share (%)

Zone 1	Zone 2	Zone 3	Zone 6
Zone 1&6	Zone 2	Zone 3&4	Zone 5
5.2%	7.7%	11.7%	7.5%
0.0%	0.0%	0.0%	0.0%
0.9%	2.6%	1.8%	0.0%
0.0%	2.6%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%
75.9%	28.2%	36.9%	6.0%
0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%
0.0%	5.1%	0.0%	0.0%
0.0%	0.0%	9.0%	24.6%
0.0%	0.0%	0.0%	0.0%
17.2%	48.7%	30.6%	57.5%
0.0%	0.0%	0.0%	0.0%
0.9%	5.1%	9.9%	4.5%
100%	**100%**	**100%**	**100%**

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FOUNDRY & SOUTH QUAY - HAYLE: RETAIL PROPOSAL
Comparison Goods Impact Assessment - Market Share Analysis

TABLE A4.3: MARKET SHARE ANALYSIS - FURNITURE, ETC.

Cornwall Retail Study - Survey Zones:		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Penwith Retail Study - Survey Zones:		Zone 1&6	Zone 2	Zone 3&4	Zone 7	-	Zone 5	Zone 8	Zone 8	Zone 8
	CRS - Zones									
Hayle	Zone 3	1.2%	0.0%	1.5%	0.0%	0.0%	1.4%	2.6%	0.0%	0.0%
Hayle - West Cornwall RP - Boots	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - M&S	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Next	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Penzance	Zone 1	70.6%	17.4%	20.6%	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Penzance: Out-of-Centre	Zone 1	2.4%	0.0%	2.9%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%
Carbis Bay	Zone 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
St. Ives	Zone 2	1.2%	13.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Camborne	Zone 5	0.0%	8.7%	13.2%	4.7%	0.8%	26.8%	5.3%	15.6%	9.3%
Camborne: Out-of-Centre	Zone 5	1.2%	0.0%	8.8%	3.7%	0.0%	7.0%	13.2%	6.3%	0.0%
Truro	Zone 10	17.6%	43.5%	42.6%	30.8%	37.4%	25.4%	36.8%	34.4%	30.2%
Truro - Retail Warehouses	Zone 10	0.0%	0.0%	2.9%	0.9%	0.8%	2.8%	5.3%	6.3%	0.0%
SUB-TOTAL:		94.1%	82.6%	92.6%	44.9%	38.9%	63.4%	63.2%	62.5%	39.5%
All other locations		5.9%	17.4%	7.4%	55.1%	61.1%	36.6%	36.8%	37.5%	60.5%
TOTAL:		**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

A4.3(a): Expenditure per Capita

Zone 1	Zone 2	Zone 3	Zone 6
Zone 1&6	Zone 2	Zone 3&4	Zone 5
£337	**£337**	**£350**	**£295**
£4	£0	£5	£4
£0	£0	£0	£0
£0	£0	£0	£0
£0	£0	£0	£0
£0	£0	£0	£0
£238	£59	£72	£0
£8	£0	£10	£0
£0	£0	£0	£0
£4	£44	£0	£0
£0	£29	£46	£79
£4	£0	£31	£21
£59	£147	£149	£75
£0	£0	£10	£8
£20	£59	£26	£108
£337	**£337**	**£350**	**£295**

A4.3(b): Weighted Market Share (%)

Zone 1	Zone 2	Zone 3	Zone 6
Zone 1&6	Zone 2	Zone 3&4	Zone 5
1.2%	0.0%	1.5%	1.4%
0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%
70.6%	17.4%	20.6%	0.0%
2.4%	0.0%	2.9%	0.0%
0.0%	0.0%	0.0%	0.0%
1.2%	13.0%	0.0%	0.0%
0.0%	8.7%	13.2%	26.8%
1.2%	0.0%	8.8%	7.0%
17.6%	43.5%	42.6%	25.4%
0.0%	0.0%	2.9%	2.8%
5.9%	17.4%	7.4%	36.6%
100%	**100%**	**100%**	**100%**

TABLE A4.4: MARKET SHARE ANALYSIS - DIY, ETC. **TABLE 3a: MARKET SHARE ANALYSIS (%)**

Cornwall Retail Study - Survey Zones:		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Penwith Retail Study - Survey Zones:		Zone 1&6	Zone 2	Zone 3&4	Zone 7	-	Zone 5	Zone 8	Zone 8	Zone 8
	CRS - Zones									
Hayle	Zone 3	0.8%	0.0%	4.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Boots	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - M&S	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Next	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Undefined	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Penzance	Zone 1	62.0%	51.3%	28.3%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Penzance: Out-of-Centre	Zone 1	34.7%	10.3%	18.9%	10.3%	0.0%	0.0%	0.0%	0.0%	0.0%
Carbis Bay	Zone 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
St. Ives	Zone 2	0.0%	12.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Camborne	Zone 5	0.0%	10.3%	9.4%	6.2%	1.4%	25.0%	1.5%	6.9%	8.5%
Camborne: Out-of-Centre	Zone 5	0.0%	2.6%	27.6%	11.7%	0.0%	34.1%	52.9%	36.2%	7.3%
Truro	Zone 10	0.8%	7.7%	0.8%	4.8%	5.9%	3.0%	1.5%	8.6%	14.6%
Truro - Retail Warehouses	Zone 10	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	1.5%	5.2%	4.9%
SUB-TOTAL:		98.3%	94.9%	90.6%	53.1%	7.2%	62.1%	57.4%	56.9%	35.4%
All other locations		1.7%	5.1%	9.4%	46.9%	92.8%	37.9%	42.6%	43.1%	64.6%
TOTAL:		**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

A4.4(a): Expenditure per Capita

Zone 1	Zone 2	Zone 3	Zone 6
Zone 1&6	Zone 2	Zone 3&4	Zone 5
£328	**£308**	**£342**	**£285**
£3	£0	£16	£0
£0	£0	£0	£0
£0	£0	£0	£0
£0	£0	£0	£0
£0	£0	£0	£0
£204	£158	£97	£0
£114	£32	£65	£0
£0	£0	£0	£0
£0	£39	£0	£0
£0	£32	£32	£71
£0	£8	£94	£97
£3	£24	£3	£9
£0	£0	£3	£0
£5	£16	£32	£108
£328	**£308**	**£342**	**£285**

A4.4(b): Weighted Market Share (%)

Zone 1	Zone 2	Zone 3	Zone 6
Zone 1&6	Zone 2	Zone 3&4	Zone 5
0.8%	0.0%	4.7%	0.0%
0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%
62.0%	51.3%	28.3%	0.0%
34.7%	10.3%	18.9%	0.0%
0.0%	0.0%	0.0%	0.0%
0.0%	12.8%	0.0%	0.0%
0.0%	10.3%	9.4%	25.0%
0.0%	2.6%	27.6%	34.1%
0.8%	7.7%	0.8%	3.0%
0.0%	0.0%	0.8%	0.0%
1.7%	5.1%	9.4%	37.9%
100%	**100%**	**100%**	**100%**

TABLE A4.5: MARKET SHARE ANALYSIS - LARGE & SMALL DO TABLE 4a: MARKET SHARE ANALYSIS (%)

Cornwall Retail Study - Survey Zones:		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Penwith Retail Study - Survey Zones:		Zone 1&6	Zone 2	Zone 3&4	Zone 7	-	Zone 5	Zone 8	Zone 8	Zone 8
	CRS - Zones									
Hayle	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Boots	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - M&S	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Next	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Undefined	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Penzance	Zone 1	70.8%	39.4%	19.4%	12.5%	0.0%	0.0%	0.0%	0.0%	0.0%
Penzance: Out-of-Centre	Zone 1	21.7%	3.0%	15.3%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Carbis Bay	Zone 2	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
St. Ives	Zone 2	0.0%	3.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%
Camborne	Zone 5	0.9%	12.1%	13.3%	7.4%	2.3%	33.9%	1.6%	4.3%	1.3%
Camborne: Out-of-Centre	Zone 5	1.9%	9.1%	30.6%	8.1%	1.7%	19.3%	36.1%	30.4%	7.6%
Truro	Zone 10	2.8%	9.1%	2.0%	7.4%	34.5%	6.4%	9.8%	17.4%	35.4%
Truro - Retail Warehouses	Zone 10	0.0%	3.0%	2.0%	5.9%	4.0%	0.9%	6.6%	10.9%	11.4%
SUB-TOTAL:		98.1%	81.8%	83.7%	46.3%	42.5%	60.6%	54.1%	63.0%	57.0%
All other locations		1.9%	18.2%	16.3%	53.7%	57.5%	39.4%	45.9%	37.0%	43.0%
TOTAL:		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

A4.5(a): Expenditure per Capita

Zone 1	Zone 2	Zone 3	Zone 6
Zone 1&6	Zone 2	Zone 3&4	Zone 5
£120	**£119**	**£122**	**£108**
£0	£0	£0	£0
£0	£0	£0	£0
£0	£0	£0	£0
£0	£0	£0	£0
£0	£0	£0	£0
£85	£47	£24	£0
£26	£4	£19	£0
£0	£4	£0	£0
£0	£4	£1	£0
£1	£14	£16	£37
£2	£11	£37	£21
£3	£11	£2	£7
£0	£4	£2	£1
£2	£22	£20	£43
£120	**£119**	**£122**	**£108**

A4.5(b): Weighted Market Share (%)

Zone 1	Zone 2	Zone 3	Zone 6
Zone 1&6	Zone 2	Zone 3&4	Zone 5
0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%
0.0%	0.0%	0.0%	0.0%
70.8%	39.4%	19.4%	0.0%
21.7%	3.0%	15.3%	0.0%
0.0%	3.0%	0.0%	0.0%
0.0%	3.0%	1.0%	0.0%
0.9%	12.1%	13.3%	33.9%
1.9%	9.1%	30.6%	19.3%
2.8%	9.1%	2.0%	6.4%
0.0%	3.0%	2.0%	0.9%
1.9%	18.2%	16.3%	39.4%
100%	**100%**	**100%**	**100%**

ING REAL ESTATE DEVELOPMENT
FOUNDRY & SOUTH QUAY - HAYLE: RETAIL PROPOSAL

Comparison Goods Impact Assessment - Market Share Analysis

TABLE A4.6: MARKET SHARE ANALYSIS - AUDIO-VISUAL GOODS (TV, Radios, Hi-Fi, etc.)

Cornwall Retail Study - Survey Zones:		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Penwith Retail Study - Survey Zones:		Zone 1&6	Zone 2	Zone 3&4	Zone 7	-	Zone 5	Zone 8	Zone 8	Zone 8
	CRS - Zones									
Hayle	Zone 3	0.0%	3.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Boots	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - M&S	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Next	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Undefined	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Penzance	Zone 1	73.2%	33.3%	23.0%	9.2%	0.0%	1.0%	0.0%	0.0%	0.0%
Penzance: Out-of-Centre	Zone 1	15.5%	6.1%	11.5%	3.8%	0.0%	0.0%	1.8%	0.0%	0.0%
Carbis Bay	Zone 2	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
St. Ives	Zone 2	0.0%	9.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Camborne	Zone 5	0.0%	12.1%	14.9%	6.9%	2.6%	34.6%	5.5%	7.3%	8.1%
Camborne: Out-of-Centre	Zone 5	1.0%	3.0%	23.0%	6.9%	1.3%	22.1%	32.7%	14.6%	8.1%
Truro	Zone 10	6.2%	15.2%	8.0%	11.5%	53.2%	9.6%	14.5%	24.4%	37.1%
Truro - Retail Warehouses	Zone 10	1.0%	3.0%	3.4%	6.2%	8.4%	1.9%	3.6%	14.6%	3.2%
SUB-TOTAL:		96.9%	84.8%	87.4%	44.6%	65.6%	69.2%	58.2%	61.0%	56.5%
All other locations		3.1%	15.2%	12.6%	55.4%	34.4%	30.8%	41.8%	39.0%	43.5%
TOTAL:		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

A4.6(a): Expenditure per Capita

	Zone 1	Zone 2	Zone 3	Zone 6
Penwith Retail Study - Survey Zones:	Zone 1&6	Zone 2	Zone 3&4	Zone 5
	£386	**£377**	**£374**	**£373**
Hayle	£0	£11	£4	£0
Hayle - West Cornwall RP - Boots	£0	£0	£0	£0
Hayle - West Cornwall RP - M&S	£0	£0	£0	£0
Hayle - West Cornwall RP - Next	£0	£0	£0	£0
Hayle - West Cornwall RP - Undefined	£0	£0	£0	£0
Penzance	£283	£126	£86	£4
Penzance: Out-of-Centre	£60	£23	£43	£0
Carbis Bay	£0	£0	£9	£0
St. Ives	£0	£34	£0	£0
Camborne	£0	£46	£56	£129
Camborne: Out-of-Centre	£4	£11	£86	£82
Truro	£24	£57	£30	£36
Truro - Retail Warehouses	£4	£11	£13	£7
SUB-TOTAL:				
All other locations	£12	£57	£47	£115
TOTAL:	**£386**	**£377**	**£374**	**£373**

A4.6(b): Weighted Market Share (%)

	Zone 1	Zone 2	Zone 3	Zone 6
Penwith Retail Study - Survey Zones:	Zone 1&6	Zone 2	Zone 3&4	Zone 5
Hayle	0.0%	3.0%	1.1%	0.0%
Hayle - West Cornwall RP - Boots	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - M&S	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Next	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Undefined	0.0%	0.0%	0.0%	0.0%
Penzance	73.2%	33.3%	23.0%	1.0%
Penzance: Out-of-Centre	15.5%	6.1%	11.5%	0.0%
Carbis Bay	0.0%	0.0%	2.3%	0.0%
St. Ives	0.0%	9.1%	0.0%	0.0%
Camborne	0.0%	12.1%	14.9%	34.6%
Camborne: Out-of-Centre	1.0%	3.0%	23.0%	22.1%
Truro	6.2%	15.2%	8.0%	9.6%
Truro - Retail Warehouses	1.0%	3.0%	3.4%	1.9%
SUB-TOTAL:				
All other locations	3.1%	15.2%	12.6%	30.8%
TOTAL:	**100%**	**100%**	**100%**	**100%**

TABLE A4.7: MARKET SHARE ANALYSIS - PERSONAL & LUXURY GOODS

Cornwall Retail Study - Survey Zones:		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Penwith Retail Study - Survey Zones:		Zone 1&6	Zone 2	Zone 3&4	Zone 7	-	Zone 5	Zone 8	Zone 8	Zone 8
	CRS - Zones									
Hayle	Zone 3	1.1%	6.9%	23.3%	0.9%	0.0%	4.0%	1.9%	0.0%	1.5%
Hayle - West Cornwall RP - Boots	Zone 3	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - M&S	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Next	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Undefined	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Penzance	Zone 1	90.3%	31.0%	33.7%	4.4%	0.0%	1.0%	0.0%	0.0%	0.0%
Penzance: Out-of-Centre	Zone 1	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carbis Bay	Zone 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
St. Ives	Zone 2	0.0%	37.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Camborne	Zone 5	0.0%	0.0%	7.0%	2.6%	0.0%	57.6%	11.5%	2.4%	4.4%
Camborne: Out-of-Centre	Zone 5	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%
Truro	Zone 10	6.5%	20.7%	26.7%	37.7%	27.2%	29.3%	46.2%	45.2%	63.2%
Truro - Retail Warehouses	Zone 10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
SUB-TOTAL:		97.8%	96.6%	94.2%	45.6%	27.2%	92.9%	59.6%	47.6%	69.1%
All other locations		2.2%	3.4%	5.8%	54.4%	72.8%	7.1%	40.4%	52.4%	30.9%
TOTAL:		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

A4.7(a): Expenditure per Capita

	Zone 1	Zone 2	Zone 3	Zone 6
Penwith Retail Study - Survey Zones:	Zone 1&6	Zone 2	Zone 3&4	Zone 5
	£539	£528	£534	£490
Hayle	£6	£36	£124	£20
Hayle - West Cornwall RP - Boots	£0	£0	£12	£0
Hayle - West Cornwall RP - M&S	£0	£0	£0	£0
Hayle - West Cornwall RP - Next	£0	£0	£0	£0
Hayle - West Cornwall RP - Undefined	£0	£0	£0	£0
Penzance	£487	£164	£180	£5
Penzance: Out-of-Centre	£0	£0	£6	£0
Carbis Bay	£0	£0	£0	£0
St. Ives	£0	£200	£0	£0
Camborne	£0	£0	£37	£282
Camborne: Out-of-Centre	£0	£0	£0	£5
Truro	£35	£109	£143	£143
Truro - Retail Warehouses	£0	£0	£0	£0
SUB-TOTAL:				
All other locations	£12	£18	£31	£35
TOTAL:	**£539**	**£528**	**£534**	**£490**

A4.7(b): Weighted Market Share (%)

	Zone 1	Zone 2	Zone 3	Zone 6
Penwith Retail Study - Survey Zones:	Zone 1&6	Zone 2	Zone 3&4	Zone 5
Hayle	1.1%	6.9%	23.3%	4.0%
Hayle - West Cornwall RP - Boots	0.0%	0.0%	2.3%	0.0%
Hayle - West Cornwall RP - M&S	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Next	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Undefined	0.0%	0.0%	0.0%	0.0%
Penzance	90.3%	31.0%	33.7%	1.0%
Penzance: Out-of-Centre	0.0%	0.0%	1.2%	0.0%
Carbis Bay	0.0%	0.0%	0.0%	0.0%
St. Ives	0.0%	37.9%	0.0%	0.0%
Camborne	0.0%	0.0%	7.0%	57.6%
Camborne: Out-of-Centre	0.0%	0.0%	0.0%	1.0%
Truro	6.5%	20.7%	26.7%	29.3%
Truro - Retail Warehouses	0.0%	0.0%	0.0%	0.0%
SUB-TOTAL:				
All other locations	2.2%	3.4%	5.8%	7.1%
TOTAL:	**100%**	**100%**	**100%**	**100%**

TABLE A4.8: MARKET SHARE ANALYSIS - RECREATIONAL GOODS

Cornwall Retail Study - Survey Zones:		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Penwith Retail Study - Survey Zones:		Zone 1&6	Zone 2	Zone 3&4	Zone 7	-	Zone 5	Zone 8	Zone 8	Zone 8
	CRS - Zones									
Hayle	Zone 3	0.0%	0.0%	9.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Boots	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - M&S	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Next	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Undefined	Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Penzance	Zone 1	81.8%	29.4%	35.4%	8.0%	1.0%	0.0%	4.0%	0.0%	0.0%
Penzance: Out-of-Centre	Zone 1	1.8%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Carbis Bay	Zone 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
St. Ives	Zone 2	0.0%	11.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Camborne	Zone 5	0.0%	5.9%	16.9%	8.0%	0.0%	43.8%	24.0%	8.3%	0.0%
Camborne: Out-of-Centre	Zone 5	0.0%	5.9%	1.5%	0.0%	0.0%	3.1%	4.0%	0.0%	0.0%
Truro	Zone 10	14.5%	35.3%	29.2%	38.0%	36.4%	31.3%	32.0%	50.0%	73.7%
Truro - Retail Warehouses	Zone 10	0.0%	0.0%	1.5%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%
SUB-TOTAL:		98.2%	88.2%	95.4%	54.0%	38.4%	78.1%	64.0%	58.3%	73.7%
All other locations		1.8%	11.8%	4.6%	46.0%	61.6%	21.9%	36.0%	41.7%	26.3%
TOTAL:		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

A4.8(a): Expenditure per Capita

	Zone 1	Zone 2	Zone 3	Zone 6
Penwith Retail Study - Survey Zones:	Zone 1&6	Zone 2	Zone 3&4	Zone 5
	£480	£470	£493	£432
Hayle	£0	£0	£45	£0
Hayle - West Cornwall RP - Boots	£0	£0	£0	£0
Hayle - West Cornwall RP - M&S	£0	£0	£0	£0
Hayle - West Cornwall RP - Next	£0	£0	£0	£0
Hayle - West Cornwall RP - Undefined	£0	£0	£0	£0
Penzance	£393	£138	£174	£0
Penzance: Out-of-Centre	£9	£0	£8	£0
Carbis Bay	£0	£0	£0	£0
St. Ives	£0	£55	£0	£0
Camborne	£0	£28	£83	£189
Camborne: Out-of-Centre	£0	£28	£8	£13
Truro	£70	£166	£144	£135
Truro - Retail Warehouses	£0	£0	£8	£0
SUB-TOTAL:				
All other locations	£9	£55	£23	£94
TOTAL:	**£480**	**£470**	**£493**	**£432**

A4.8(b): Weighted Market Share (%)

	Zone 1	Zone 2	Zone 3	Zone 6
Penwith Retail Study - Survey Zones:	Zone 1&6	Zone 2	Zone 3&4	Zone 5
Hayle	0.0%	0.0%	9.2%	0.0%
Hayle - West Cornwall RP - Boots	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - M&S	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Next	0.0%	0.0%	0.0%	0.0%
Hayle - West Cornwall RP - Undefined	0.0%	0.0%	0.0%	0.0%
Penzance	81.8%	29.4%	35.4%	0.0%
Penzance: Out-of-Centre	1.8%	0.0%	1.5%	0.0%
Carbis Bay	0.0%	0.0%	0.0%	0.0%
St. Ives	0.0%	11.8%	0.0%	0.0%
Camborne	0.0%	5.9%	16.9%	43.8%
Camborne: Out-of-Centre	0.0%	5.9%	1.5%	3.1%
Truro	14.5%	35.3%	29.2%	31.3%
Truro - Retail Warehouses	0.0%	0.0%	1.5%	0.0%
SUB-TOTAL:				
All other locations	1.8%	11.8%	4.6%	21.9%
TOTAL:	**100%**	**100%**	**100%**	**100%**

APPENDIX 5: SEQUENTIAL ASSESSMENT

Site 1: Proposal TV-D & Site H1 (Jewson, South Quay)

Location:	Accessed from Carnsew Road to the south of the site. Surrounded to the north, south and east by Hayle Harbour.
PPS4 Location:	Edge-of-Centre
Existing Uses:	Freestanding Jewson DIY store, builder's yard and associated car park.

Figure 1:

Figure 2:

Site Location Plan:

Figure 3:

Figure 4:

Development Plan Documents & Material Planning Policies:

Adopted Penwith District Local Plan (February 2004) Proposal TV-D

Hayle Area Action Plan Issues and Options (January 2008) Part of Site H1

Site 1: Proposal TV-D & Site H1 (Jewson, South Quay)

POLICY DIRECTION

Proposal TV-D (Adopted Penwith District Local Plan)

"South Quay / Foundry Yard (6.0 HA), North Quay (7.9 HA) and East Quay (1.0 HA) are proposed for redevelopment for uses within Classes A1, A2, A3, B1, B2, B8, C1, C3, D1 and D2 of the Town and Country Planning (Use Classes) Order 1987 (as amended). Proposals for development will be required to:

- *make provision for improved port facilities;*
- *make provision for the maintenance of the existing level of industrial and storage facilities;*
- *ensure that town centre uses (A1, A2 and A3) are closely integrated with the adjacent town centre in terms of location, orientation and pedestrian movement;*
- *provide for at least 400 dwellings with a target of for 25% of provision being 'affordable' and meeting the requirements of Policy H-14;*
- *be of a scale and design that respects the maritime environment and heritage of these prominent locations in the harbour;*
- *retain existing buildings and traditional features which contribute to the character of the area;*
- *be compatible with their surroundings; and*
- *include provision for the improvement of the junction between Carnsew Road and Foundry Lane."*

Part of Site H1 (Hayle Area Action Plan Issues and Options)

"This site is in separate ownership to the wider Hayle Harbour regeneration area and is not part of the current masterplan for that area. It does however form part of the wider allocated area (Proposal TV-D) in the adopted Penwith Local Plan for mixed use development including retail. The site is not the closest part of the harbour area to the existing defined shopping area at Foundry and on this basis may not be a preferred location for retail uses within the wider harbour redevelopment. The Retail Study advises that the redevelopment characteristics of the site should reflect the wider harbour regeneration proposals to ensure a comprehensive solution to this very important part of Hayle. Therefore, the Study recommends that the potential for retail uses on this site should take into account (and not impact upon) the wider regeneration proposals, thus demonstrating a need and compliance with the sequential approach to site selection."

APPRAISAL

The Jewson site forms part of adopted Local Plan **Proposal TV-D** comprising South Quay/Foundry Yard, North Quay and East Quay areas of Hayle Harbour. Proposals for redevelopment will have to *"ensure that town centre uses (A1, A2 and A3) are closely integrated with the adjacent town centre in terms of location, orientation and pedestrian movement."* This point is reinforced in the supporting text which states that in the case of the Foundry town centre, retail uses within any proposed scheme on the allocation site should be well-integrated both physically and visually with the centre (paragraph 7.3.115) and that *"in considering specific proposals for Hayle Harbour the Council will seek the effective integration of retail and other town centre uses with the existing Foundry Centre"* (paragraph 7.3.118: bullet point 6).

The Penwith Retail Study (2007) advises that the Jewson site is not the closest part of the harbour area to the defined Foundry town centre and, on this basis, may not be a preferred location for retail within the wider harbour development. The study concludes that "*…the redevelopment characteristics of this site should reflect the wider harbour regeneration proposals being promoted by ING (the owners of the harbour) to ensure a comprehensive solution to this very important part of Hayle. Therefore, the potential for retail uses on this site should take into account (and not impact upon) the wider regeneration proposals, thus demonstrating a need and compliance with the sequential approach to site selection".*

Site 1: Proposal TV-D & Site H1 (Jewson, South Quay)

The Hayle Area Action Plan Issues and Options document also advises that: *"The site is not the closest part of the harbour area to the existing defined shopping area at Foundry and on this basis may not be a preferred location for retail uses within the wider harbour redevelopment."*

Against this policy background, and in the context of the whole site's allocation, ING's application site is clearly sequentially preferable to the Jewson site as South Quay is the closest part of the harbour to the shopping area at Foundry. The Jewson site is currently occupied and appears to be trading well; provision will therefore need to be made for the relocation of the existing operator. The site is also not currently available for redevelopment as it extends over land owned by ING.

CONCLUSION

The site is not sequentially preferable to the ING application site in terms of location and its potential linkages with the town centre. It is also not available for development, as other land ownerships are required to deliver a retail scheme on the Jewson site.

Site 2: Site H9 (Former Daniel's Store)

Location:	Fore Street, Copperhouse town centre.
PPS4 Location:	Town Centre.
Existing Uses:	Vacant retail premises.

Figure 1:

Figure 2:

Site Location Plan:

Figure 3:

Figure 4:

Development Plan Document:

Hayle Area Action Plan Issues and Options (January 2008)

Material Planning Policies:

Site H9

Site 2: Site H9 (Former Daniel's Store)

POLICY DIRECTION

Site H9

"This vacant supermarket site is located within the Copperhouse centre and has potential to help improve the Market Square area. Accessibility is very good, given the close relationship to the main route through Hayle. Opportunities exist to provide linkages between the centre and the waterfront (including, potentially, via the proposed Waterside Walkway). The Retail Study recommends that any redevelopment scheme should include retail uses on the ground floor in order to maintain and enhance the health of the Copperhouse Centre, but acknowledges that there is an opportunity for residential and other commercial uses on the upper floors."

APPRAISAL

The vacant supermarket is located within Copperhouse town centre and in the Conservation Area. The *Penwith Retail Study* recommends that any redevelopment scheme should include retail uses on the ground floor with residential and other commercial uses on the upper floors. The retail unit is too small to accommodate the proposed foodstore operation, even assuming flexibility. With regard to non-food the unit does not meet the needs of modern large format 'bulky' retailers for display floorspace, customer circulation, storage and safety. There is restricted ability for on-site car parking and limited space for servicing, which would be a minimum requirement for a large format food or non-food retailer. The site is also under new ownership and is not available.

CONCLUSION

The site is not large enough to accommodate the critical mass, type and quality of retail floorspace needed in Hayle to help achieve a "step change" in the centre's retail offer. It is also not a suitable or viable option.

Site 3: Site H8 (Atlantic Motors)

Location:	Prominent waterside location on Fore Street, to the west of Copperhouse town centre.
PPS4 Location:	Edge-of-Centre
Existing Uses:	Car showroom and forecourt

Figure 1:

Figure 2:

Site Location Plan:

Figure 3:

Figure 4:

Development Plan Document:

Hayle Area Action Plan Issues and Options (January 2008)

Material Planning Policies:

Site H8

Site 3: Site H8 (Atlantic Motors)

POLICY DIRECTION

Site H8

"This prominent site, which is currently occupied by a car sales use, is located outside but in close proximity to the western edge of the defined Copperhouse centre. Accessibility is very good, given the close relationship to the main route through Hayle. The site also beneficially adjoins the existing public car park at Commercial Road. Being currently outside the Copperhouse centre, retail uses will need to demonstrate that they cannot be located within the centre. The Retail Study advises, however, that there is potential to extend the Copperhouse centre to include the site, which it is considered is likely to be attractive to a range of uses thereby resulting in a positive impact on the Copperhouse centre. However, to achieve this it is recommended that pedestrian links between the site and the centre are improved to ensure that it is not isolated. Accessibility could be further enhanced through provision of the proposed Waterside Walkway alongside Copperhouse Pool which would beneficially link it to the centre at Copperhouse but also Foundry."

APPRAISAL

Based on recent discussions with the owner we understand that he has no intention to close or relocate the business over the foreseeable future. The site is not therefore currently available for redevelopment over the short to medium term. In any case the site would be too small to accommodate the proposed foodstore development and/or a non-food retail unit. It is irregular in shape and narrows towards its eastern end. Even adopting a reasonably flexible approach to the size and configuration of the proposed scheme, the site cannot physically accommodate retail floorspace with the necessary critical mass to achieve a "step change" in Hayle's main 'bulk' food offer. The site has good accessibility to Fore Street, but the potential to provide a freestanding non-food retail unit would be limited by issues relating to servicing and car parking arrangements.

CONCLUSION

The site is not available for redevelopment and does not represent a suitable or viable development opportunity for larger format retail floorspace development.

Site 4: Proposal H-G & Site H4 (R&J Supplies)

Location:	Located on Copper Terrace to the east of the defined Copperhouse town centre.
PPS4 Location:	Edge-of-Centre
Existing Uses:	Former industrial premises, part of which is currently used for retail.

Figure 1:

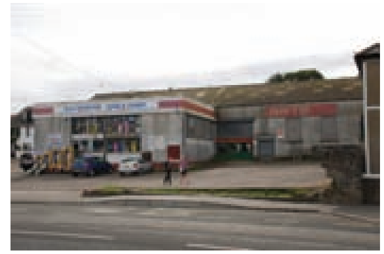

Figure 2:

Site Location Plan:

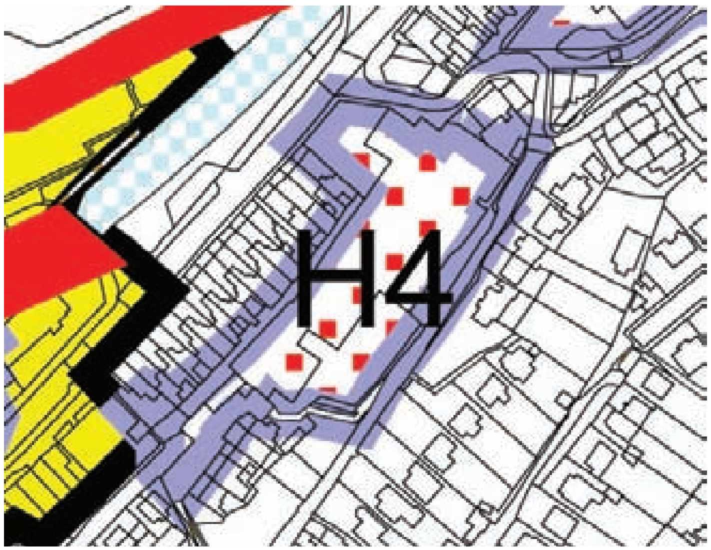

Figure 3:

Figure 4:

Development Plan Document:

Adopted Penwith District Local Plan (February 2004)
Proposal H-G

Hayle Area Action Plan Issues and Options (January 2008)
Site H4

Site 4: Proposal H-G & Site H4 (R&J Supplies)

POLICY DIRECTION

PROPOSAL H-G (Adopted Penwith District Local Plan)

"An area behind Copper Terrace, Hayle (0.70 hectares) is proposed for redevelopment for housing. At least 30% of the dwellings to be provided will be sought, through negotiation, to be affordable, meeting the requirements of Policy H-14."

Site H4 (Hayle Area Action Plan Issues and Options)

"This site, formerly in industrial use and presently partly in use as a shop, occupies a location close to the eastern edge of the Copperhouse centre. The Retail Study highlights that the site is unsuitable for large scale retail development, although there is an opportunity for some smaller scale retail and commercial uses, either fronting onto the main road through the centre or within easy walking distance. Although currently allocated in the Penwith Local Plan (Proposal H-G) for housing development, the Study advises that the site has potential to support the Copperhouse centre. On the negative side, the loss of the housing allocation would require the identification of alternative sites to meet the shortfall, although this could potentially be achieved through the options for growth and development identified and discussed at Sections 7.1.42 to 7.1.74. An alternative option might be mixed use of the site, including retail and housing elements. Arguably, given the finite resource, it makes sense to fully examine the potential opportunity to secure benefits for the vitality of the town centre through redevelopment of the site for commercial purposes, and if necessary to accept displacement of required housing as part of a planned growth scenario. Loss of the site to housing runs the risk of stifling the potential of the town centre and perpetuating the growth of 'out of town' facilities."

APPRAISAL

The site comprises former industrial buildings that are presently partly in use as a shop. It is allocated in adopted Local Plan for residential development and the associated written justification explains that the site can accommodate 35 dwellings. The proposed development would therefore be contrary to the Local Plan and would clearly jeopardise this policy direction. Furthermore, emerging policy and the 2007 Penwith Retail Study highlight that the site is unsuitable for large scale retail development. The site is unlikely to be attractive to large format retail operators given its poor main road frontage, relatively poor linkages with the town centre and potential servicing constraints

CONCLUSION

The site is preferred for residential development and is not available, suitable or viable for major new retail floorspace development.

Site 5: Proposal TV-E & Site H2 (Bookers Warehouse)

Location:	Foundry area of Hayle.
PPS4 Location:	Edge-of-Centre
Existing Uses:	Bookers (Cash and Carry) Warehouse and associated car park.

Figure 1:

Figure 2:

Site Location Plan:

Figure 3:

Figure 4:

Development Plan Document:

Adopted Penwith District Local Plan (February 2004) **-** Proposal TV-E

Hayle Area Action Plan Issues and Options (January 2008) - Site H2

Site 5: Proposal TV-E & Site H2 (Bookers Warehouse)

POLICY DIRECTION

Proposal TV-E (Adopted Penwith District Local Plan)

"The Foundry Area (1.45 ha) is proposed for the development of a heritage centre, craft workshops with ancillary retail outlets. Any developments should retain and utilise existing buildings and structures of historical significance".

Site H2 (Hayle Area Action Plan Issues and Options)

"This is an important site in the heart of the Foundry area of Hayle. It forms part of an allocated area (Proposal TV-E) in the adopted Penwith Local Plan for mixed use development, part of which (Harvey's Foundry) has already been developed. The Retail Study advises that small scale retail uses could be provided to complement the mixture of other uses. The site is a short walk from the defined Foundry shopping area to the east, although linkages need to be improved to ensure that retail and other commercial uses provide a positive impact on the health of the centre."

APPRAISAL

This edge-of-centre site is situated in a Conservation Area and forms part of the wider designation for a heritage centre, craft workshops and ancillary retail units under Proposal TV-E. A large scale retail development on this site would therefore contradict the development plan policy position. Furthermore, the *Penwith Retail Study* advises that small scale retail uses could be provided to complement the mixture of uses already developed as part of the Harvey's Foundry Regeneration Project.

The site is currently occupied by Bookers and is therefore not available. The redevelopment potential will require lengthy negotiations with the landowner and potentially the relocation of the existing operation. It should also be noted that the site has no frontage to Foundry town centre (see Figure 4) and does not represent a commercially attractive location for large format retailers, even assuming they could be accommodated on the site. The site is visually divorced from Foundry Square and the linkages are poor.

CONCLUSION

The site is not available, viable or suitable for large format retail floorspace development.

APPENDIX 6: ECONOMIC IMPACT ASSESSMENT – EXPLANATORY NOTE

APPENDIX 6:

ECONOMIC IMPACT ASSESSMENT – EXPLANATORY NOTE

This explanatory note should be read alongside **Section 5** of the RPA.

The detailed economic tabulations for convenience and comparison goods are set out in **Appendix 7** and **Appendix 8** respectively.

Baseline Assumptions & Evidence Base

The following baseline assumptions and sources of information have been used to inform our economic impact assessment. Where possible these assumptions have been agreed with the Council and/or their retail planning advisor.

- a base year of 2010 (i.e. the year in which the application is submitted);
- a forecast year of 2015. This represents a *"reasonable"* five year period for the assessment of impact as identified by PPS4 (EC16.1.d) and also allows for the new floorspace to achieve 'settled' trading patterns;
- all monetary values are expressed in 2008 prices;
- the most up-to-date average expenditure per capita levels for comparison and convenience goods have been derived from the *'Retail Area Planner Reports'* specifically produced by Experian Business Strategies (hereafter referred to as 'EBS') for the defined catchment areas and study zones;
- an allowance for Special Forms of Trading ('SFT') has been applied to average per capita expenditure levels at the base year. This is informed by the latest EBS research set out in *'Retail Planner Briefing Note 8.1'* published in August 2010;
- the forecast growth in convenience and comparison goods expenditure per capita levels has also been informed by the latest EBS *Briefing Note*;
- The base year population estimates and projections have been derived from the EBS *'Retail Area Planner Reports'*;
- the estimates of 'benchmark' company average sales densities have been informed by published research by Mintel and Verdict. The turnover estimates are also informed by the 2007 PRS and SP's own informed judgements as to the trading performance of centres and individual stores; and
- a reasonable allowance is made for the improved 'productivity' of both existing and proposed convenience and comparison retail floorspace over the forecast period in accordance with PPS4 advice.

Approach

The economic impact assessment is based on a 'step-by-step' approach, such that all the main assumptions and forecasts can be easily tested. This approach is in a accordance with advice set out in PPS4 *Town Centre Practice Guidance*.

The main stages in the economic impact assessment for both convenience goods and comparison goods retailing are as follows:

- **Step 1:** define the primary catchment area for the retail floorspace proposals.
- **Step 2:** assess the total available convenience and comparison goods expenditure in the defined catchment areas between 2010 and 2015 based on the forecast growth in expenditure per capita and population projections.
- **Step 3:** determine the existing provision of town centre and out-of-centre comparison and convenience goods floorspace in the defined catchment area and the likely 'benchmark' turnovers.
- **Step 4:** identify the commitments / proposals for new retail floorspace in the catchment area and forecast their likely turnover performance.
- **Step 5:** set out the baseline 'market share analysis' for the main study zones based on household telephone interview survey evidence, where available.
- **Step 6:** apply the (survey-based) market shares to the available expenditure in each study zone over the forecast period to determine the 'actual' (or 'potential') turnover of the proposed retail floorspace at the base year.
- **Step 7:** project forward the 'potential' turnovers to the forecast year based on a constant market share approach.
- **Step 8:** assess the likely trading profile of the proposed retail floorspace and the likely trade draw draw from competing centres and stores, based on informed adjustments to the market shares of centres and stores at the 'design year'.
- **Step 9:** forecast the monetary trade diversion and percentage impact of the proposed retail floorspace based on the changes in the 'potential' turnover of the main centres and stores at 2015, "before" and "after" the development.
- **Step 10:** finally, compare the 'potential' turnovers at 2015 ("after" the proposed development) with the estimated 'benchmark' turnovers to determine the overall viability of the existing retail floorspace (i.e. are existing centres and stores trading above or below 'benchmark' levels post-development). This provides a quantitative trading assessment of the potential impact of retail proposals on centre turnover. The likely effects on the overall vitality and viability of centres will be informed by the results of the qualitative health check assessments and other research, including any survey evidence.

Catchment Area Definition

The definition of the catchment area for the foodstore proposal has been described in some detail elsewhere in the RPA. The store's PCA comprises Zone 2 (St Ives) and Zone 3 (Hayle) of the 2007 *Penwith Retail Study* (PRS). The 'rest of the study area' (ROSA) consists of Zone 1 (Penzance), Zone 4 (Marazion/ Breage) and Zone 5 (Camborne).

For the non-food retail floorspace we have necessarily had to adopt a slightly different PCA in order to draw on the most recent non-food shopping patterns and market shares identified by the Cornwall-wide household survey. This survey was commissioned to help inform the preparation of the *Cornwall Retail Study**. It is preferred to the survey conducted in 2007 for the PRS as it is more up-to-date and also takes account of recent new retail floorspace developments. However, the one drawback of using the Cornwall-wide survey is that it has adopted slightly different survey zones to the 2007 PRS. The main difference being that Zones 3 and 4 of the 2007 PRS have been combined into one study zone (Zone 3) by the *Cornwall Retail Study*. As a result, the PCA for comparison goods shopping is slightly wider than for the foodstore (i.e. it comprises Zones 2, 3 and 4 of the 2007 PRS). This is a reasonable and robust assumption in our judgement, as non-food shopping patterns generally cover a wider catchment than for food shopping.

Base Year Population and Projections (2010 – 2015)

Table 1 (**Appendix 6**) sets out the base year population for the foodstore proposal. The total population in the study area is 90,376 in 2010 and this is projected to increase to 94,438 by 2015. The PCA population is 27,014 and this is projected to increase by +4.4% (to 28,193) by 2015.

Table 1 (Appendix 7) shows the slightly different population figures adopted for the non-food retail floorspace, which reflect the different study zones assumed for the Cornwall-wide household survey. In this case the total base year study area population is slightly larger at 99,816, as this includes the wider area covered by Zone 1. The PCA population of 38,943 is also higher than the foodstore's PCA as it comprises Zones 2, 3 and 4 of the 2007 PRS.

It is important to note that the EBS-based population projections do not take account of policy-led residential allocations in the study area. Given the significant residential development planned for Hayle over the medium to long term, it is likely that the EBS projections will under-estimate the PCA's population growth up to 2015 and beyond.

Available Expenditure and Special Forms of Trading (SFT)

Table 2 shows the average convenience goods expenditure levels for convenience goods (**Appendix 6**) and comparison goods (**Appendix 7**). The expenditure figures have been derived from EBS and reflect the underlying demographic and socio-economic characteristics of Hayle's population. Please note that we have deducted expenditure associated with 'non-

* please note that this study had not been finalised at the time of preparing our RPA

store'† retail sales from the base year expenditure levels based on the latest research and forecasts by EBS in the August 2010 *Briefing Note*. Up to 2015 we have also made an allowance for the likely growth in the market share of SFT. The market shares for convenience goods retailing have been adjusted downwards to take account of the fact that the retail sales figures include supermarkets that source internet goods sales from store space and, as a result, the share of non-store retailing is over-stated.

Expenditure Growth Forecasts

The expenditure per capita growth forecasts for both convenience and comparison goods retailing are also informed by the latest EBS August 2010 *Briefing Note*. These forecasts take into account the impact of the economic downturn on retail spending growth. It is relevant to note that the latest EBS forecasts are significantly lower than previous forecasts based on historic trend-based 'long' term and 'ultra long' term projections. Given that the *Practice Guidance* advises that expenditure per capita expenditure growth rates should *"...draw on national long-term trends"* (paragraph B.21), we consider that our more cautious growth rates over the medium to long term may have under-estimated the potential for retail expenditure up to 2015, particularly for comparison goods expenditure.

Total Available Expenditure

The total available expenditure set out in Table 3 for convenience goods (**Appendix 6**) and comparison goods (**Appendix 7**) is derived by multiplying the resident population within each zone (Table 1) by the expenditure per capita levels (Table 2) over the forecast period.

Existing Floorspace and 'Benchmark' Turnover Levels

Table 4 sets out the estimated sales area and 'benchmark' turnover estimates for the main convenience goods (**Appendix 6**) and comparison goods retail floorspace (**Appendix 7**) within the PCA and across the wider study area. The floorspace estimates have been informed by the 2007 PRS; the 2008 *Kerrier Retail Study*; the IGD Foodstores dataset; the *Trevor Wood Retail Retail Warehouse Database*; and other relevant retail studies.

Market Share Analysis

The 'market share analysis' for main 'bulk' and top-up food shopping trips across the PCA and wider study area has been informed by the combined results of the 2007 and 2009 household surveys commissioned for the 2007 PRS and for Sainsbury's application at Marsh Lane.

As stated previously, the rationale for combining the different survey results is based on the fact that the Marks and Spencer foodhall on West Cornwall Retail Park and the Lidl extension have all opened since the 2007 household survey was conducted. We consider that the more recent survey results will have helped to *"smooth out"* any significant discrepancies in market shares.

† The Practice Guidance (Appendix A) defines special forms of trading as all retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, party plan, vending machines, door-to-door and temporary open market stalls.

For comparison goods the base year market share patterns have been derived from the results of the recent Cornwall-wide survey.

Expenditure Inflow

Our assessment of the likely trade draw of existing stores and shops from beyond the PCA has been informed by the 2007 PRS and our own assumptions as to the relative attraction of stores and shopping locations. It is widely accepted that the trade draw of shopping locations is a function of the size, range, quality and attraction of their offer, compared with the location, scale and offer in competing centres and stores. In this case we also take account of the fact that shops and stores in both Hayle and St Ives will benefit from significant expenditure inflow derived from tourists and visitors to these centres and the wider area.

Commitments

It has been assumed for the purpose of our assessment that the other applications and proposals for foodstores in Hayle are all seeking to serve the identified need for convenience goods shopping in Hayle and that only one store will be permitted to meet this need. We have not therefore carried out a cumulative impact assessment.

Outside of the PCA, we consider that the permitted Tesco extension and new Sainsbury's stores in Helston will have a limited draw from Hayle's PCA. Notwithstanding this, the strengthening of Helston's foodstore offer reinforces the need for a new 'anchor' foodstore in Hayle town centre to help stem the substantial and increasing 'leakage' of shoppers and retail expenditure to competing stores.

Please note that we have not identified any commitments for additional new comparison goods floorspace in the PCA.

'Potential' Turnover Estimates

By applying the market shares to the available expenditure in each zone it is possible to assess the 'actual' turnover of centres and stores at the base year. The base year turnover estimates for convenience goods are set out in Table 10 (Appendix 6) and for comparison goods in Table 7 (Appendix 7). These turnovers are then projected forward to 2015 assuming constant market shares over the forecast period. The turnover estimates at 2015 provide the robust baseline position for assessing the potential impact of the proposed new retail floorspace on shopping patterns and expenditure flows across the PCA and ROSA, in accordance with advice set out in the *Practice Guidance*.

Turnover of Proposed Retail Floorspace

Our assessment of the likely turnover potential of the proposed foodstore and non-food retail floorspace is set out in more detail in **Section 6** to the RPA. We have tested a range of turnover levels based on the likely trading performance of different retailers and types of retailing that could potentially occupy the proposed floorspace. This is in accordance with advice set out in the *Practice Guidance*.

Trade Draw & Impact Analysis

The final step in the economic assessment assesses the impact of the proposed convenience and comparison goods sales area on market share levels. This is a robust approach that takes account of the changing nature of consumer spending over time due to new development, as opposed to holding market shares at a theoretical constant. The commercial reality is that market shares will change based on the changing attraction of centres and stores due to new investment, development and proactive management and marketing.

APPENDIX 7: CONVENIENCE GOODS IMPACT ASSESSMENT

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SOUTH QUAY - HAYLE: FOODSTORE PROPOSAL

Convenience Goods Impact Assessment

TABLE 1: POPULATION PROJECTIONS (2010 - 2015)

ZONES:	GEOGRAPHIC AREA:	2010	2011	2012	2013	2014	2015	GROWTH: 2010 - 15
Zone 1:	PENZANCE	25,460	25,647	25,910	26,109	26,377	26,557	4.3%
Zone 2:	ST IVES	12,729	12,769	12,872	12,971	13,054	13,127	3.1%
Zone 3:	HAYLE	14,285	14,410	14,597	14,785	14,925	15,066	5.5%
Zone 4:	MARAZION / BREAGE	11,929	11,955	12,017	12,098	12,178	12,244	2.6%
Zone 5:	CAMBORNE	25,973	26,255	26,544	26,904	27,160	27,444	5.7%
TOTAL:		**90,376**	**91,036**	**91,940**	**92,867**	**93,694**	**94,438**	**4.5%**
Zones 2 & 3:	**'PRIMARY' CATCHMENT AREA (PCA):**	**27,014**	**27,179**	**27,469**	**27,756**	**27,979**	**28,193**	4.4%
Zones 1, 4 & 5:	**REST OF STUDY AREA (ROSA):**	**63,362**	**63,857**	**64,471**	**65,111**	**65,715**	**66,245**	4.6%

SOURCES: 2010 population and projections informed by Experian Business Strategies (EBS) *'Retail Area Planner Reports' derived from the Experian MMG3 Geographic Information System (GIS).*

NOTES: Please note that the population projections do not take account of policy-led residential allocations or the uplift in population and expenditure that will arise from the new residential units proposed as part of the South Quay application.

TABLE 2: CONVENIENCE GOODS EXPENDITURE PER CAPITA (2010 - 2015). Excluding Special Forms of Trading (SFT)

ZONES:	GEOGRAPHIC AREA:	2010	2011	2012	2013	2014	2015
Zone 1:	PENZANCE	£1,757	£1,750	£1,754	£1,765	£1,776	£1,788
Zone 2:	ST IVES	£1,806	£1,799	£1,803	£1,815	£1,826	£1,838
Zone 3:	HAYLE	£1,734	£1,728	£1,731	£1,742	£1,753	£1,765
Zone 4:	MARAZION / BREAGE	£1,879	£1,872	£1,876	£1,888	£1,900	£1,912
Zone 5:	CAMBORNE	£1,660	£1,654	£1,657	£1,668	£1,679	£1,690

SOURCES: Base year (2010) average spend per capita estimates are derived from the Experian *Retail Area Planner Reports* (March 2010). All monetary figures are expressed in 2008 price base and are inclusive of VAT.

Annual convenience goods expenditure growth forecasts are informed by Experian Business Strategies (EBS) *Retail Planner Briefing Note 8.1 - Update* (August 2010: Figure 1). Assume annual growth rates of +0.3% for 2010; +0.0% for 2011; +0.4% for 2012; and

SFT market shares have been informed by EBS *Retail Planning Briefing Note 8.1* (Appendix 3). An allowance has been made for the fact that a significant proportion of internet convenience sales are through existing stores.

TABLE 3: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, 2010 - 2015 (£ million)

ZONES:	GEOGRAPHIC AREA:	2010	2011	2012	2013	2014	2015	GROWTH: £ m	GROWTH: %
Zone 1:	PENZANCE	£44.7	£44.9	£45.4	£46.1	£46.9	£47.5	£2.7	6.1%
Zone 2:	ST IVES	£23.0	£23.0	£23.2	£23.5	£23.8	£24.1	£1.1	4.9%
Zone 3:	HAYLE	£24.8	£24.9	£25.3	£25.8	£26.2	£26.6	£1.8	7.3%
Zone 4:	MARAZION / BREAGE	£22.4	£22.4	£22.5	£22.8	£23.1	£23.4	£1.0	4.4%
Zone 5:	CAMBORNE	£43.1	£43.4	£44.0	£44.9	£45.6	£46.4	£3.2	7.5%
TOTAL:		**£158.0**	**£158.6**	**£160.5**	**£163.1**	**£165.6**	**£168.0**	**£9.9**	**6.3%**
Zones 2 & 3:	**'PRIMARY' CATCHMENT AREA (PCA):**	**£47.8**	**£47.9**	**£48.5**	**£49.3**	**£50.0**	**£50.7**	**£3.0**	**6.2%**
Zones 1, 4 & 5:	**REST OF STUDY AREA (ROSA):**	**£110.3**	**£110.7**	**£112.0**	**£113.8**	**£115.6**	**£117.3**	**£7.0**	**6.3%**

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TABLE 4: EXISTING RETAIL FLOORSPACE AND ESTIMATED 'BENCHMARK' TURNOVERS (@2008 prices)

		NOTES:	1	2	3	4	5	6
			Sales Area	**Food Sales Area**		**Sales Density**	**2010 Turnover**	**2015 Turnover**
Food Store:	**Address:**		sq m net	%	m^2 net	£ / m^2	£ m	£ m
HAYLE: TOWN CENTRE STORES & FLOORSPACE								
Co-op	Copper Terrace		995	90%	896	£5,800	£5.2	£5.3
Other Stores:	Hayle		660	80%	528	£3,500	£1.8	£1.9
		SUB-TOTAL:	**1,655**		**1,424**	**£4,947**	**£7.0**	**£7.1**
HAYLE: OUT-OF-CENTRE STORES								
Lidl	Carwin Rise, Hayle		1,407	80%	1,126	£3,000	£3.4	£3.4
M&S Simply Food	West Cornwall Retail Park		1,580	29%	465	£11,000	£5.1	£5.2
		SUB-TOTAL:	**2,987**		**1,591**	**£5,338**	**£8.5**	**£8.6**
ST IVES / CARBIS BAY: TOWN CENTRE STORES & FLOORSPACE								
Co-op	Royal Square, St Ives		170	95%	162	£5,800	£0.9	£0.9
Co-op	Tregenna Place, St Ives		260	95%	247	£5,800	£1.4	£1.4
Other Stores:	Carbis Bay		312	95%	296	£2,750	£0.8	£0.8
Other Stores:	St Ives		897	80%	718	£3,500	£2.5	£2.5
		SUB-TOTAL:	**1,639**		**1,423**	**£4,004**	**£5.7**	**£5.8**
ST IVES / CARBIS BAY: OUT-OF-CENTRE STORES								
Co-op	The Stennack, St Ives		234	95%	222	£5,800	£1.3	£1.3
Tesco	St Ives Road, Carbis Bay		1,578	80%	1,262	£13,000	£16.4	£16.6
		SUB-TOTAL:	**1,812**		**1,485**	**£11,922**	**£17.7**	**£17.9**
PENZANCE: OUT-OF-CENTRE STORES								
Tesco	Branwell Lane, Penzance		2,266	80%	1,812	£13,000	£23.6	£23.8
Morrisons	Business Park, Penzance		2,657	80%	2,126	£11,500	£24.4	£24.7
Lidl			743	85%	632	£3,000	£1.9	£1.9
Co-op	Wherrytown		488	95%	464	£5,800	£2.7	£2.7
		SUB-TOTAL:	**6,154**		**5,034**	**£10,447**	**£52.6**	**£53.2**
PENZANCE: TOWN CENTRE CENTRE STORES								
Co-op stores			619	90%	557	£5,800	£3.2	£3.3
Iceland			467	90%	420	£5,250	£2.2	£2.2
Other Stores			2,500	80%	2,000	£4,000	£8.0	£8.1
		SUB-TOTAL:	**3,586**		**2,977**	**£4,513**	**£13.4**	**£13.6**
NEWLYN: TOWN CENTRE CENTRE STORES								
Co-op	The Strand		203	95%	193	£5,800	£1.1	£1.1
Other Stores			150	95%	143	£3,250	£0.5	£0.5
		SUB-TOTAL:	**353**		**336**	**£4,715**	**£1.6**	**£1.6**
CAMBORNE / POOL:								
Tesco	Wesley St, Camborne (out-of-centre)		1,924	85%	1,635	£13,000	£21.3	£21.5
Tesco Extra	Station Rd, Pool (out-of-centre)		6,503	50%	3,252	£13,000	£42.3	£42.8
Morrisons	Agar Rd, Pool (out-of-centre)		2,807	85%	2,386	£11,500	£27.4	£27.8
		SUB-TOTAL:	**11,234**		**7,273**	**£12,508**	**£91.0**	**£92.1**

NOTES:

(1) Total sales areas informed by *Penwith Retail Study* (2007) - Appendix D (Tables14 & 14D). Please note that Lidl sales area includes the permitted extension. Sales areas of foodstores in Camborne and Pool informed by the *Kerrier Retail Study* (2008)

(2) Estimates of food / non-food sales area ratios informed by *Penwith Retail Study* (2007), *Kerrier Retail Study* (2008) and SP judgements based on health check assessment and audits.

(3) Estimates of convenience goods sales areas derived from food / non food sales ratio.

(4) The 'benchmark' company average sales densities have been informed by the *Penwith Retail Study* (2007). Sales estimates have been updated to take account of the latest published figures by Verdict and Mintel ('*UK Retail Rankings*') and our own estimates of the trading performance of centres and stores based on the health check assessments / audits and the impact of the economic recession on sales

(5) 2010 'benchmark' turnovers derived by applying the estimated average sales densities (4) to the convenience goods sales areas (3).

(6) 2015 'benchmark' turnovers derived by applying an annual 'productivity' growth rate +0.4% for 2013-15

TABLE 5: FOODSTORE PROPOSAL - CONVENIENCE GOODS FLOORSPACE AND TURNOVER FORECASTS (@2008 prices)

		NOTES:	1	2	3	4	5	6
			Total Sales Area	**Food Sales Area**		**Sales Density**	**2010 Turnover**	**2015 Turnover**
			sq m net	%	m^2 net	£ / m^2	£ m	£ m
SCENARIO 1:	South Quay - Foodstore Proposal:		2,550	65%	1,658	£10,000	£16.6	£16.8
SCENARIO 2:	South Quay - Foodstore Proposal:		2,550	65%	1,658	£13,000	£21.5	£21.8

NOTES:

(1) Total sales areas of proposed foodstore is based on the Competition Commission definition.

(2) 65% of the proposed store's total sales area will be set aside for convenience goods retailing and 35% for non-food sales.

(4) There is no named operator for the proposed store. If permission is granted the store has been designed (in terms of scale, format, layout, car parking, service facilities, etc.) to appeal to all the major grocery operators. In our judgement the proposed store will achieve an average sales levels of circa £10,000 per m^2. For the purpose of this assessment the effects of a higher potential average sales density of c.£13,000 per m^2 has also been tested.

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TABLE 6: 2010 MAIN 'BULK' FOOD SHOPPING PATTERNS - MARKET SHARE ANALYSIS (%)

		PENWITH RETAIL STUDY - SURVEY ZONES:	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8
ZONE 3:	**HAYLE TOWN CENTRE:**									
		Co-Op, Copperhouse:	0.0%	3.3%	18.7%	0.7%	0.0%	0.0%	0.0%	0.0%
		Other Convenience Stores:	0.0%	0.0%	0.8%	0.0%	0.7%	0.0%	0.0%	0.0%
	HAYLE OUT-OF-CENTRE:									
		Lidl	0.0%	2.5%	8.7%	0.7%	0.3%	0.0%	0.0%	0.7%
		Marks & Spencer - West Cornwall RP	0.5%	1.2%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%
	HAYLE MARKET SHARE:		**0.5%**	**7.0%**	**28.6%**	**1.4%**	**1.0%**	**0.0%**	**0.0%**	**0.7%**
ZONE 2:	**ST IVES / CARBIS BAY**									
	Town Centres:									
		Co-op, Royal Square	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
		Co-op, Tregenna Place	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
		Other Shops & Stores:	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Out-of-Centre:									
		Co-op, The Stennack	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
		Tesco, St Ives Road	0.0%	55.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%
ZONE 1:	**PENZANCE / NEWLYN**									
	Penzance Out-of-Centre:									
		Tesco, Branwell Lane	43.9%	4.5%	13.5%	17.7%	0.0%	43.4%	0.0%	0.0%
		Morrisons, Business Park	34.9%	10.3%	17.1%	32.7%	0.3%	32.5%	1.7%	0.0%
		Co-op, Wherrytown:	3.2%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	0.0%
		Lidl	2.6%	0.0%	0.0%	2.0%	0.0%	4.8%	0.0%	0.0%
	Penzance Town Centre:									
		Co-op stores	6.9%	0.0%	0.0%	0.0%	0.0%	6.0%	0.0%	0.0%
		Iceland	1.1%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%
		Other shops & stores	3.2%	0.0%	0.4%	0.7%	0.0%	0.0%	0.0%	0.0%
	Newlyn									
		Co-op, The Strand	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
		Other shops & stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OTHER MAJOR CENTRES / STORES ELSEWHERE:										
		Tesco Extra, Pool	0.0%	3.3%	4.8%	0.0%	14.3%	0.0%	0.6%	44.2%
		Tesco, Camborne	0.0%	7.0%	26.2%	1.4%	62.2%	0.0%	0.0%	2.0%
		Tesco, Helston	0.0%	0.0%	1.6%	33.3%	0.0%	0.0%	76.9%	0.7%
		Morrisons, Pool	0.0%	2.1%	2.8%	0.0%	11.9%	0.0%	1.2%	10.9%
	All other shops & stores:		1.1%	5.4%	2.8%	10.9%	10.2%	9.6%	19.7%	41.5%
TOTAL:			**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

TABLE 7: 2010 TOP-UP FOOD SHOPPING PATTERNS - MARKET SHARE ANALYSIS (%)

		PENWITH RETAIL STUDY - SURVEY ZONES:	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8
ZONE 3:	**HAYLE TOWN CENTRE:**									
		Co-Op, Copperhouse:	0.7%	7.2%	40.5%	1.1%	0.0%	0.0%	0.0%	0.0%
		Other Convenience Stores:	0.0%	2.6%	16.1%	0.0%	1.1%	0.0%	0.0%	0.0%
	HAYLE OUT-OF-CENTRE:									
		Lidl	0.7%	3.6%	13.1%	0.0%	0.0%	0.0%	0.0%	0.0%
		Marks & Spencer - West Cornwall RP	0.7%	2.1%	3.0%	3.2%	0.5%	0.0%	0.0%	0.0%
	HAYLE MARKET SHARE:		**2.1%**	**15.4%**	**72.6%**	**4.3%**	**1.6%**	**0.0%**	**0.0%**	**0.0%**
ZONE 2:	**ST IVES / CARBIS BAY**									
	Town Centres:									
		Co-op, Royal Square	0.0%	6.7%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
		Co-op, Tregenna Place	0.0%	7.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
		Other Shops & Stores:	0.0%	12.3%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
	Out-of-Centre:									
		Co-op, The Stennack	0.0%	21.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
		Tesco, St Ives Road	0.0%	25.6%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ZONE 1:	**PENZANCE / NEWLYN**									
	Penzance Out-of-Centre:									
		Tesco, Branwell Lane	15.5%	1.0%	2.4%	10.8%	0.0%	4.7%	0.0%	0.0%
		Morrisons, Business Park	12.0%	1.5%	4.8%	10.8%	0.0%	7.8%	2.8%	0.0%
		Co-op, Wherrytown:	4.9%	0.5%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%
		Lidl	2.8%	0.0%	0.0%	0.0%	0.0%	4.7%	0.9%	0.0%
	Penzance Town Centre:									
		Co-op stores	21.1%	0.5%	0.0%	1.1%	0.0%	6.3%	0.0%	0.0%
		Iceland	5.6%	0.5%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%
		Other shops & stores	16.9%	0.5%	0.6%	12.9%	0.0%	7.8%	0.9%	0.0%
	Newlyn									
		Co-op, The Strand	10.6%	0.0%	0.0%	0.0%	0.0%	3.1%	0.0%	0.0%
		Other shops & stores	1.4%	0.0%	0.0%	1.1%	0.0%	4.7%	0.0%	0.0%
OTHER MAJOR CENTRES / STORES ELSEWHERE:										
		Tesco Extra, Pool	0.0%	0.5%	0.0%	0.0%	7.0%	0.0%	0.0%	17.0%
		Tesco, Camborne	0.0%	2.1%	4.8%	0.0%	37.3%	0.0%	0.9%	0.9%
		Tesco, Helston	0.0%	0.0%	1.2%	14.0%	0.0%	0.0%	32.4%	0.0%
		Morrisons, Pool	0.0%	0.0%	1.8%	0.0%	5.4%	0.0%	0.0%	5.7%
	All other shops & stores:		7.0%	4.1%	7.7%	44.1%	48.6%	59.4%	62.0%	76.5%
TOTAL:			**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

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TABLE 8: 2010 MAIN 'BULK' FOOD SHOPPING PATTERNS - MARKET SHARE ANALYSIS (£ million)

STUDY ZONE / CENTRES / STORES:	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	TOTAL:	HAYLE: PCA
Main food purchases as % of total available spend:	65%	65%	65%	65%	65%		Zones 2 & 3
	£29.07	£14.94	£16.10	£14.57	£28.03	£102.72	£31.04
ZONE 3: HAYLE TOWN CENTRE:							
Co-Op, Copperhouse:	£0.00	£0.49	£3.00	£0.10	£0.00	£3.60	£3.50
Other Convenience Stores:	£0.00	£0.00	£0.13	£0.00	£0.19	£0.32	£0.13
HAYLE OUT-OF-CENTRE:							
Lidl	£0.00	£0.37	£1.41	£0.10	£0.10	£1.97	£1.78
Marks & Spencer - West Cornwall RP	£0.15	£0.19	£0.06	£0.00	£0.00	£0.40	£0.25
HAYLE MARKET SHARE:	**£0.15**	**£1.05**	**£4.60**	**£0.20**	**£0.29**	**£6.29**	**£5.65**
ZONE 2: ST IVES / CARBIS BAY							
Town Centres:							
Co-op, Royal Square	£0.00	£0.25	£0.00	£0.00	£0.00	£0.25	£0.25
Co-op, Tregenna Place	£0.00	£0.12	£0.00	£0.00	£0.00	£0.12	£0.12
Other Shops & Stores:	£0.00	£0.06	£0.00	£0.00	£0.00	£0.06	£0.06
Out-of-Centre:							
Co-op, The Stennack	£0.00	£0.37	£0.00	£0.00	£0.00	£0.37	£0.37
Tesco, St Ives Road	£0.00	£8.21	£0.38	£0.00	£0.00	£8.60	£8.60
ZONE 1: PENZANCE / NEWLYN							
Penzance Out-of-Centre:							
Tesco, Branwell Lane	£12.77	£0.68	£2.17	£2.58	£0.00	£18.20	£2.85
Morrisons, Business Park	£10.15	£1.54	£2.75	£4.76	£0.10	£19.30	£4.29
Co-op, Wherrytown:	£0.92	£0.00	£0.00	£0.00	£0.00	£0.92	£0.00
Lidl	£0.77	£0.00	£0.00	£0.30	£0.00	£1.07	£0.00
Penzance Town Centre:							
Co-op stores	£2.00	£0.00	£0.00	£0.00	£0.00	£2.00	£0.00
Iceland	£0.31	£0.00	£0.00	£0.00	£0.00	£0.31	£0.00
Other shops & stores	£0.92	£0.00	£0.06	£0.10	£0.00	£1.09	£0.06
Newlyn							
Co-op, The Strand	£0.77	£0.00	£0.00	£0.00	£0.00	£0.77	£0.00
Other shops & stores	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
OTHER MAJOR CENTRES / STORES ELSEWHERE:							
Tesco Extra, Pool	£0.00	£0.49	£0.77	£0.00	£4.00	£5.26	£1.26
Tesco, Camborne	£0.00	£1.05	£4.22	£0.20	£17.45	£22.91	£5.27
Tesco, Helston	£0.00	£0.00	£0.26	£4.86	£0.00	£5.11	£0.26
Morrisons, Pool	£0.00	£0.31	£0.45	£0.00	£3.34	£4.09	£0.76
All other shops & stores:	£0.31	£0.80	£0.45	£1.59	£2.86	£6.00	£1.25
TOTAL:	**£29.07**	**£14.94**	**£16.10**	**£14.57**	**£28.03**	**£102.72**	**£31.04**

TABLE 9: 2010 TOP-UP FOOD SHOPPING PATTERNS - MARKET SHARE ANALYSIS (£ million)

STUDY ZONE / CENTRES / STORES:	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	TOTAL:	HAYLE: PCA
Top-up food shop as % of total available spend:	35%	35%	35%	35%	35%		Zones 2 & 3
	£15.66	£8.05	£8.67	£7.84	£15.09	£55.31	£16.72
ZONE 3: HAYLE TOWN CENTRE:							
Co-Op, Copperhouse:	£0.11	£0.58	£3.51	£0.08	£0.00	£4.28	£4.09
Other Convenience Stores:	£0.00	£0.21	£1.39	£0.00	£0.16	£1.76	£1.60
HAYLE OUT-OF-CENTRE:							
Lidl	£0.11	£0.29	£1.14	£0.00	£0.00	£1.53	£1.42
Marks & Spencer - West Cornwall RP	£0.11	£0.17	£0.26	£0.25	£0.08	£0.87	£0.42
HAYLE MARKET SHARE:	**£0.33**	**£1.24**	**£6.30**	**£0.34**	**£0.24**	**£8.45**	**£7.53**
ZONE 2: ST IVES / CARBIS BAY							
Town Centres:							
Co-op, Royal Square	£0.00	£0.54	£0.05	£0.00	£0.00	£0.59	£0.59
Co-op, Tregenna Place	£0.00	£0.62	£0.00	£0.00	£0.00	£0.62	£0.62
Other Shops & Stores:	£0.00	£0.99	£0.05	£0.00	£0.00	£1.04	£1.04
Out-of-Centre:							
Co-op, The Stennack	£0.00	£1.69	£0.00	£0.00	£0.00	£1.69	£1.69
Tesco, St Ives Road	£0.00	£2.06	£0.26	£0.00	£0.00	£2.32	£2.32
ZONE 1: PENZANCE / NEWLYN							
Penzance Out-of-Centre:							
Tesco, Branwell Lane	£2.43	£0.08	£0.21	£0.84	£0.00	£3.56	£0.29
Morrisons, Business Park	£1.87	£0.12	£0.41	£0.84	£0.00	£3.25	£0.54
Co-op, Wherrytown:	£0.77	£0.04	£0.00	£0.00	£0.00	£0.81	£0.04
Lidl	£0.44	£0.00	£0.00	£0.00	£0.00	£0.44	£0.00
Penzance Town Centre:							
Co-op stores	£3.31	£0.04	£0.00	£0.08	£0.00	£3.43	£0.04
Iceland	£0.88	£0.04	£0.00	£0.08	£0.00	£1.01	£0.04
Other shops & stores	£2.65	£0.04	£0.05	£1.01	£0.00	£3.75	£0.09
Newlyn							
Co-op, The Strand	£1.65	£0.00	£0.00	£0.00	£0.00	£1.65	£0.00
Other shops & stores	£0.22	£0.00	£0.00	£0.08	£0.00	£0.30	£0.00
OTHER MAJOR CENTRES / STORES ELSEWHERE:							
Tesco Extra, Pool	£0.00	£0.04	£0.00	£0.00	£1.06	£1.10	£0.04
Tesco, Camborne	£0.00	£0.17	£0.41	£0.00	£5.63	£6.21	£0.58
Tesco, Helston	£0.00	£0.00	£0.10	£1.10	£0.00	£1.20	£0.10
Morrisons, Pool	£0.00	£0.00	£0.15	£0.00	£0.82	£0.97	£0.15
All other shops & stores:	£1.10	£0.33	£0.67	£3.46	£7.34	£12.90	£1.00
TOTAL:	**£15.66**	**£8.05**	**£8.67**	**£7.84**	**£15.09**	**£55.31**	**£16.72**

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SOUTH QUAY - HAYLE: FOODSTORE PROPOSAL

Convenience Goods Impact Assessment

TABLE 10: 2010 TURNOVER ESTIMATES - MARKET SHARE & TRADE DRAW ANALYSIS

STUDY ZONE / CENTRES / STORES:	ZONE 1		ZONE 2		ZONE 3		ZONE 4		ZONE 5		Trade Draw from Outside Study Area		TOTAL:
Total Available Expenditure:		£44.7		£23.0		£24.8		£22.4		£43.1			£158.03
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	£m
ZONE 3: HAYLE TOWN CENTRE:													
Co-Op, Copperhouse:	0.2%	£0.11	4.7%	£1.07	26.3%	£6.51	0.8%	£0.18	0.0%	£0.00	10%	£0.9	£8.8
Other Convenience Stores:	0.0%	£0.00	0.9%	£0.21	6.1%	£1.52	0.0%	£0.00	0.8%	£0.35	5%	£0.1	£2.2
HAYLE OUT-OF-CENTRE:													
Lidl	0.2%	£0.11	2.9%	£0.66	10.3%	£2.54	0.4%	£0.10	0.2%	£0.10	15%	£0.6	£4.1
Marks & Spencer	0.6%	£0.26	1.5%	£0.35	1.3%	£0.32	1.1%	£0.25	0.2%	£0.08	50%	£1.3	£2.5
HAYLE MARKET SHARE:	**1.1%**	**£0.48**	**10.0%**	**£2.29**	**44.0%**	**£10.90**	**2.4%**	**£0.54**	**1.2%**	**£0.53**		**£2.9**	**£17.6**
ZONE 2: ST IVES / CARBIS BAY													
Town Centres:													
Co-op, Royal Square	0.0%	£0.00	3.4%	£0.78	0.2%	£0.05	0.0%	£0.00	0.0%	£0.00	25%	£0.3	£1.1
Co-op, Tregenna Place	0.0%	£0.00	3.2%	£0.74	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	10%	£0.1	£0.8
Other Shops & Stores:	0.0%	£0.00	4.6%	£1.05	0.2%	£0.05	0.0%	£0.00	0.0%	£0.00	5%	£0.1	£1.2
Out-of-Centre:													
Co-op, The Stennack	0.0%	£0.00	9.0%	£2.06	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	20%	£0.5	£2.6
Tesco, St Ives Road	0.0%	£0.00	44.7%	£10.28	2.6%	£0.64	0.0%	£0.00	0.0%	£0.00	30%	£4.7	£15.6
ZONE 1: PENZANCE / NEWLYN													
Penzance Out-of-Centre:													
Tesco, Branwell Lane	34.0%	£15.19	3.3%	£0.76	9.6%	£2.38	15.3%	£3.42	0.0%	£0.00	35%	£11.7	£33.5
Morrisons, Business Park	26.9%	£12.03	7.3%	£1.67	12.8%	£3.16	25.0%	£5.60	0.2%	£0.10	35%	£12.1	£34.7
Co-op, Wherrytown:	3.8%	£1.69	0.2%	£0.04	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	5%	£0.1	£1.8
Lidl	2.7%	£1.21	0.0%	£0.00	0.0%	£0.00	1.3%	£0.30	0.0%	£0.00	20%	£0.4	£1.9
Penzance Town Centre:													
Co-op stores	11.9%	£5.31	0.2%	£0.04	0.0%	£0.00	0.4%	£0.08	0.0%	£0.00	20%	£1.4	£6.8
Iceland	2.7%	£1.19	0.2%	£0.04	0.0%	£0.00	0.4%	£0.08	0.0%	£0.00	20%	£0.3	£1.6
Other shops & stores	8.0%	£3.57	0.2%	£0.04	0.5%	£0.12	5.0%	£1.11	0.0%	£0.00	20%	£1.2	£6.0
Newlyn													
Co-op, The Strand	5.4%	£2.42	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	20%	£0.6	£3.0
Other shops & stores	0.5%	£0.22	0.0%	£0.00	0.0%	£0.00	0.4%	£0.08	0.0%	£0.00	20%	£0.1	£0.4
OTHER MAJOR CENTRES / STORES ELSEWHERE:													
Tesco Extra, Pool	0.0%	£0.00	2.3%	£0.54	3.1%	£0.77	0.0%	£0.00	11.7%	£5.06	85%	£36.1	£42.4
Tesco, Camborne	0.0%	£0.00	5.3%	£1.21	18.7%	£4.63	0.9%	£0.20	53.5%	£23.08	40%	£19.4	£48.5
Tesco, Helston	0.0%	£0.00	0.0%	£0.00	1.4%	£0.36	26.6%	£5.95	0.0%	£0.00	85%	£35.8	£42.1
Morrisons, Pool	0.0%	£0.00	1.3%	£0.31	2.4%	£0.60	0.0%	£0.00	9.6%	£4.15	85%	£28.7	£33.8
All other shops & stores:	3.2%	£1.41	4.9%	£1.13	4.5%	£1.12	22.5%	£5.04	23.7%	£10.20			£18.9
TOTAL:	**100%**	**£44.7**	**100%**	**£23.0**	**100%**	**£24.8**	**100%**	**£22.4**	**100%**	**£43.1**			

TABLE 11: 2015 TURNOVER ESTIMATES - MARKET SHARE & TRADE DRAW ANALYSIS ('BEFORE' SOUTH QUAY FOODSTORE PROPOSAL)

STUDY ZONE / CENTRES / STORES:	ZONE 1		ZONE 2		ZONE 3		ZONE 4		ZONE 5		Trade Draw from Outside Study Area		TOTAL:
Total Available Expenditure:		**£47.5**		**£24.1**		**£26.6**		**£23.4**		**£46.4**			
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	£m
ZONE 3: HAYLE TOWN CENTRE:													
Co-Op, Copperhouse:	0.2%	£0.12	4.7%	£1.12	26.3%	£6.99	0.8%	£0.19	0.0%	£0.00	10%	£0.9	£9.4
Other Convenience Stores:	0.0%	£0.00	0.9%	£0.22	6.1%	£1.63	0.0%	£0.00	0.8%	£0.38	5%	£0.1	£2.3
HAYLE OUT-OF-CENTRE:													
Lidl	0.2%	£0.12	2.9%	£0.69	10.3%	£2.73	0.4%	£0.10	0.2%	£0.10	15%	£0.7	£4.4
Marks & Spencer	0.6%	£0.28	1.5%	£0.37	1.3%	£0.35	1.1%	£0.26	0.2%	£0.09	40%	£0.9	£2.2
HAYLE MARKET SHARE:	**1.1%**	**£0.51**	**10.0%**	**£2.40**	**44.0%**	**£11.69**	**2.4%**	**£0.56**	**1.2%**	**£0.57**		**£2.6**	**£18.4**
ZONE 2: ST IVES / CARBIS BAY													
Town Centres:													
Co-op, Royal Square	0.0%	£0.00	3.4%	£0.82	0.2%	£0.06	0.0%	£0.00	0.0%	£0.00	25%	£0.3	£1.2
Co-op, Tregenna Place	0.0%	£0.00	3.2%	£0.78	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	10%	£0.1	£0.9
Other Shops & Stores:	0.0%	£0.00	4.6%	£1.10	0.2%	£0.06	0.0%	£0.00	0.0%	£0.00	5%	£0.1	£1.2
Out-of-Centre:													
Co-op, The Stennack	0.0%	£0.00	9.0%	£2.16	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	20%	£0.5	£2.7
Tesco, St Ives Road	0.0%	£0.00	44.7%	£10.78	2.6%	£0.69	0.0%	£0.00	0.0%	£0.00	30%	£4.9	£16.4
ZONE 1: PENZANCE / NEWLYN													
Penzance Out-of-Centre:													
Tesco, Branwell Lane	34.0%	£16.13	3.3%	£0.80	9.6%	£2.55	15.3%	£3.57	0.0%	£0.00	35%	£12.4	£35.5
Morrisons, Business Park	26.9%	£12.77	7.3%	£1.75	12.8%	£3.39	25.0%	£5.85	0.2%	£0.10	35%	£12.8	£36.7
Co-op, Wherrytown:	3.8%	£1.80	0.2%	£0.04	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	5%	£0.1	£1.9
Lidl	2.7%	£1.28	0.0%	£0.00	0.0%	£0.00	1.3%	£0.31	0.0%	£0.00	20%	£0.4	£2.0
Penzance Town Centre:													
Co-op stores	11.9%	£5.63	0.2%	£0.04	0.0%	£0.00	0.4%	£0.09	0.0%	£0.00	20%	£1.4	£7.2
Iceland	2.7%	£1.26	0.2%	£0.04	0.0%	£0.00	0.4%	£0.09	0.0%	£0.00	20%	£0.3	£1.7
Other shops & stores	8.0%	£3.79	0.2%	£0.04	0.5%	£0.12	5.0%	£1.16	0.0%	£0.00	20%	£1.3	£6.4
Newlyn													
Co-op, The Strand	5.4%	£2.57	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	20%	£0.6	£3.2
Other shops & stores	0.5%	£0.23	0.0%	£0.00	0.0%	£0.00	0.4%	£0.09	0.0%	£0.00	20%	£0.1	£0.4
OTHER MAJOR CENTRES / STORES ELSEWHERE:													
Tesco Extra, Pool	0.0%	£0.00	2.3%	£0.56	3.1%	£0.82	0.0%	£0.00	11.7%	£5.45	85%	£38.7	£45.5
Tesco, Camborne	0.0%	£0.00	5.3%	£1.27	18.7%	£4.97	0.9%	£0.21	53.5%	£24.81	35%	£16.8	£48.1
Tesco, Helston	0.0%	£0.00	0.0%	£0.00	1.4%	£0.39	26.6%	£6.22	0.0%	£0.00	85%	£37.4	£44.0
Morrisons, Pool	0.0%	£0.00	1.3%	£0.32	2.4%	£0.65	0.0%	£0.00	9.6%	£4.47	85%	£30.8	£36.2
All other shops & stores:	3.2%	£1.50	4.9%	£1.19	4.5%	£1.20	22.5%	£5.27	23.7%	£10.97	95%	£382.4	£402.5
TOTAL:	**100%**	**£47.5**	**100%**	**£24.1**	**100%**	**£26.6**	**100%**	**£23.4**	**100%**	**£46.4**			

ING REAL ESTATE DEVELOPMENT

SOUTH QUAY - HAYLE: FOODSTORE PROPOSAL

Convenience Goods Impact Assessment

TABLE 12: 2015 REVISED MARKET SHARE & TRADE DRAW ANALYSIS ('AFTER' OPENING OF SOUTH QUAY FOODSTORE PROPOSAL)

	ZONE 1		ZONE 2		ZONE 3		ZONE 4		ZONE 5		Trade Draw from Outside Study Area		TOTAL:
Total Available Expenditure (£m):		£47.5		£24.1		£26.6		£23.4		£46.4			
	%	£m	%	£m	%	£m	%	£m	%	£m	%	£m	£m
ZONE 3: SOUTH QUAY FOODSTORE:													
Trade Draw:		3.5%		15.0%		60.0%		3.5%		3.0%	15.0%		100%
Market Share (% / £m):	**1.2%**	**£0.59**	**10.4%**	**£2.52**	**37.9%**	**£10.06**	**2.5%**	**£0.59**	**1.1%**	**£0.50**		**£2.52**	**£16.8**
ZONE 3: HAYLE TOWN CENTRE:													
Co-Op, Copperhouse:	0.2%	£0.08	4.0%	£0.97	21.4%	£5.68	0.4%	£0.10	0.0%	£0.00	10%	£0.8	£7.6
Other Convenience Stores:	0.0%	£0.00	0.8%	£0.19	5.6%	£1.48	0.0%	£0.00	0.8%	£0.37	5%	£0.1	£2.2
HAYLE OUT-OF-CENTRE:													
Lidl	0.2%	£0.09	2.6%	£0.62	6.9%	£1.82	0.3%	£0.07	0.1%	£0.07	18%	£0.6	£3.3
Marks & Spencer	0.5%	£0.25	1.4%	£0.34	0.7%	£0.19	0.9%	£0.22	0.2%	£0.07	44%	£0.9	£1.9
HAYLE MARKET SHARE:	**2.1%**	**£1.01**	**19.2%**	**£4.64**	**72.4%**	**£19.24**	**4.2%**	**£0.98**	**2.2%**	**£1.01**		**£4.9**	**£31.8**
ZONE 2: ST IVES / CARBIS BAY													
Town Centres:													
Co-op, Royal Square	0.0%	£0.00	3.4%	£0.81	0.2%	£0.06	0.0%	£0.00	0.0%	£0.00	25%	£0.3	£1.2
Co-op, Tregenna Place	0.0%	£0.00	3.2%	£0.77	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	10%	£0.1	£0.9
Other Shops & Stores:	0.0%	£0.00	4.6%	£1.10	0.2%	£0.05	0.0%	£0.00	0.0%	£0.00	5%	£0.1	£1.2
Out-of-Centre:													
Co-op, The Stennack	0.0%	£0.00	8.9%	£2.15	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	20%	£0.5	£2.7
Tesco, St Ives Road	0.0%	£0.00	42.5%	£10.26	1.3%	£0.34	0.0%	£0.00	0.0%	£0.00	31%	£4.7	£15.3
ZONE 1: PENZANCE / NEWLYN													
Penzance Out-of-Centre:													
Tesco, Branwell Lane	33.6%	£15.95	2.2%	£0.52	3.9%	£1.04	15.1%	£3.54	0.0%	£0.00	37%	£12.3	£33.3
Morrisons, Business Park	26.4%	£12.53	5.2%	£1.25	5.2%	£1.38	24.7%	£5.79	0.2%	£0.07	38%	£12.6	£33.6
Co-op, Wherrytown:	3.8%	£1.79	0.2%	£0.04	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	5%	£0.1	£1.9
Lidl	2.7%	£1.28	0.0%	£0.00	0.0%	£0.00	1.3%	£0.30	0.0%	£0.00	20%	£0.4	£2.0
Penzance Town Centre:													
Co-op stores	11.9%	£5.63	0.2%	£0.04	0.0%	£0.00	0.4%	£0.09	0.0%	£0.00	20%	£1.4	£7.2
Iceland	2.7%	£1.26	0.2%	£0.04	0.0%	£0.00	0.4%	£0.09	0.0%	£0.00	20%	£0.3	£1.7
Other shops & stores	8.0%	£3.78	0.2%	£0.04	0.5%	£0.12	5.0%	£1.16	0.0%	£0.00	20%	£1.3	£6.4
Newlyn													
Co-op, The Strand	5.4%	£2.57	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	0.0%	£0.00	20%	£0.6	£3.2
Other shops & stores	0.5%	£0.23	0.0%	£0.00	0.0%	£0.00	0.4%	£0.09	0.0%	£0.00	20%	£0.1	£0.4
OTHER MAJOR STORES ELSEWHERE:													
Tesco Extra, Pool	0.0%	£0.00	2.0%	£0.47	1.9%	£0.51	0.0%	£0.00	11.5%	£5.35	86%	£38.6	£44.9
Tesco, Camborne	0.0%	£0.00	3.4%	£0.82	10.4%	£2.75	0.6%	£0.14	53.3%	£24.69	37%	£16.6	£45.0
Tesco, Helston	0.0%	£0.00	0.0%	£0.00	0.7%	£0.18	26.1%	£6.10	0.0%	£0.00	86%	£37.3	£43.5
Morrisons, Pool	0.0%	£0.00	1.1%	£0.27	1.3%	£0.34	0.0%	£0.00	9.5%	£4.39	86%	£30.6	£35.7
All other shops & stores	3.0%	£1.43	3.7%	£0.89	2.1%	£0.57	22.0%	£5.14	23.4%	£10.85	95%	£381.4	£400.3
TOTAL:	**100%**	**£47.5**	**100%**	**£24.1**	**100%**	**£26.6**	**100%**	**£23.4**	**100%**	**£46.4**			

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SOUTH QUAY - HAYLE: FOODSTORE PROPOSAL

Convenience Goods Impact Assessment

SCENARIO 1: BASELINE TURNOVER ASSUMPTION

TABLE 13: 2015: IMPACT ASSESSMENT - SUMMARY TABLE

	see notes:	1	2	3	4	5	6	7	8	9
		2015: 'Potential' Turnover				Trade Draw & Diversion		2015: Turnover ('after')	2015: Impact	2015: Benchmark Turnover
		Draw from Zones 2/3	Draw from 'ROSA'	Draw from Elsewhere	Total Turnover	%	£m	£m	%	£m
	SOUTH QUAY - FOODSTORE:	-	-	-	-	-	**£16.8**	**£16.8**		
	Hayle Town Centre:									
	Co-Op, Copperhouse:	£8.1	£0.3	£0.9	£9.4	10%	-£1.7	£7.6	-18.5%	£5.3
	Other Convenience Stores:	£1.8	£0.4	£0.1	£2.3	1%	-£0.2	£2.2	-8.4%	£1.9
	TOTAL:	**£10.0**	**£0.7**	**£1.1**	**£11.7**	**12%**	**-£1.9**	**£9.8**	**-16.5%**	**£7.1**
	Hayle Out-of-Centre:									
	Lidl	£3.4	£0.3	£0.7	£4.4	7%	-£1.1	£3.3	-25.9%	£3.4
	Marks & Spencer	£0.7	£0.6	£0.9	£2.2	2%	-£0.3	£1.9	-13.6%	£5.2
	TOTAL:	**£4.1**	**£1.0**	**£1.6**	**£6.6**	**9%**	**-£1.4**	**£5.2**	**-21.7%**	**£8.6**
ZONE 2:	**ST IVES / CARBIS BAY**									
	All Town Centre Floorspace:	£2.8	£0.0	£0.4	£3.3	0%	£0.0	£3.2	-1.1%	£5.8
	Out-of-Centre:									
	Co-op, The Stennack	£2.2	£0.0	£0.5	£2.7	0%	£0.0	£2.7	-0.5%	£1.3
	Tesco, St Ives Road	£11.5	£0.0	£4.9	£16.4	7%	-£1.1	£15.3	-6.8%	£16.6
ZONE 1:	**PENZANCE / NEWLYN**									
	Out-of-Centre:									
	Tesco, Branwell Lane	£3.4	£19.7	£12.4	£35.5	13%	-£2.1	£33.3	-6.1%	£23.8
	Morrisons, Business Park	£5.1	£18.7	£12.8	£36.7	18%	-£3.1	£33.6	-8.4%	£24.7
	Lidl / Co-op	£0.0	£3.4	£0.5	£3.9	0%	£0.0	£3.9	-0.4%	£4.6
	Penzance Centre - All floorspace:	£0.3	£12.0	£3.1	£15.3	0%	£0.0	£15.3	0.0%	£13.6
	Newlyn Centre - All floorspace:	£0.0	£2.9	£0.7	£3.6	0%	£0.0	£3.6	0.0%	£1.6
OTHER MAJOR STORES ELSEWHERE:										
	Tesco Extra, Pool	£1.4	£5.4	£38.7	£45.5	4%	-£0.7	£44.9	-1.4%	£42.8
	Tesco, Camborne	£6.2	£25.0	£16.8	£48.1	19%	-£3.1	£45.0	-6.5%	£21.5
	Tesco, Helston	£0.4	£6.2	£37.4	£44.0	3%	-£0.5	£43.5	-1.1%	n/a
	Morrisons, Pool	£1.0	£4.5	£30.8	£36.2	3%	-£0.6	£35.7	-1.6%	£27.8
	All other shops & stores	£2.4	£17.7	£382.4	£402.5	13%	-£2.2	£400.3		
TOTAL:						**100%**	**-£16.8**			

NOTES:

Column 1: Derived from Table 11.
Column 2: Derived from Table 11.
Column 3: Derived from Table 11.
Column 4: Derived from Table 11. (sum of columns 1-3).
Column 5: Proportion of total turnover of proposed retail scheme drawn from major foodstores and shopping facilities. Where total turnover of proposed retail floorspace = 100%.
Column 6: Estimated monetary trade diversion to proposed retail scheme (derived from Table 12).
Column 7: Forecast residual turnover of all major centres and shopping facilities at the design year 'after' the proposed new retail floorspace.
Column 8: Forecast impact of the proposed retail floorspace on all major stores, centres and shopping facilities at the design year. (i.e. Col.6 divided by Col.4)
Column 9: 'Benchmark' turnover at 2015 derived from Table 4. This shows whether existing stores and centres are trading above or below their forecast 'benchmark' turnovers based on company averages "after" the development of the proposed retail floorspace.

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SOUTH QUAY - HAYLE: FOODSTORE PROPOSAL
Convenience Goods Impact Assessment

SCENARIO 2: HIGH TURNOVER ASSUMPTION

TABLE 14: 2015: IMPACT ASSESSMENT - SUMMARY TABLE

see notes:	1	2	3	4	5	6	7	8	9
	2015: 'Potential' Turnover				Trade Draw & Diversion		2015: Turnover ('after')	2015: Impact	2015: Benchmark Turnover
	Draw from Zones 2/3	Draw from 'ROSA'	Draw from Elsewhere	Total Turnover	%	£m	£m	%	£m
SOUTH QUAY - FOODSTORE:	-	-	-	-	-	**£21.8**	**£21.8**		
Hayle Town Centre:									
Co-Op, Copperhouse:	£8.1	£0.3	£0.9	£9.4	10%	-£2.3	£7.1	-24.1%	£5.3
Other Convenience Stores:	£1.8	£0.4	£0.1	£2.3	1%	-£0.3	£2.1	-10.9%	£1.9
TOTAL:	**£10.0**	**£0.7**	**£1.1**	**£11.7**	**12%**	**-£2.5**	**£9.2**	**-21.4%**	**£7.1**
Hayle Out-of-Centre:									
Lidl	£3.4	£0.3	£0.7	£4.4	7%	-£1.5	£2.9	-33.6%	£3.4
Marks & Spencer	£0.7	£0.6	£0.9	£2.2	2%	-£0.4	£1.8	-17.7%	£5.2
TOTAL:	**£4.1**	**£1.0**	**£1.6**	**£6.6**	**9%**	**-£1.9**	**£4.8**	**-28.2%**	**£8.6**
ZONE 2: ST IVES / CARBIS BAY									
All Town Centre Floorspace:	£2.8	£0.0	£0.4	£3.3	0%	£0.0	£3.2	-1.4%	£5.8
Out-of-Centre:									
Co-op, The Stennack	£2.2	£0.0	£0.5	£2.7	0%	£0.0	£2.7	-0.6%	£1.3
Tesco, St Ives Road	£11.5	£0.0	£4.9	£16.4	7%	-£1.4	£14.9	-8.8%	£16.6
ZONE 1: PENZANCE / NEWLYN									
Out-of-Centre:									
Tesco, Branwell Lane	£3.4	£19.7	£12.4	£35.5	13%	-£2.8	£32.7	-7.9%	£23.8
Morrisons, Business Park	£5.1	£18.7	£12.8	£36.7	18%	-£4.0	£32.7	-10.9%	£24.7
Lidl / Co-op	£0.0	£3.4	£0.5	£3.9	0%	£0.0	£3.9	-0.6%	£4.6
Penzance Centre - All floorspace:	£0.3	£12.0	£3.1	£15.3	0%	£0.0	£15.3	0.0%	£13.6
Newlyn Centre - All floorspace:	£0.0	£2.9	£0.7	£3.6	0%	£0.0	£3.6	0.0%	£1.6
OTHER MAJOR STORES ELSEWHERE:									
Tesco Extra, Pool	£1.4	£5.4	£38.7	£45.5	4%	-£0.8	£44.7	-1.9%	£42.8
Tesco, Camborne	£6.2	£25.0	£16.8	£48.1	19%	-£4.1	£44.0	-8.5%	£21.5
Tesco, Helston	£0.4	£6.2	£37.4	£44.0	3%	-£0.6	£43.4	-1.4%	n/a
Morrisons, Pool	£1.0	£4.5	£30.8	£36.2	3%	-£0.7	£35.5	-2.1%	£27.8
All other shops & stores	£2.4	£17.7	£382.4	£402.5	13%	-£2.8	£399.7		
TOTAL:					**100%**	**-£21.8**			

APPENDIX 8: COMPARISON GOODS IMPACT ASSESSMENT

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ING REAL ESTATE DEVELOPMENT

FOUNDRY YARD & SOUTH QUAY - HAYLE: RETAIL PROPOSAL

Comparison Goods Impact Assessment

TABLE 1: 'BASE YEAR' POPULATION & PROJECTIONS (2010 - 2015)

ZONES:	GEOGRAPHIC AREA:	2010	2011	2012	2013	2014	2015	GROWTH: 2010 - 15
Zone 1:	PENZANCE	34,900	35,214	35,518	35,805	36,153	36,364	4.2%
Zone 2:	ST IVES	12,729	12,769	12,872	12,971	13,054	13,127	3.1%
Zone 3:	HAYLE	14,285	14,410	14,597	14,785	14,925	15,066	5.5%
	MARAZION / BREAGE	11,929	11,955	12,017	12,098	12,178	12,244	2.6%
Zone 6:	CAMBORNE	25,973	26,255	26,544	26,904	27,160	27,444	5.7%
TOTAL:		**99,816**	**100,603**	**101,548**	**102,563**	**103,470**	**104,245**	**4.4%**
Zones 2 & 3:	**'PRIMARY' CATCHMENT AREA (PCA):**	**38,943**	**39,134**	**39,486**	**39,854**	**40,157**	**40,437**	**3.8%**
Zones 1 & 6:	**REST OF STUDY AREA (ROSA):**	**60,873**	**61,469**	**62,062**	**62,709**	**63,313**	**63,808**	**4.8%**

SOURCES: The survey zones are based on the 2010 *Cornwall Retail Study* (the study had not been published at the time of finalising our analysis).

The 2010 population estimates and projections to 2015 have been informed by Experian Business Strategies (EBS) *'Retail Area Planner Reports'*.

NOTES: Zone 1 comprises Zones 1 & 6 of the 2007 *Penwith Retail Study* (2007 PRS) & Zone 3 covers Zones 3 & 4 of the 2007 PRS.

The population projections do not take account of policy-led residential allocations, or the population increase that will arise from the new residential units proposed as part of the South Quay application. This will result in additional population growth over and above the assumed projections.

TABLE 2: COMPARISON GOODS EXPENDITURE PER CAPITA (2010 - 2015). Excludes Expenditure on Special Forms of Trading (SFT)

ZONES:	GEOGRAPHIC AREA:	2010	2011	2012	2013	2014	2015
Zone 1:	PENZANCE	£2,729	£2,739	£2,792	£2,858	£2,929	£3,004
Zone 2:	ST IVES	£2,653	£2,662	£2,714	£2,778	£2,848	£2,920
Zone 3:	HAYLE	£2,617	£2,626	£2,677	£2,741	£2,809	£2,881
	MARAZION / BREAGE	£2,852	£2,862	£2,918	£2,987	£3,061	£3,140
Zone 6:	CAMBORNE	£2,485	£2,493	£2,542	£2,602	£2,667	£2,735

SOURCES: Base year (2010) average spend per capita estimates are derived from the Experian *Retail Area Planner Reports* (March 2010). All monetary figures are expressed in 2008 price base and are inclusive of VAT.

Expenditure growth forecasts have been informed by the latest Experian Business Strategies (EBS) *Retail Planner Briefing Note 8.1 - Update* (August 2009: Figure 1). Assume annual growth rates of +0.4% for 2010; +1.2% for 2011; +2.4% for 2012; and +2.7% for 2013 to 2015. Please note that the EBS forecasts are significantly lower than the 'ultra' long-term trend projection of +4.7% per annum based on average growth between 1968 and 2008.

Allowance for Special Forms of Trading informed by EBS *Retail Planning Briefing Note 8.1* (Appendix 3). Assume SFT accounts for circa 9% of total spend per capita at 2010, increasing to over 11% by 2015.

TABLE 3: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE, 2010 - 2015 (£ million)

ZONES:	GEOGRAPHIC AREA:	2010	2011	2012	2013	2014	2015	GROWTH: £ m	GROWTH: %
Zone 1:	PENZANCE	£95.2	£96.4	£99.2	£102.3	£105.9	£109.2	£14.0	14.7%
Zone 2:	ST IVES	£33.8	£34.0	£34.9	£36.0	£37.2	£38.3	£4.6	13.5%
Zone 3:	HAYLE	£37.4	£37.8	£39.1	£40.5	£41.9	£43.4	£6.0	16.1%
	MARAZION / BREAGE	£34.0	£34.2	£35.1	£36.1	£37.3	£38.4	£4.4	13.0%
Zone 6:	CAMBORNE	£64.5	£65.5	£67.5	£70.0	£72.4	£75.1	£10.5	16.3%
TOTAL:		**£264.9**	**£268.0**	**£275.7**	**£285.0**	**£294.7**	**£304.5**	**£39.5**	**14.9%**
Zones 2 & 3:	**'PRIMARY' CATCHMENT AREA (PCA):**	**£105.2**	**£106.1**	**£109.1**	**£112.7**	**£116.4**	**£120.2**	**£15.0**	**14.3%**
Zones 1 & 6:	**REST OF STUDY AREA (ROSA):**	**£159.8**	**£161.9**	**£166.6**	**£172.3**	**£178.3**	**£184.3**	**£24.5**	**14.4%**

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FOUNDRY YARD & SOUTH QUAY - HAYLE: RETAIL PROPOSAL

Comparison Goods Impact Assessment

TABLE 4: EXISTING RETAIL FLOORSPACE AND 'BENCHMARK' TURNOVERS (@2008 prices)

		SOURCES & NOTES: 1	2	3	4	5	6
		Sales Area	**Non-Food Sales Area**		**Sales Density**	**2010 Turnover**	**2015 Turnover**
Food Store:	**Address:**	sq m net	%	m^2 net	£ / m^2	£ m	£ m
HAYLE TOWN CENTRE							
All town centre floorspace:		1,750	100%	1,750	£2,250	£3.9	£4.2
HAYLE: OUT-OF-CENTRE							
Boots	West Cornwall Retail Park	856	100%	856	£4,000	£3.4	£3.6
Next	West Cornwall Retail Park	1,303	100%	1,303	£4,500	£5.9	£6.2
M&S	West Cornwall Retail Park	1,580	71%	1,115	£6,500	£7.2	£7.7
Lidl	Carwin Rise	1,407	20%	281	£3,500	£1.0	£1.0
ST IVES / CARBIS BAY:							
All town centre floorspace:		5,030	100%	5,030	£2,500	£12.6	£13.3
Tesco - St Ives Rd, Carbis Bay:		1,578	20%	316	£9,000	£2.8	£3.1
PENZANCE:							
All town centre floorspace:		17,927	100%	17,927	£5,500	£98.6	£104.7
All retail warehouse floorspace:		4,262	100%	4,262	£2,500	£10.3	£11.1
All non-food superstore floorspace:		5,666	19%	1,096	£6,935	£7.6	£8.2
CAMBORNE / POOL:							
All town centre floorspace:		10,921	100%	10,921	£4,500	£49.1	£52.2
All retail warehouse floorspace:		10,041	100%	10,041	£2,050	£20.7	£22.3
All non-food superstore floorspace:		11,234	35%	3,961	£6,750	£26.7	£28.4

SOURCES & NOTES:

(1) Total comparison goods sales areas for Hayle, St Ives and Penzance informed by *Penwith Retail Study* (2007) - Appendix D (Tables14 & 14D). Non food sales area of foodstores in Camborne informed by *2008* Kerrier Retail Study. Total comparison goods floorspace of Camborne town centre informed Experian Goad Category Centre Report and out-of-centre retail warehouse sales areas informed by *Trevor Wood Retail & Leisure Parks Dataset*.

(2) Estimates of food / non-food sales area ratios informed by *Penwith Retail Study* (2007), *Kerrier Retail Study* (2008) and SP judgements based on health check assessment and audits.

(3) Estimates of comparison goods sales areas derived from food / non food sales ratio.

(4) The 'benchmark' company average sales densities have been informed by the *Penwith Retail Study* (2007). Sales estimates have been updated to take account of the latest published figures by Verdict and Mintel (*'UK Retail Rankings'*) and our own estimates of the trading performance of centres and stores based on the health check assessments / audits and the impact of the economic recession on sales performance levels.

(5) 2010 'benchmark' turnovers derived by applying the estimated average sales densities (4) to the comparison goods sales areas (3).

(6) 2015 'benchmark' turnovers derived by applying annual 'productivity' growth rate (informed by latest forecasts by Experian Business Strategies) of +0.5% for 2011; +1.0% for 2012; and +1.5% for 2013 to 2015.

TABLE 5a: SCENARIO 1: PROPOSED NON-FOOD FLOORSPACE - SALES AREA & TURNOVER FORECASTS (@2008 prices)

		NOTES: 1	2	3	4	5	6
		Sales Area	**Non-Food Sales Area**		**Sales Density**	**2010 Turnover**	**2015 Turnover**
Food Store:	**Address:**	sq m net	%	m^2 net	£ / m^2	£ m	£ m
South Quay - Foodstore		2,550	35%	893	£6,000	£5.36	£5.68
South Quay - Ancillary Retail Units		-	-	-	-	-	-
Foundry Site - Retail Units		1,256	100%	1,256	£2,250	£2.83	£3.00
	TOTAL:	**3,806**		**2,149**	**£3,808**	**£8.18**	**£8.68**

NOTES:

(1) Under Scenario 1 it is assumed that the ancillary units proposed for South Quay will be occupied by Class A3/A4 operators.

(1) The 3 proposed (Class A1) retail units on Foundry will have a total estimated gross floorspace of 1,993m^2 (including all mezzanine space). The total estimated retail sales area of the proposed scheme is based on an overall net/gross ratio of 68%.

(2) Assumed that 35% of the proposed foodstore's total sales area will be set aside for non-food retailing.

(4) The average sales densities assumed for all the different non-food floorspace have been informed by a variety of different sources including, *inter alia*, the *Penwith Retail Study* (2007); published research by Verdict & Mintel; and our judgement as to the potential sales performance of the different scale and format of proposed retail floorspace.

(4) Under Scenario 1 it is assumed that the non-food retail units proposed for Foundry will be occupied by large format 'bulky' goods retailers (i.e. DIY, furniture, carpets, floor coverings/tiles, etc.).

TABLE 5b: SCENARIO 2: PROPOSED NON-FOOD FLOORSPACE - SALES AREA & TURNOVER FORECASTS (@2008 prices)

		NOTES: 1	2	3	4	£5.00	6
		Sales Area	**Non-Food Sales Area**		**Sales Density**	**2010 Turnover**	**2015 Turnover**
Food Store:	**Address:**	m^2 net	%	m^2 net	£ / m^2	£ m	£ m
South Quay - Foodstore		2,550	35%	893	£9,000	£8.03	£8.53
South Quay - Ancillary Retail Units		264	100%	264	£3,000	£0.79	£0.84
Foundry Site - Retail Units		1,256	100%	1,256	£4,500	£5.65	£6.00
	TOTAL:	**4,071**		**2,413**	**£6,000**	**£14.48**	**£15.37**

NOTES:

(1) Under Scenario 2 it is assumed that the ancillary units proposed for South Quay will be occupied by non-food retailers.

(4) Under Scenario 2 it is assumed that the non-food retail units proposed for Foundry will be occupied by a mix of large format retailers and not just 'bulky' goods retailing.

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TABLE 6: 2010 MARKET SHARE ANALYSIS (%)

		ZONE 1	ZONE 2	ZONE 3	ZONE 6
ZONE 3:	**HAYLE**				
	Town Centre:	1.5%	3.3%	9.4%	2.5%
	Out-of-Centre Retail Warehouses:				
	Boots - West Cornwall RP	0.0%	0.0%	0.5%	0.0%
	Next - West Cornwall RP	0.0%	0.5%	0.0%	0.0%
	M&S - West Cornwall RP	0.2%	0.5%	0.3%	0.0%
	HAYLE MARKET SHARE:	**1.6%**	**4.3%**	**10.2%**	**2.5%**
ZONE 2:	**ST IVES / CARBIS BAY**				
	Town Centre	0.1%	15.2%	0.0%	0.0%
ZONE 1:	**PENZANCE:**				
	Town Centre:	76.8%	31.5%	30.2%	1.5%
	Out-of-Centre Retail Warehouses:	7.9%	2.2%	5.5%	0.0%
ZONE 6:	**CAMBORNE:**				
	Town Centre	0.0%	5.6%	11.6%	36.6%
	Out-of-Centre Retail Warehouses:	0.4%	2.2%	9.4%	9.6%
ZONE 10:	**TRURO**				
	Town Centre:	10.5%	28.8%	23.1%	27.9%
	Out-of-Centre Retail Warehouses:	0.1%	0.6%	1.3%	0.7%
	All other shops & stores:	2.4%	9.7%	8.7%	21.1%
TOTAL:		**100.0%**	**100.0%**	**100.0%**	**100.0%**

Notes: (1) The survey zones are based on the 2010 *Cornwall Retail Study* (the study had not published at the time of our analysis). Zone 1 comprises Zones 1 & 6 of the 2007 *Penwith Retail Study*; Zone 3 covers Zones 3 & 4 of the 2007 PRS.

TABLE 7: 2010 MARKET SHARE ANALYSIS (£m)

		ZONE 1	ZONE 2	ZONE 3	ZONE 6	TOTAL:	HAYLE: PCA
	Total Available Expenditure:	£95.2	£33.8	£71.4	£64.5	£264.9	£105.2
ZONE 3 + 4:	**HAYLE**						
	Town Centre:	£1.41	£1.11	£6.69	£1.60	£10.80	£7.80
	Out-of-Centre Retail Warehouses:						
	Boots - West Cornwall RP	£0.00	£0.00	£0.32	£0.00	£0.32	£0.32
	Next - West Cornwall RP	£0.00	£0.17	£0.00	£0.00	£0.17	£0.17
	M&S - West Cornwall RP	£0.16	£0.17	£0.24	£0.00	£0.57	£0.41
	HAYLE MARKET SHARE:	**£1.57**	**£1.45**	**£7.26**	**£1.60**	**£11.87**	**£8.71**
ZONE 2:	**ST IVES / CARBIS BAY**						
	Town Centre	£0.14	£5.13	£0.03	£0.00	£5.30	£5.16
ZONE 1:	**PENZANCE**						
	Town Centre:	£73.19	£10.64	£21.54	£1.00	£106.37	£32.19
	Out-of-Centre Retail Warehouses:	£7.56	£0.74	£3.93	£0.00	£12.22	£4.67
	CAMBORNE / POOL						
	Town Centre	£0.04	£1.89	£8.31	£23.65	£33.89	£10.20
	Out-of-Centre Retail Warehouses:	£0.36	£0.74	£6.68	£6.23	£14.00	£7.42
	TRURO						
	Town Centre:	£10.01	£9.72	£16.47	£18.00	£54.20	£26.19
	Out-of-Centre Retail Warehouses:	£0.14	£0.19	£0.94	£0.43	£1.70	£1.13
	All other shops & stores:	£2.25	£3.27	£6.24	£13.64	£25.39	£9.51
TOTAL:		**£95.2**	**£33.8**	**£71.4**	**£64.5**	**£264.9**	**£105.2**

ING REAL ESTATE DEVELOPMENT

FOUNDRY YARD & SOUTH QUAY - HAYLE: RETAIL PROPOSAL

Comparison Goods Impact Assessment

SCENARIO 1

TABLE 8: 2015 COMPARISON GOODS: REVISED MARKET SHARE & TRADE DRAW ANALYSIS - 'BEFORE' DEVELOPMENT PROPOSALS

		ZONE 1		ZONE 2		ZONE 3		ZONE 6		Trade Draw from Outside Study Area		TOTAL:
	Total Available Expenditure:		£109.2		£38.3		£81.8		£75.1			
		%	£m	%	£m	%	£m	%	£m	%	£m	£m
ZONE 3:	**HAYLE**											
	Town Centre:	1.5%	£1.61	3.3%	£1.26	9.4%	£7.67	2.5%	£1.86	15%	£2.2	£14.6
	Out-of-Centre Retail Warehouses	0.2%	£0.19	1.0%	£0.38	0.8%	£0.65	0.0%	£0.00	55%	£1.5	£2.7
	HAYLE MARKET SHARE:	**1.6%**	**£1.80**	**4.3%**	**£1.64**	**10.2%**	**£8.32**	**2.5%**	**£1.86**		**£3.7**	**£17.3**
ZONE 2:	**ST IVES / CARBIS BAY**											
	Town Centre	0.1%	£0.16	15.2%	£5.83	0.0%	£0.04	0.0%	£0.00	55%	£7.4	£13.4
ZONE 1:	**PENZANCE:**											
	Town Centre:	76.8%	£83.95	31.5%	£12.08	30.2%	£24.69	1.5%	£1.16	30%	£52.2	£174.1
	Out-of-Centre Retail Warehouses	7.9%	£8.67	2.2%	£0.84	5.5%	£4.50	0.0%	£0.00	25%	£4.7	£18.7
ZONE 6:	**CAMBORNE:**											
	Town Centre	0.0%	£0.05	5.6%	£2.15	11.6%	£9.52	36.6%	£27.51	50%	£39.2	£78.4
	Out-of-Centre Retail Warehouses	0.4%	£0.41	2.2%	£0.84	9.4%	£7.66	9.6%	£7.24	50%	£16.1	£32.3
ZONE 10:	**TRURO**											
	Town Centre:	10.5%	£11.48	28.8%	£11.04	23.1%	£18.87	27.9%	£20.94	75%	£187.0	£249.3
	Out-of-Centre Retail Warehouses	0.1%	£0.16	0.6%	£0.22	1.3%	£1.08	0.7%	£0.50	90%	£17.6	£19.5
ALL OTHER SHOPS & STORES:		2.4%	£2.58	9.7%	£3.71	8.7%	£7.16	21.1%	£15.86	95%	£556.8	£586.1
TOTAL:		**100%**	**£109.2**	**100%**	**£38.3**	**100%**	**£81.8**	**100%**	**£75.1**		**-**	**£1,189**

TABLE 9: 2015 COMPARISON GOODS: REVISED MARKET SHARE & TRADE DRAW ANALYSIS - 'AFTER' DEVELOPMENT PROPOSALS

		ZONE 1		ZONE 2		ZONE 3		ZONE 6		Trade Draw from Outside Study Area		TOTAL:
	Total Available Expenditure:		£109.2		£38.3		£81.8		£75.1			
		%	£m	%	£m	%	£m	%	£m	%	£m	£m
ZONE 3:												
	ING PROPOSAL:											
	Trade Draw:	5.0%		15.0%		62.0%		3.0%		15.0%		
	Market Share (% / £m):	0.4%	**£0.43**	3.4%	**£1.30**	6.6%	**£5.38**	0.3%	**£0.26**		**£1.30**	**£8.7**
ZONE 3:	HAYLE TOWN CENTRE:	1.4%	£1.57	3.2%	£1.21	9.1%	£7.48	2.4%	£1.81	15%	£2.1	£14.2
	Out-of-Centre Retail Warehouses	0.1%	£0.13	0.8%	£0.32	0.4%	£0.33	0.0%	£0.00	64%	£1.4	£2.1
	HAYLE MARKET SHARE:	**2.0%**	**£2.13**	**7.4%**	**£2.83**	**16.1%**	**£13.19**	**2.8%**	**£2.07**		**£4.8**	**£25.0**
ZONE 2:	**ST IVES / CARBIS BAY**											
	Town Centre	0.1%	£0.15	14.9%	£5.69	0.0%	£0.04	0.0%	£0.00	55%	£7.3	£13.2
ZONE 1:	**PENZANCE:**											
	Penzance Town Centre:	76.8%	£83.94	31.2%	£11.95	29.7%	£24.34	1.5%	£1.14	30%	£52.2	£173.6
	Out-of-Centre Retail Warehouses	7.9%	£8.58	1.8%	£0.68	4.2%	£3.45	0.0%	£0.00	27%	£4.6	£17.3
ZONE 6:	**CAMBORNE:**											
	Town Centre	0.0%	£0.03	5.3%	£2.04	11.4%	£9.33	36.6%	£27.50	50%	£39.2	£78.1
	Out-of-Centre Retail Warehouses	0.3%	£0.27	1.6%	£0.60	7.9%	£6.45	9.6%	£7.18	52%	£16.0	£30.5
ZONE 10:	**TRURO**											
	Town Centre:	10.5%	£11.47	28.4%	£10.88	22.8%	£18.69	27.9%	£20.93	75%	£187.0	£249.0
	Out-of-Centre Retail Warehouses	0.1%	£0.14	0.4%	£0.17	0.9%	£0.73	0.6%	£0.48	92%	£17.5	£19.0
ALL OTHER SHOPS & STORES:		2.3%	£2.52	9.1%	£3.50	6.9%	£5.62	21.0%	£15.77	95%	£556.1	£583.5
TOTAL:		**100%**	**£109.2**	**100%**	**£38.3**	**100%**	**£81.8**	**100%**	**£75.1**		**-**	**£1,189**

ING REAL ESTATE DEVELOPMENT

FOUNDRY YARD & SOUTH QUAY - HAYLE: RETAIL PROPOSAL

Comparison Goods Impact Assessment

SCENARIO 1: BASELINE TURNOVER

TABLE 10: 2015: IMPACT ASSESSMENT - SUMMARY TABLE

see notes:	1	2	3	4	5	6	7	8	9
	2015: 'Potential' Turnover				Trade Draw & Diversion		2015: Turnover ('after')	2015: Impact	2015: Benchmark Turnover
	Draw from PCA	Draw from 'ROSA'	Draw from Elsewhere	Total Turnover	%	£m	£m	%	£m
ZONE 1: HAYLE:									
ING PROPOSAL:	-	-	-	-	-	**£8.68**	**£8.7**		
Town Centre:	£8.93	£3.47	£2.19	£14.59	4%	-£0.39	£14.2	-2.6%	£4.2
Out-of-Centre Retail Warehouses:	£1.03	£0.19	£1.49	£2.71	7%	-£0.57	£2.1	-21.2%	£18.6
ZONE 2: ST IVES / CARBIS BAY									
Town Centre	£5.86	£0.2	£7.4	£13.4	2%	-£0.17	£13.2	-1.3%	£13.3
ZONE 1: PENZANCE									
Town Centre:	£36.78	£85.1	£52.2	£174.1	6%	-£0.54	£173.6	-0.3%	£104.7
Out-of-Centre Retail Warehouses:	£5.34	£8.7	£4.7	£18.7	16%	-£1.36	£17.3	-7.3%	£11.1
ZONE 6: CAMBORNE:									
Town Centre	£11.67	£27.6	£39.2	£78.4	4%	-£0.36	£78.1	-0.5%	£52.2
Out-of-Centre Retail Warehouses:	£8.50	£7.7	£16.1	£32.3	20%	-£1.78	£30.5	-5.5%	£22.3
ZONE 10: TRURO									
Town Centre:	£29.91	£32.4	£187.0	£249.3	4%	-£0.36	£249.0	-0.1%	n/a
Out-of-Centre Retail Warehouses:	£1.29	£0.7	£17.6	£19.5	6%	-£0.52	£19.0	-2.6%	n/a
ALL OTHER SHOPS & STORES:	£10.87	£18.4	£556.8	£586.1	30%	-£2.64	£583.5	-	-
TOTAL:					**100%**	**-£8.68**			

NOTES:

Column 1: Derived from Table 8.

Column 2: Derived from Table 8.

Column 3: Derived from Table 8.

Column 4: Derived from Table 8. (sum of columns 1-3).

Column 5: Proportion of total turnover of proposed retail scheme drawn from major foodstores and shopping facilities. Where total turnover of proposed retail floorspace = 100%

Column 6: Estimated monetary trade diversion to proposed retail scheme (derived from Table 9).

Column 7: Forecast residual turnover of all major centres and shopping facilities at the design year 'after' the proposed new retail floorspace.

Column 8: Forecast impact of the proposed retail floorspace on all major stores, centres and shopping facilities at the design year. (i.e. Col.6 divided by Col.4)

Column 9: 'Benchmark' turnover at 2015 derived from Table 4. This shows whether existing centres and stores are trading above or below their forecast 'benchmark' turnovers based on company averages "after" the development of the proposed retail floorspace.

ING REAL ESTATE DEVELOPMENT

FOUNDRY YARD & SOUTH QUAY - HAYLE: RETAIL PROPOSAL

Comparison Goods Impact Assessment

SCENARIO 2: HIGH TURNOVER ASSUMPTION

TABLE 11: 2015: IMPACT ASSESSMENT - SUMMARY TABLE

	see notes:	1	2	3	4	5	6	7	8	9
		2015: 'Potential' Turnover				Trade Draw & Diversion		2015: Turnover ('after')	2015: Impact	2015: Benchmark Turnover
		Draw from PCA	Draw from 'ROSA'	Draw from Elsewhere	Total Turnover	%	£m	£m	%	£m
ZONE 1: HAYLE:										
	ING PROPOSAL:	-	-	-	-	-	**£15.37**	**£15.4**		
	Town Centre:	£8.93	£3.47	£2.19	£14.59	4%	-£0.68	£13.9	-4.7%	£4.2
	Out-of-Centre Retail Warehouses:	£1.03	£0.19	£1.49	£2.71	7%	-£1.02	£1.7	-37.6%	£18.6
ZONE 2:	**ST IVES / CARBIS BAY**									
	Town Centre	£5.86	£0.16	£7.36	£13.38	2%	-£0.31	£13.1	-2.3%	£13.3
ZONE 1:	**PENZANCE**									
	Town Centre:	£36.78	£85.11	£52.24	£174.12	6%	-£0.96	£173.2	-0.5%	£104.7
	Out-of-Centre Retail Warehouses:	£5.34	£8.67	£4.67	£18.67	16%	-£2.40	£16.3	-12.9%	£11.1
ZONE 6:	**CAMBORNE:**									
	Town Centre	£11.67	£27.55	£39.22	£78.44	4%	-£0.63	£77.8	-0.8%	£52.2
	Out-of-Centre Retail Warehouses:	£8.50	£7.65	£16.15	£32.30	20%	-£3.14	£29.2	-9.7%	£22.3
ZONE 10:	**TRURO**									
	Town Centre:	£29.91	£32.42	£186.99	£249.32	4%	-£0.64	£248.7	-0.3%	n/a
	Out-of-Centre Retail Warehouses:	£1.29	£0.66	£17.55	£19.50	6%	-£0.91	£18.6	-4.7%	n/a
ALL OTHER SHOPS & STORES:		£10.87	£18.44	£556.80	£586.11	30%	-£4.67	£581.4	-	-
TOTAL:						**100%**	**-£15.37**			