

Langarth Garden Village Retail Impact Assessment

Cornwall Council

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1.0 Introduction

1.1 This Retail Sequential and Impact Assessment has been prepared by Lichfields on behalf of the applicant, Cornwall Council. It accompanies an outline planning application seeking planning permission for a new garden community to be known as 'Langarth Garden Village' at Threemilestone to the west of Truro city centre.

1.2 The description of development is as follows:

Hybrid planning application for Langarth Garden Village comprising;

A. A full planning application for construction of the Northern Access Road and associated access junction arrangements onto the A390, new junctions to the quiet lanes and associated infrastructure and earthworks and retaining and boundary features.

B. An outline planning application with all matters reserved to create a mixed use, landscaped community comprising a phased development of up to 3,550 dwellings plus 200 extra care units and 50 units of student/health worker accommodation, including affordable housing; five local centres comprising local retail (E), offices (E), restaurants and cafes (E), drinking establishments (sui generis), hot food takeaway (sui generis), health and community facilities (F1 and E), a local care health centre (E), a blue light centre for emergency services (sui generis), up to two primary schools (F1), business and commercial floorspace (E), brewery / public house (sui generis) and associated areas of open space to include a suitable alternative natural greenspace as a strategic open space a community farm/allotments, public realm, renewable energy provision and energy centre, park and ride extension (of up to 600 spaces or 2.73 ha), cycle lanes, connections with the existing highway network including crossings of the A390, quiet lanes, drainage and associated infrastructure, including the demolition of buildings and structures, site clearance and associated earthworks.

1.3 This assessment should be read in conjunction with the planning application submission.

1.4 The purpose of this assessment is to identify the key town centre and retail planning considerations associated with the commercial elements of the proposed development. This report assesses the scheme in the context of relevant planning policies and national guidance.

1.5 This report consists of the following sections:

- Section 2.0 describes the scheme proposals in detail, including a breakdown of the proposed commercial uses and floorspace;
- Section 3.0 provides a summary of the relevant national, strategic and local retail planning policy;
- Section 5.0 provides a health check assessment of the Truro city centre as the nearest existing defined centre within the vicinity of the application site
- Section 6.0 assesses the proposals in terms of compliance with the sequential approach;
- Section 7.0 considers the impacts associated with the retail element of the proposed scheme; and
- Section 8.0 draws conclusions.

2.0 Proposed Development

- 2.1 The garden village site is circa 117 hectares and proposes a mix of uses across the site.
- 2.2 The development will be residential led, with circa 3,550 dwellings plus 200 extra care units and 50 units of student/health worker accommodation, including affordable housing. There are also extensive areas of green infrastructure including areas for play as well as education and health facilities proposed.
- 2.3 In terms of the proposed commercial uses, five local centres are will be provided across the site. A sports and wellness quarter is also proposed adjacent to the new Stadium as well as community uses and office space.
- 2.4 The proposed main town centre uses can be broken down as follows:

Table 2.1 Proposed Main Town Centre Uses

Proposed Uses	Proposed Gross Internal Area (sq. m)
Convenience Goods Retail (Class E)	2,060 sq. m (1,450 sq. m net sales)
Comparison Goods Retail (Class E)	1,500 sq. m (1,200 sq. m net sales)
Financial / Professional services (Class E)	500 sq. m
Food and beverage (Class E)	1,540 sq. m
Micro-Brewery (Sui generis)	1,500 sq. m
Office / Employment uses (Class E)	15,500 sq. m
Health /Community / Education uses (Class E / F1)	13,430 sq. m
Other leisure uses (Class E / F2)	2,500 sq. m
TOTAL	38,530 sq. m

- 2.5 Further details of the proposed development can be found in the Planning Statement, Design and Access Statement and Environmental Impact Assessment submitted with the application.
- 2.6 In this regard, the EIA technical work was completed before the Use Classes Order (UCO) changes were announced and came into effect on 1 September 2020. However, this report seeks to consider the proposed floorspace with regard to the updated UCO. The uses assessed reflect the applicant's land use intentions vis a vis a masterplan which protects city centre vitality and secures a range of uses for a self-sustaining community. The applicant will work proactively with the LPA to ensure these land use objectives are realised through the effective use of planning conditions.

Retail Planning History

- 2.7 A number of planning applications have been approved across the site which have included retail and leisure floorspace. However, in order to avoid duplication of uses, this new planning application has been submitted which seeks to deliver a comprehensive and cohesive vision across the entire site.
- 2.8 Retail / leisure developments which have gained planning permission to date within the masterplan red line area are shown in Table 2.2 overleaf, noting that these reference the previous UCO.
- 2.9 In addition to those listed in Table 2.2, the 'Hendra' site which is located to the east of the application site adjacent to the Maiden Green parcel, also benefits from extant consent for 5,322 sqm net of A1 retail floor space and a community hub to include A1, A3 and A4, office space, leisure and community space (app refs: PA14/09345 and PA18/00474). An application to

change the nature and increase the amount of retail floorspace at the site was refused in March 2020 (app ref: PA19/05930).

- 2.10 The applicant sought to replace the proposed 'community hub' with two restaurant units, change a previously proposed A3/A4 unit to A1 and to increase A1 floorspace throughout the scheme. The applicant stated that the floorspace changes were to meet the requirements of the specific identified operators which were to include Aldi, Next, Wren Kitchens, Go Outdoors, Smyths Toys, Boots and Shoezone. This tenant list indicates that the nature of retail proposed has moved more towards a retail warehouse park format rather than a new centre serving local needs emerging from new residential development. Following the refusal, it is not known whether the fall-back position remains viable, whether the applicant will appeal or whether a new scheme will be submitted. However, it is noted that a 'community hub' in this peripheral location wouldn't adequately serve the new Garden Village.

Table 2.2 Committed Development in Threemilestone

	A1 Food store	A1 Non Food	Food & Beverage (A3/A4/A5)	Leisure / Commercial Uses	Employment including Offices
Maiden Green Farm	6,828 sq. m gross / 3,958 sq. m net food store (2,980 sq. m convenience / 978 sq. m comparison) 130 sq. m gross (120 sq. m net) convenience store – assume 95:5 conv/comp split.	2,600 sq. m gross / 1,995 sq. m net	935 sq. m gross	1,221 sqm Children's play centre	6,605 sq. m
Willow Green	4,715 sq. m net Asda Foodstore (2,800 sq. m convenience / 1,915 sq. m comparison)		800 sq. m gross		
Langarth Farm	1,120 sq. m gross convenience store / 840 sq. m net (assume 80:20 conv/comp split)		929 sq. m gross		

Sources: Maiden Farm – Approved Outline Quantum Parameter Plan LL-210-133, GVA Report February 2015 and application PA18/06918; Willow Green – Approved RMA Design & Access Statement and GVA Report February 2015; Hendra – Approved RMA Dec 2018, net food store floorspace based on 75:25 net to gross ratio, A1 non-food floorspace based on net to gross ratio of 80:20 and GVA Report February 2015; Langarth Farm – 2011 outline permission, net food store floorspace based on 75:25 net to gross ratio and GVA Report February 2015; West Langarth – 2014 outline planning application; Stadium – approved RMA application.

- 2.11 The stadium site, which is not included in this application, received reserved matters approval in January 2020 for the 10,000-person stadium, ancillary office and hospitality floorspace, hotel and infrastructure (app ref: PA19/05099).
- 2.12 It is also noted that the site known as West Langarth had a planning application approved in 2014 for up to 2,536 sq. m (net) of convenience floorspace, 4,803 sq. m (net) of comparison floorspace and 939 sq. m gross of food and beverage floorspace along with a community and sports facility. However, this permission has since lapsed.
- 2.13 In summary, the approved floorspaces against what is now proposed under this application can be summarised as follows:

Table 2.3 Permitted vs. Proposed Floorspace

	Permitted Floorspace	Proposed Floorspace (sq. m net)	Difference
A1 – Convenience Goods (now Class E)	6,064 sq. m net (8,600 sq. m net including West Langarth)	1,450 sq. m net	-4,614 sq. m net (-7,150 sq. m net including West Langarth)
A1 – Comparison Goods (now Class E)	5,567 sq. m net (10,370 sq. m net including West Langarth)	1,200 sq. m net	- 4,367 sq. m (-9,172 sq. m net including West Langarth)
A3 / A4 / A5 – Food and Beverage (now Class E / sui generis)	2,654 sq. m gross (3,593 sq. m gross including West Langarth)	3,040 sq. m gross	+ 386 sq. m gross (-552 sq. m including West Langarth)
Employment (including offices) (now Class E)	6,605 sq. m gross	15,500 sq. m gross	+8,895 sq. m
D2 - Leisure uses (now Class E / F2)	1,221 sq. m	2,500 sq. m	+1,279 sq. m

2.14

It is therefore noted, that even when including the Hendra development as currently approved (which includes for up to 4,317 sq. m gross of comparison floorspace and 1,300 sq. m gross of convenience floorspace), and excluding the now lapsed permission at West Langarth, total convenience and comparison retail floorspace in this location is proposed to be significantly less than previously approved, thus reducing the potential impact on Truro city centre.

3.0 Relevant Planning Policy

National Policy

- 3.1 A revised National Planning Policy Framework was published in February 2019. In relation to retail and town centre uses, the revised NPPF does not change the overall aims of policy. At the heart of the NPPF is a presumption in favour of sustainable development (para. 11). For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. Policies should set out an overall strategy for the pattern, scale and quality of development, and make sufficient provision for (para. 20) employment, retail, leisure, other commercial development and community facilities.
- 3.2 The NPPF (paragraph 92) identifies the need to plan positively for community facilities including local shops. In relation to large residential developments, paragraph 72 indicates that new homes can be provided within new settlements or significant extensions to existing villages, provided they are well located and designed, and supported by the necessary infrastructure and facilities. This objective requires sufficient access to services and employment opportunities within the development itself. The benefits of providing an appropriate mix of uses within large scale development in terms of sustainable transport (minimising the number and length of journeys) is highlighted (paragraph 104).
- 3.3 In terms of retail, planning policies and decisions should support the role that centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation. Planning policies should allocate a range of suitable sites to meet the scale and type of development likely to be needed. Meeting anticipated needs for retail, leisure, office and other main town centre uses should not be compromised by limited site availability. Where suitable and viable town centre and edge of centre sites are not available for main town centre uses, policies should explain how identified needs can be met in other accessible locations.
- 3.4 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will be assessed against NPPF policies and the key sequential and impact tests.

Sequential Test

- 3.5 The sequential approach test indicates main town centre uses should locate in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered (para. 86). When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge of centre sites are fully explored (para. 87).
- 3.6 The new retail centres proposed as part of the LGV development are considered to be 'out-of-centre'. However, as acknowledged by the National Planning Policy Guidance (NPPG), certain main town centre uses have particular market and locational requirements, which mean they may only be accommodated in specific locations. Robust evidence is required to demonstrate a locational specific requirement when applying the sequential test.
- 3.7 The NPPF and PPG provide limited guidance on the appropriate area of search for sequential sites, but it is widely accepted that sequential sites should serve the same or similar catchment area when compared with the application site.

- 3.8 The NPPF indicates that sequential sites should be capable of accommodating development proposals. The scope for flexibility needs to be considered. A proposed new retail centre(s) should not be disaggregated, either through the development plan process or a via a planning application. Sequentially preferable sites would need to be large enough to accommodate development of a broadly similar size.

Impact Assessment

- 3.9 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold.

- 3.10 For development not promoted through the development process, and where there is no locally set threshold, the default impact threshold is 2,500 sq. m (para. 89). An impact assessment should include:

- 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; and
- b the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).

- 3.11 Where an application fails to satisfy the sequential test, or is likely to have a significant adverse impact on one of more of the above factors, it should be refused (para. 90).

Local Development Plan

- 3.12 Policy 2A of the Cornwall Local Plan Strategic Policies (2010-2030) requires the delivery of a minimum of 52,500 homes to 2030 across Cornwall. Under this policy, the housing requirement is then broadly distributed by Community Network Area (CNA).

- 3.13 The LGV site is located within the Truro and Roseland CNA, which is to deliver circa 3,900 dwellings within 'Truro with Threemilestone' with a further 1,200 homes provided within the remainder of the CNA.

- 3.14 In terms of retail, the Truro and Roseland CNA section of the Local Plan states that:

- Truro is an important retail centre of strategic importance attracting a wide catchment from the surrounding rural towns and villages. Suitable land for larger retail development is in limited supply in the city centre; however, opportunities include the Council's former office campus at Pydar Street, the Moorfield car park and Garras Wharf; and
- Threemilestone village centre provides an important role for local residents and provides local services and shopping. There is considerable potential for the regeneration of the centre to provide additional facilities and services for residents and workers at local employment areas.

- 3.15 Cornwall Council adopted the Cornwall Site Allocations DPD in November 2019. However, this document does not include Truro. The SADPD states that the town wished to produce its own Neighbourhood Development Plans that would include allocations and / or policies to address how the Cornwall Local Plan Strategic Policies targets will be delivered.

Neighbourhood Plan

- 3.16 In December 2016, the Truro and Kenwyn Neighbourhood Plan 2015-2030 (TKNP) was adopted.
- 3.17 The TKNP states that in terms of housing, there are no allocations made within the plan as permissions have already been granted since 2010 for around 4,100 dwellings in Truro and Kenwyn.
- 3.18 In terms of retail, the TKNP also does not allocate retail sites stating that *“there is pressure for the development of out of town retail sites, but there remain deliverable brownfield sites within the city centre for redevelopment. Growth options may support a new food store to the west of the city, but the focus for non-food retail and leisure should be the city centre, where it can be accessed by a variety of means of transport and support other town centre businesses and uses”*.
- 3.19 In addition, the document states that *“Recent planning permissions at Langarth will create substantial new communities in the west of the Plan area. These areas should be able to access day to day shopping needs without having to access the city centre. In recognition of this the Retail Strategy for Cornwall recognises a potential need for one small supermarket in the west of Truro / Threemilestone area”*.
- 3.20 This position is reflected in Policy EJ2 which seeks to direct new retail development to the city centre in the first instance with development proposals for retail or city centre uses outside of the town centre boundary to be *“subject to sequential testing to demonstrate why the proposed use cannot be accommodated in the city centre and that they would not negatively impact on the trading and operation of the city centre”*.

Land North of the A390 Truro/Threemilestone Development Brief (Adopted 2012)

- 3.21 In January 2012, Cornwall Council adopted the above Development Brief which forms Supplementary Planning Guidance and is thus a material consideration.
- 3.22 The site area in the Development Brief is slightly smaller than is now being considered under this application, with additional land now included within the red line to the west (West Langarth) and to the north east (up to and including include Penventinnie Round).
- 3.23 The document splits the site into four areas as follows:
- 1 **Maiden Green:** circa 560 dwellings, 300 student/key worker units, 10,000 sq. m employment floorspace and a new district centre adjoining the existing hospital, education and associated uses incorporating a new Asda foodstore;
 - 2 **Willow Green:** circa 550 dwellings, 6,600 sq. m (gross) foodstore, 200 sq. m ancillary retail, 475 sq. m of employment, 50 sq. m for Community office, 700 sq. m health, vet surgery and nursery accommodation, 350 sq. m family restaurant, Petrol Filling Station and Primary school
 - 3 **Langarth Farm:** 10,000 seat stadium, 950 sq. m pub/restaurant, 60-bed hotel, 120-bed hotel, 400 sq. m convenience store, 1,064 sq. m health / community uses, retirement village, primary school, circa 7,860 sq. m employment floorspace and 1,500 dwellings; and
 - 4 **Other Land:** future development land - no specific development specified.

District Centre

- 3.24 The document states that there should only be one district centre with one medium sized food store. This should be sited in a suitably accessible location where it would also assist integration of the new community with Threemilestone. The document states that this should include:
- supermarket (consistent of findings of 2010 retail study);
 - doctor's surgery/health centre;
 - public house/restaurant;
 - children's nursery;
 - the laying out of a parking area to accommodate a mobile library unit; and
 - provision for a range of small business and services to complement the main uses in the District Centre.
- 3.25 The document refers to local centres although there is no guidance on the number required. In terms of the location, the document suggests locations adjacent to the A390 between Threemilestone Retail Park and Treliske Retail Park may be suitable.

Retail Evidence Base

- 3.26 The Council's advisors GVA undertook a county wide Retail Study in 2010 which was updated in 2015, including a new household survey (undertaken in 2014).
- 3.27 For Truro, the 2015 update stated that within the 2010 study, the quantitative need assessment found that there was surplus expenditure capacity equivalent to one new medium sized supermarket, with a total capacity level of circa 2,800 sq. m (net) by 2031.
- 3.28 However, in the 2015 update, GVA found that permission has been granted for a new Waitrose store and associated Taste of Cornwall store on the eastern side of the city. In addition, there is the potential for convenience goods floorspace to be provided within the mixed use development commitments at Langarth and a site adjacent to the Park and Ride facility in Threemilestone.
- 3.29 Therefore, taking account of these commitments, along with the other updated survey and expenditure information, GVA concluded that there was no current capacity for additional convenience goods floorspace in the Truro/Threemilestone area. However, GVA found that by 2024, there is capacity for 500 sq. m net, increasing to 1,400 sq. m at 2030. GVA confirmed in the 2015 update that Cornwall Council do not need to plan for another supermarket in the Truro/Threemilestone area.
- 3.30 In terms of comparison retail, GVA cited a number of new commitments for comparison goods floorspace in Truro/Threemilestone and in other settlements whose residents have historically contributed to Truro's turnover level. GVA stated that this had resulted in significant reduction in the amount of floorspace capacity available to new comparison goods floorspace and is a sign of the increasing pressure that the city centre is under from development in both the local area and further afield. GVA's figures demonstrated that, surplus capacity will only arise between 2019 and 2024 (circa 3,350 sq. m net), although in the longer term there is likely to be capacity for circa 14,000 sq. m (net) of new floorspace by 2030.

4.0 Truro City Centre Health Check

4.1 Truro is the only city in Cornwall and sits at the top of the retail hierarchy for the county. The Local Plan (para 1.77) states that *‘Proposals should support Truro’s wider role as an economic and service centre, and maintain its role at the top of the retail hierarchy and as an alternative to major centres outside of Cornwall’*.

4.2 Truro is the largest shopping centre in the county with many more retail units than any other Cornish centre. Its key roles are set out below:

- **Convenience** – within the centre, Truro has a Tesco superstore (circa 3,600 sq. m net) at Garras Wharf which is the largest convenience store serving in the town centre. This is supported by a Co-op (circa 600 sq. m net) at Boscawen Street. There is also an M&S foodhall within the main store and an edge of centre Iceland at Fairmantle Street. There are other convenience retailers in the centre including bakers, delicatessens, health food shops etc.
- **Comparison** – as a city centre, Truro has attracted a number of key national retailers including Marks & Spencer, Primark, Boots, Wilko, Topshop, TKMaxx, Fatface, Argos, Next, Lakeland, New Look etc. There is also a good mix of independent retailers including gift shops, clothes shops and sporting goods.
- **Services** – there is a wide range of non-retail services, including a barber, hairdressers, dry cleaner, estate agents, financial services, solicitors, travel agents, beauty services and banks.
- **Food and Beverage** – there are a mix of national chains and independent food and beverage retailers distributed throughout the centre including Pizza Express, Ask Italian, Café Nero, Cornish Vegan, Habeneros etc.
- **Entertainment/Leisure** – leisure opportunities are relatively limited in Truro although the centre benefits from the Plaza cinema and Truro Bowl. There are some local fitness centres including Anytime Fitness, The Yoga Centre and Breathe and a number of public houses / bars. ‘The Gym’ is also located edge of centre.
- **Other** – the Pannier Market is located within the centre along with other attractors such as Truro College, the Library, the Cathedral, Royal Cornwall Museum, Lemon Street Market, the Job Centre and several office buildings.

Mix of uses

4.3 In December 2019, Cornwall Council published a survey of the centre which has found that within Truro there are 25 Class A1 convenience outlets, 196 A1 comparison outlets, 190 units providing retail services and 70 vacant units. The diversity of Class A units within the centre is set out in Table 4.1 below, and the results are compared with the national average.

4.4 As can be seen from Table 4.1, the centre has a slightly higher vacancy rate than the national average, but the Goad plan shows these units are distributed throughout the centre. The largest concentration is at the Hall for Cornwall which was closed for renovation at the time of the survey. This area should be reoccupied when renovation is completed. The other concentration is around Pydar Street which is currently the subject of a live planning application for redevelopment. The current level of vacancy does not indicate the centre is in poor health in this instance.

Table.4.1 Truro City Centre - Mix of Class A uses

Type of Unit	No. of units	% of Units	% National Average
Class A1 - comparison	196	40.7	32.0
Class A1 - convenience	25	5.2	9.2
Class A1 – service	48	10.0	14.2
Class A2 - financial services	67	13.9	11.4
Class A3/A5 – restaurants/takeaways	63	13.1	16.0
Class A4 - pubs/bars	12	2.5	4.8
Vacant (Class A1-A5)	70	14.6	12.4
Total	481	100.0	100.0
Misc / sui generis service	12	n/a	
Non retail (D1, D2, B1a & SG)	73	n/a	
Total	566		

Source: Cornwall Council Survey 2019. Experian Goad 2019 national average.

- 4.5 The centre has a higher proportion of comparison units and a lower provision of convenience units when compared with the national average. However, Truro is adequately served by out of centre Sainsburys, Waitrose and Aldi stores. The higher percentage of comparison goods shops is a good indicator of health and the importance of Truro as a shopping centre at the top of the hierarchy.
- 4.6 Service uses are broadly in line with the national average and restaurants, takeaways, pubs and bars is slightly below. The city centre also caters for tourists and has a dual role serving local residents and visitors, which contributes to its vitality and viability.

Commercial Rents

- 4.7 Zone A rents are normally used to compare rental rents between centres and different locations within centres. Zone A is annual rental charge per square foot or metre for the first 20-foot depth of a shop unit, which is the most suitable measure for standardising and comparing rental levels. The Valuation Office Agency (VOA) rateable value information for 2017 suggests Zone A retail rents within Truro range between circa £700 per sq. m and £1,150 per sq. m.
- 4.8 This rental value is very similar to Plymouth, but lower than Exeter (circa £2,000 per sq. m) and is significantly higher than Falmouth (circa £230 - £590 per sq. m). Truro appears to command relatively high rents commensurate with its city status and position in the hierarchy.

Characteristics of the shopping area

- 4.9 The Council's monitoring report demonstrates the city centre covers a wide area, including 54 streets offering retail provision. However, the main shopping area is focussed around Pydar Street, King Street, Boscawen Street, St Nicholas Street, River Street and Lemon Quay.
- 4.10 The majority of the shopping area is focussed around traditional shopping streets with a number of attractive buildings and high quality public realm. There are also a number of 'quirky' buildings which add real interest to the street scene. To the south of the centre is Lemon Quay which is a purpose built, outdoor square with retail focused along one parade, with a multi storey car park serving the centre.
- 4.11 To the north of the centre is the northern end of Pydar Street which is predominantly vacant. An outline planning application was submitted in June 2020 for up to 320 dwellings, up to 400 student bed spaces, up to 21,000 sq. m of employment space including leisure, office, hotel,

community, small retail, education/innovation and food and beverage units. As such, this area should soon be regenerated.

4.12 The public realm and street furniture are good quality and are broadly consistent throughout the centre. A number of the streets are narrow making opportunities for street furniture more limited although there are several bins, benches, and public art and ample lighting in the centre, and there is CCTV present. It's understood that 'The Drummer' sculpture is temporarily located at the Eden Project while refurbishment works continue at the Hall for Cornwall (due to open summer 2020).

4.13 The centre is extensive and provides opportunities for visitors to explore which adds to its charm. There are several pedestrian zebra crossing points linking the car parking areas and shops. The distribution of key attractors in different parts of the city helps to ensure a good spread of footfall (i.e. M&S to the south and TK Maxx to the north). Throughout the centre paving is good quality and well maintained although due to the historic nature of the city, footpaths are often narrow.

Accessibility

4.14 There are plenty of options for car parking throughout the centre including at Lemon Quay (circa 395 spaces), Moorfield multi-storey (circa 680 spaces), Highcross (circa 450 spaces) and Garras Wharf (circa 335 spaces) and Viaduct (circa 340 spaces). In addition, there are park and ride service at Tregurra (circa 1,400 spaces) to the east and Langarth (circa 1,200 spaces) to the west. There are also cycle parking spaces available.

4.15 The bus station is located near Lemon Quay to the south of the city and is served by a number of bus routes connecting Truro to other nearby towns and villages. The train station is located outside of the city centre to the north-west. It is a circa 15 minute walk into the centre although there are also frequent bus services into the city.

Crime

4.16 Police UK data indicates there were circa 1,228 reported crimes in the city centre between July 2018 and June 2019 (circa 102 reported crimes/month). By comparison, there were 3,659 (circa 305/month) reported crimes in Exeter city centre over the same period. Unfortunately due to Covid-19, more up to date figures are not currently available.

4.17 Over this period, by far the most reported crime in Truro was anti-social behaviour (42%). As per the overall statistics for Cornwall, crime in Truro is low.

Summary and conclusions

4.18 The health check analysis in this section demonstrates Truro city centre is vital and viable, despite the slightly higher than average vacancy rate. It has an aesthetically pleasing environment, with high quality paving and attractive buildings. It provides functional spaces and the facades and shop units are in good condition. There is plenty of car parking and sustainable travel options. The centre also has significant opportunity to improve through the redevelopment of Pydar Street and the refurbishment of the Hall for Cornwall.

5.0 Sequential Site Assessment

5.1 This Section considers the main town centre uses proposed in the context of the sequential test as set out in national planning policy.

5.2 As set out in section 3, LPAs should apply a sequential test to planning applications for main town centre uses which are neither in an existing centre nor in accordance with an up-to-date plan. Main town centre uses should be located in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered. Preference will be given to accessible sites that are well connected to the town centre and applicants should demonstrate flexibility on issues such as format and scale. The Planning Practice Guidance on impact and the sequential approach indicates that sites should be considered in terms of their suitability, viability and availability. It is important to note that the NPPF does not refer to disaggregation, but only format and scale, and this is considered in more detail below.

5.3 The site is located out of centre with the main town centre uses proposed as follows:

Table 5.1 Proposed Floorspace

Proposed Uses	Proposed Gross Internal Area (sq. m)
Convenience Goods Retail (Class E)	2,060 sq. m (1,450 sq. m net sales)
Comparison Goods Retail (Class E)	1,500 sq. m (1,200 sq. m net sales)
Financial / Professional services (Class E)	500 sq. m
Food and beverage (Class E)	1,540 sq. m
Micro-Brewery (Sui generis)	1,500 sq. m
Office / Employment uses (Class E)	15,500 sq. m
Health /Community / Education uses (Class E / F1)	13,430 sq. m
Other leisure uses (Class E / F2)	2,500 sq. m
TOTAL	38,530 sq. m

5.4 The requirements of the sequential test for these main town centre uses is set out below.

Market and Locational Need

5.5 The PPG (2014) which accompanies the NPPF states that when applying the sequential test, it should be recognised that certain main town centre uses have particular locational requirements, which mean that they can only be accommodated in specific locations.

5.6 With regard the sequential test, there is a specific locational need for the proposed main town centre uses, to serve the new residents of the proposed development.

5.7 The site has been identified for strategic residential led development by Cornwall Council. The commercial elements will ensure a sustainable form of development, with residents able to meet many of their day to day needs within the site itself. As such, there are no sites within or on the edge of the defined centres which would therefore be suitable to accommodate the proposed development. Accordingly, the proposed development complies with the sequential test.

5.8 Notwithstanding this, for completeness, we have assessed potentially sequential sites in Truro in accordance with national planning policy. The methodology is set out below, together with an assessment of the identified sites.

Flexibility

- 5.9 The Courts have provided clarification on the application of the sequential test and the need for applicants to demonstrate flexibility i.e. the test in the NPPF and PPG. These judgements provide important legal precedents that apply to the interpretation of the NPPF. The Supreme Court's ruling in the case of Tesco Stores Ltd v Dundee City Council (2012) established that 'suitability' is very much related to the applicant's or retail occupier's own requirements. Para. 29 of the Judgement (Lord Reed) states that a key question is "whether an alternative site is suitable for the proposed development, not whether the proposed development can be altered or reduced so that it can be made to fit an alternative site".
- 5.10 This principle has now been established in English law in the Administrative Court judgement in the case of R (on the application of Zurich Assurance Ltd T/A Threadneedle Property Investment v North Lincolnshire Council) [2012].
- 5.11 The Rushden Lakes decision (Appeal Reference APP/G2815/V/12/2190175) also clarifies whether there is any longer a requirement to assess the scope for disaggregation. Importantly this was ultimately a Secretary of State decision. When commenting on the disaggregation issue the Inspector stated:
- "There is no longer any such requirement stated in the NPPF...Had the Government intended to retain disaggregation as a requirement it would and should have explicitly stated this in the NPPF. It is too large a point to rest on implication. If it had been intended to carry on with the requirement then all that would have been required is the addition of the word "disaggregation" at the end of NPPF [24]." (para. 2.68)*
- 5.12 The Secretary of State's recent decision letter (Ref: APP/A1530/W/16/ 3147039) relating to out of centre retail and leisure development at Tollgate in Colchester confirms the interpretation of the sequential test in terms of suitability and appropriate flexibility. The Secretary of State's decision indicates at paragraph 13 the alternative sequential site put forward by the Council and Rule 6 parties "would not be closely similar to the appeal scheme" and hence it was not suitable.
- 5.13 Alternative sequential opportunities must therefore provide accommodation that are "closely similar" to the application proposals.

Availability

- 5.14 In terms of availability, the previous version of the NPPF (2012) asked whether town centre or edge of centre sites were 'available'. It did not ask whether such sites are likely to become available during the remainder of the plan period, or over a period of some years. The revised NPPF (2019), however confirms that:
- "...only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered."*
- 5.15 Therefore, the sequential assessment in this section is based on accommodating a closely similar proposal, within a reasonable timeframe.

Site Search Parameters

- 5.16 The proposed development includes the provision of up to circa 38,530 sq. m of commercial floorspace as set out in Table 5.1 above. However, to demonstrate flexibility, a site that can accommodate around 26,800 sq. m of floorspace plus servicing areas and parking is the smallest development area that could be reasonably considered. This would require a site no

smaller than circa 3ha. This reflects the proposed floorspace, with a smaller allowance for the proposed employment uses which are more likely to be multi-storey.

- 5.17 In terms of the availability of sites, the analysis assumes construction will commence in 2022 with occupation in 2024. Development sites that cannot be delivered within a reasonable timeframe, have been discounted as unavailable, consistent with the NPPF.

Analysis of Potential Sequential Sites

- 5.18 In accordance with national planning policy, we have assessed potentially sequential preferable sites in, and on the edge of Truro as the nearest defined centre to the development.

- 5.19 The NPPF confirms that, in relation to development of main town centre uses, the 'centre' constitutes the main town centre boundary. Edge-of-centre sites are defined as being locations which are well connected to, and within easy walking distance (i.e. up to 300 metres) of the town centre boundary. For the purpose of this assessment, we have identified potentially sequentially preferable sites within 300 metres of the defined city centre boundary.

- 5.20 The methodology adopted in identifying site availability is as follows:

- 1 **Development Plan and Evidence Base:** to identify sites allocated for commercial development within the defined centres.
- 2 **Existing Permissions and Proposals:** to establish the existence of extant planning permission and applications for commercial development.
- 3 **On the Ground Site Survey:** to establish from a detailed site survey, sites or buildings with potential for development occupancy, such as cleared sites, undeveloped sites or redundant buildings.

- 5.21 Adopting the above approach enables the identification of all potential development sites. Where sites have emerged, a thorough assessment is then made to establish their suitability, viability, availability and potential to accommodate the proposed development performing a similar function as that proposed. The criteria adopted for the site assessments has been as follows:

- 1 **Site Size:** configuration and location relative to the defined shopping core;
- 2 **Location:** to establish whether the site lies within or on the edge of the centres in the study area;
- 3 **Policy Constraints:** to consider development plan policies, in particular, site specific policies are identified;
- 4 **Servicing/Accessibility Considerations:** to establish whether the site can be satisfactorily serviced and accessed by vehicles, including public transport, with consideration given to potential impact on the local highway network and safety;
- 5 **Planning Consents and Other Proposals:** to establish whether there are any extant applications for development on the sites identified and the likelihood and timescales of permissions being implemented;
- 6 **Site Ownership/Land Assembly:** to establish whether the site is in multiple ownership, which may constrain the site's potential for future development;
- 7 **Existing Uses:** to establish what the current land uses are at each site, and whether there is a requirement for their relocation;

- 8 **Commercial viability:** to establish whether it would be commercially viable for the operator to develop on the site identified;
- 9 **Other constraints:** to establish whether there are any other constraints to potential development/ redevelopment of a site identified, for example, conservation areas, listed buildings, tree preservation orders, topography etc.

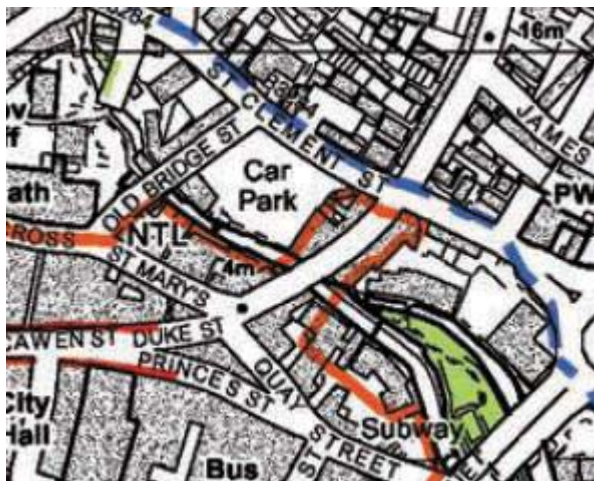
Assessment of Identified Sites

- 5.22 In July 2019, a planning application (ref: PA19/05930) was submitted to Cornwall Council seeking planning permission for circa 13,582 sq. m of main town centres uses at the development site known as 'Hendra' which is located to the east of the Langarth Garden Village site. The planning application was refused in March 2020, but the Council considered that the proposals did meet the sequential test. This assessment has therefore been used as a starting point for this sequential assessment.

Old Bridge Street Car Park

- 5.23 This site is just 0.36 hectares and is in operation as a car park. The site was discounted by both the applicant and the Council as an alternative site for the Hendra scheme and the size is well below the site parameters required for this site. It is therefore discounted as being unsuitable.

Figure 5.1 Old Bridge Street Car Park Site Area (marked 'Car Park')



Source: Truro and Kenwyn Neighbourhood Development Plan

Former Bus Depot (Fairmantle Street Car Park)

- 5.24 This site is just 0.26 hectares and is in operation as a car park. The site was discounted by both the applicant and the Council as an alternative site for the Hendra scheme and the size is well below the site parameters required for this site. It is therefore discounted as being unsuitable.

Figure 5.2 Fairmantle Street Car Park Site Area (shaded purple)



Source: Truro and Kenwyn Neighbourhood Development Plan

Moorfield Car Park

- 5.25 This 1.24 hectare site is designated under EJ2 of the TKNP as a mixed use development site and comprises a level public car park and a three-storey multi storey car park at the northern side. The site is far too small to accommodate the development as a whole and is therefore discounted as being unsuitable.

Figure 5.3 Moorfield Car Park Site Area (shaded purple)



Source: Truro and Kenwyn Neighbourhood Development Plan

- 5.26 The Hendra application stated that the site is not available and the loss of existing car park provision would need to be compensated elsewhere. Earlier retail studies undertaken concluded that further properties may need to be acquired to deliver an appropriate development site.
- 5.27 For these reasons, in addition to the policy requirement for mixed use development in the TKNP, the Council found that the site is not suitable or available for retail development. These issues are even more stark for the development proposal and therefore the site is discounted for being unavailable and unsuitable.

Pydar Street

- 5.28 This site is designated under EJ2 of the TKNP as a mixed use development site. The Truro City Report (December 2019) states that this site, which includes the viaduct carpark, Truro Bowl and the former CC offices and land around Carrick House, is earmarked for redevelopment.

Figure 5.4 Pydar Street Site Area (purple shading)



Source: Truro and Kenwyn Neighbourhood Development Plan

- 5.29 A number of schemes have been put forward at the site although after much public consultation, a planning application was submitted in June 2020 for: *“Outline with all matters reserved for up to 320 dwellings, up to 400 student bed spaces, up to 21,000sqm of employment space including leisure, office, hotel, community, small retail, education/innovation and food and beverage units and associated works including Environmental Impact Assessment”*.
- 5.30 The officer’s report for the Hendra application concluded that the Council is proceeding with proposals for mixed use re-development of the site. As such, the site was not considered to be available for the development. The applicant’s sequential assessment also concluded that the mixed use policy requirement within the TKNP meant that the site is unsuitable for the type of retail development proposed.
- 5.31 The submission of the planning application demonstrates that the Council is actively pursuing residential-led mixed use development at the site meaning it is unavailable for the proposed development. The site is also not large enough to support the proposals.
- 5.32 The site is not considered to be available or suitable for the proposed development.

Garras Wharf

- 5.33 Within the delegated report for the Hendra scheme, the Council considered a further site known as Garras Wharf. Garras Wharf is situated within the city centre boundary but is not identified within the TKNP for any purpose.

Figure 5.5 Garras Wharf Site Area



Source: Google Earth

- 5-34 Part of Garras Wharf is occupied by a Tesco supermarket and there are no indications that it plans to move. It is concluded that this part of the site is unavailable.
- 5-35 Adjacent to the Tesco store on the other side of Newham Road, there is a former B&M stores unit and a former Office Depot unit – both are vacant. The site is just 0.85 hectares in size and in September 2020, a planning application was submitted for “*demolition of existing retail units and construction of new Aldi foodstore, reconfiguration of car park, associated landscaping and amended access*”.
- 5-36 Having regard to the site’s size and the submitted planning application which demonstrates the intentions to redevelop, it is considered that this site is not suitable or available for the proposed development.

Other Sites

- 5-37 No other sites within Truro City Centre or within circa 300m of the city centre boundary have been identified through review of the development plan, commitments or through the on the ground survey.

Summary

- 5-38 There is a specific market and locational need for the commercial floorspace to be provided within the application site. The facilities proposed can only be located at the application site as they are intended to serve the new residents of the proposed development and the local catchment area. Other sites away from the site would not be suitable or viable, and therefore the development complies with the sequential test.
- 5-39 Notwithstanding this commercial rationale, the analysis of potential alternative sites demonstrates that there are no available, suitable and viable sites that can accommodate the proposed commercial element of the development. As a result, the application site is the most sequentially preferable site to accommodate the proposed development and the sequential test is passed.

6.0 Capacity and Impact Assessment

- 6.1 In terms of impact, the NPPF (2019) states (paragraph 89) that Local Planning Authorities, when assessing applications for retail and leisure development outside of town centres, which are not in accordance with an up to-date Local Plan, should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sqm).
- 6.2 Impact assessments should consider:
- 1 the impact of the proposal on existing, committed and planned public and private investment in centres in the catchment area of the proposal; and
 - 2 the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider retail catchment (as applicable to the scale and nature of the scheme).
- 6.3 The proposed retail and leisure floorspace proposed totals 13,330 sq. m gross and therefore is above the defined threshold.

Table 6.1 Retail and leisure Floorspace Proposed

Proposed Use Class	Proposed Gross Floorspace (sq. m)	Proposed Net Floorspace (sq. m)
Convenience Goods Retail	2,060 sq. m	1,450 sq. m
Comparison Goods Retail	1,500 sq. m	1,200 sq. m
Financial / Professional services	500 sq. m	500 sq. m
Food and beverage	1,540 sq. m	1,540 sq. m
Micro-Brewery	1,500 sq. m	Assumes bar area of 500 sq. m
Other leisure uses	2,500 sq. m	2,500 sq. m
TOTAL	9,600 sq. m	7,690 sq. m

- 6.4 An impact assessment is therefore set out below. This impact assessment is proportionate to the scale of the retail and leisure floorspace proposed. The impact assessment also has regard to the fact that the proposed 9,600 sq. m of retail / leisure floorspace is circa 15,959 sq. m less than what has previously been approved at the site (see Table 2.3 above).

Methodology and Data

- 6.5 The quantitative analysis draws on information from the GVA Retail Study (2010), GVA Retail Study Update (2015) and the GVA 'Assessment of Retail Planning Policy: Retail Development Proposals, Truro & Threemilestone' (dated February 2015) report, all of which were produced on behalf of Cornwall Council.
- 6.6 The quantitative assessment for the proposed new centres includes the following:
- 1 identification of an appropriate catchment area for the proposed new development. Experian population and local expenditure projections have been obtained;
 - 2 estimations of the existing trade draw and trading performance of retail facilities in and around Truro, drawing on household shopper survey information from the Council's Retail Study Update 2015; and
 - 3 an assessment of the future quantitative capacity for retail uses (comparison, convenience goods and food/beverage) generated by the circa 3,550 new dwellings and existing

population within the catchment area, provided at 5-year intervals (2020, 2024, 2029, 2034, 2048 and 2039), linked to the completion of new homes across the development site. For the purposes of this assessment, the 200 extra care units and the 50 student/health accommodation units have not been factored in.

Price base

- 6.7 All monetary values expressed in this study are at 2018 prices, consistent with Experian Briefing Note 17, February 2020.

Catchment area

- 6.8 The quantitative analysis is based on an identification of an appropriate catchment area for the proposed development. The primary catchment of LGV and the existing shops within Threemilestone is unlikely to extend beyond 2 kilometres, as shown in Appendix 1. The 0-2 km radius includes the entirety of the proposed development area as well as the existing residents around Threemilestone. This represents an appropriate local catchment area.
- 6.9 Given key attractors in this area, including Truro city centre, Truro College, the hospital and the proposed stadium, sufficient allowance for 'inflow' from visitors has also been factored into the assessment.

Population and expenditure

- 6.10 The study area population for 2020 to 2039 is set out in Table 1 in Appendix 2. The Experian population data has been obtained for the base year 2020. The submitted proposals for LGV indicate that there is capacity to provide circa 3,550 dwellings plus 200 extra care and 50 key health worker / student units. However, to ensure a robust assessment, only the 3,550 dwellings has been considered in the below analysis.
- 6.11 These dwellings are expected to be completed by 2038, with the first phase being completed by 2024. Table 1 sets out expected population growth, based on the expected phasing of development. An average of 2.3 people per dwelling has been assumed for the new dwellings, with an average completion rate of 197 dwellings per annum.

Table 6.2 Expected Dwelling Delivery at LGV

	2020	2024	2029	2034	2039
LGV Dwelling Delivery	0	616	1,606	2,837	3,550
New Population	0	1,417	3,693	6,526	8,165

- 6.12 The baseline projections suggest population within the LGV catchment area (indigenous growth and from new LGV homes) will increase from 4,653 in 2020 to 13,424 by 2039.
- 6.13 Assessing future expenditure levels within this report needs to consider economic prospects, particularly in the short and medium term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the development period. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be considered and a balanced approach taken.
- 6.14 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future.

- 6.15 For convenience goods, Experian's long term growth forecasts (February 2020) anticipate limited growth (0.1% per annum) from 2020. For comparison goods, higher levels of growth are expected in the future (3.2% per annum from 2020), still at a lower rate than previous pre-recession trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.
- 6.16 New forms of retailing (multi-channel shopping) have continued to grow. Home/electronic shopping has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. This assessment makes an allowance for future growth in e-tailing based on Experian projections.
- 6.17 Given the likelihood that multi-channel shopping will continue to grow at a faster pace than total retail expenditure, the assessment has adopted relatively cautious growth projections for retail expenditure and an allowance has been made for retailers to increase their turnover density, due to growth in home shopping and click and collect.
- 6.18 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within the catchment area. Forecasts for comparison goods and food/beverage are shown in Table 2 in Appendix 3 and Appendix 4 respectively.
- 6.19 Based on the population projections outlined above and growth in per capita spending, convenience goods spending within the catchment area is forecast to increase from £9.91 million in 2020 to £28.50 million in 2039, as shown in Table 3 (Appendix 2).
- 6.20 Comparison goods spending is forecast to increase significantly between 2020 and 2039, increasing from £15.96 million to £74.19 million in 2039, as shown in Table 3 (Appendix 2).
- 6.21 Food and beverage spending is forecast to increase from £6.01 million in 2020 to £21.44 million in 2039 as shown in Table 3 (Appendix 3).
- 6.22 These figures relate to real growth and exclude inflation.

Existing spending patterns in the Catchment Area

Convenience Shopping in Truro (Class A1)

- 6.23 Convenience shopping within the catchment area is limited to an existing Co-op, Costcutter and a Spar shop. The benchmark turnover of these existing convenience stores is estimated to be circa £4.6 million, as shown in Table 6 in Appendix 2. Broadly 50% of this turnover can be attributed to the new Co-op food store, which acts as an important anchor in the existing village centre of Threemilestone.
- 6.24 The results of the household shopper survey (GVA Retail Study Update 2015) have been used to estimate existing convenience goods shopping patterns in the wider Truro area for 2020. To estimate this, Zones 9, 10, 11 and 12 of the GVA study (which all cover the Truro area) were assessed. The results for this wide area demonstrate that Truro retains about 59% of convenience goods expenditure within these four zones (see Tables 11 and 12 in Appendix 2). A significant amount of convenience goods expenditure leaks from the local area, primarily to large food stores in Camborne, Pool and Redruth which is understandable given the local geography.
- 6.25 This level of retention implies that existing convenience stores within the local area are trading well, particularly given there will be a significant amount of 'inflow' from tourists and other visitors, particularly in the summer months.

Comparison shopping

- 6.26 There are several retail parks within the catchment area that primarily act as the 'bulky goods' shopping destinations serving Truro and the wider area. This includes Treliske Retail Park, Threemilestone Retail Park and West Truro Retail Park.
- 6.27 The GVA Retail Study 2015 estimates that comparison goods expenditure currently attracted by all shopping facilities within Truro is estimated to be £490.6 million in 2020 and as shown in Table 7 in Appendix 2 this is expected to rise to £753.46 million by 2034.
- 6.28 Truro, as the only city within Cornwall, attracts trade from a significant geographical area which is demonstrated within the GVA study. When assessing the four most relevant zones for Truro within this study (Zones 9 – 11), it's clear that the majority of competition comes from Camborne, Pool and Redruth; Falmouth & Penryn; Newquay; and St Austell.

Food and beverage

- 6.29 The GVA Retail Study did not consider food and beverage and therefore the existing spending patterns for the catchment area or Truro cannot be estimated from this study.
- 6.30 In the catchment area, the food and beverage offer is fairly limited to KFC, McDonalds, Subway, a bakery and hot food takeaways in Threemilestone village and the Victoria Inn. Truro centre has several chain restaurants (Pizza Express, Ask Italian etc) and independents. Again, as the only city centre and an attractor for both residents and visitors, it is likely that Truro's food and beverage offering draws trade from a wide geographical area.
- 6.31 Food and beverage floorspace at the proposed development is expected to provide for the needs of the residents of that development only.

Leisure / Commercial

- 6.32 The GVA Retail Study did not consider the need for leisure uses and therefore the existing spending patterns for the catchment area or Truro cannot be estimated from this study.
- 6.33 The leisure offer within the catchment area is extremely limited, with Truro leisure centre providing the only major leisure offer in Threemilestone. Truro city centre provides additional leisure facilities including the 5 screen Plaza Cinema on Lemon Street, Truro Bowl (although this is within the Pydar Street site marked for redevelopment), the Hall for Cornwall (which once reopened will provide a 1,354 seat auditorium), the 200 seat Burrell Theatre, the Truro Playhouse and various private member gyms / fitness clubs.
- 6.34 Up to 2,500 sq. m of leisure floorspace is proposed as part of the development. The end uses are not defined at the current time with permission sought for Class E/F2 use. However, it is envisaged that the floorspace will be located adjacent to the proposed stadium, forming a sports focussed leisure 'hub' and may include facilities such as a climbing wall / bouldering, a gym etc.
- 6.35 It is not envisaged that a cinema or a theatre will be provided on site, thus minimising any overlap of provision with existing leisure facilities in the city centre. These types of uses now fall under sui generis, providing further comfort to the Council.
- 6.36 Based on Lichfields experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. However, in a more rural location such as Cornwall, such facilities may be expected to draw trade from slightly further afield.
- 6.37 As such, depending on the type and nature of the floorspace, the proposed leisure development would be expected to provide for the needs of the residents of the development as well as the

wider catchment area. However, this should be complimentary to and not in competition with the city centre.

Future spending patterns

6.38 As indicated above, population and expenditure within the catchment area are projected to grow significantly. Threemilestone village currently retains a relatively low proportion of retail expenditure within the local catchment area. As a minimum, Threemilestone including the new garden village, should seek to meet the local and day to day needs of residents within the local catchment area.

6.39 The development of the new local centre within LGV provides an opportunity to increase expenditure retention within the local catchment area by improving the range and choice of facilities available. Future floorspace capacity has been assessed based on expected expenditure retention from both new LGV residents and the wider 0-2km catchment area.

6.40 Realistic minimum expected expenditure retention rates (% market share) are as follows:

Table 6.3 Retention Rates (% Market Share)

	Langarth Garden Village	0 – 2km catchment	Inflow
Convenience Goods	55%	45%	20%
Comparison Goods	20%	10%	5%
Food / beverage	30%	20%	10%

6.41 These market shares are considered viable in terms of the scope to expand existing facilities, the proposed scale of the new retail facilities and the amount of expenditure leakage from the local catchment area.

Convenience Floorspace Capacity

6.42 Following the application of the above market shares, the future retention of expenditure is shown in Table 5, Appendix 2. Based on the provision of circa 3,550 dwellings, future levels of available convenience goods expenditure in 2024, 2029, 2034 and 2039 are provided. This demonstrates surplus available convenience expenditure of £5.57 million at 2020, rising to £15.81 million at 2039.

6.43 Table 7, Appendix 1 subtracts the benchmark turnover of existing convenience sales floorspace from available expenditure to calculate the amount of surplus expenditure that may be available to support new development. The surplus expenditure projections have then been converted into floorspace estimates in Table 7 in Appendix 2. Expenditure is converted into floorspace estimates using an assumed average sales density figure of £7,000 per sq. m at 2020, based on a turnover which will be realistically achievable for convenience operators in LGV, and similar to the turnover of existing facilities in Threemilestone. No single large supermarket is proposed, with provision likely to be formed of small convenience stores and other operators such as bakers, butchers etc.

6.44 Up to 2,050 sq. m gross of convenience goods floorspace is proposed at the LGV development, with floorspace distributed through five local centres which will be delivered in phases. It's noted that there is capacity for the proposed level of convenience floorspace by 2039, at which point the development should be built out in its entirety (expected completion 2038). The phasing of the development will assist in balancing convenience retail provision with housing delivery leading to a sustainable form of development.

Capacity for comparison goods floorspace

- 6.45 As for the convenience capacity assessment, the assumed retention rates have been used to determine the future levels of available comparison goods expenditure in 2024, 2029, 2034, and 2039. This demonstrates available comparison expenditure of £1.68 million at 2020, rising to £12.09 million by 2039.
- 6.46 The available expenditure projections have then been converted into floorspace estimates in Table 6, Appendix 3. Expenditure is converted into floorspace estimates using an appropriate average sales density figure of £6,000 per sq. m at 2020, based on a turnover which will be realistically achievable for small scale comparison retail operators in LGV.
- 6.47 It is assumed that the turnover of existing comparison floorspace will increase in real terms in the future. Experian's recommended growth rates have been adopted (see table footnote for details).
- 6.48 The retention of comparison goods expenditure within LGV is much lower than for convenience goods shopping, because residents will generally travel further and shop around for comparison goods i.e. they will travel into Truro or even further to visit larger shopping destinations. The provision of additional shopping facilities within LGV should however assist in increasing expenditure retention in the local catchment area.
- 6.49 The development proposes up to 1,500 sq. m (gross) of comparison floorspace to be distributed through the local centres within the scheme. As demonstrated in Table 6, there is capacity for the proposed level of comparison floorspace by 2039, at which point the development should be built out in its entirety (completion expected by 2038).

Capacity for food and beverage floorspace

- 6.50 The future levels of available food and beverage expenditure in 2024, 2029, 2034 and 2039 are shown at Table 3 in Appendix 4.
- 6.51 As for the retail capacity assessment, the assumed retention rates have been used to determine the future levels of available food and beverage expenditure in 2024, 2029, 2034 and 2039. This demonstrates available expenditure of £3.5 million at 2020, rising to £11.4 million by 2039.
- 6.52 Available food and beverage expenditure has then been converted into food and beverage floorspace projections at Table 6 in Appendix 4, adopting average sales densities in 2020 of £5,000 per sq. m.
- 6.53 It is assumed that the microbrewery will provide circa 500 sq. m of bar/restaurant area, with the rest of the floorspace dedicated to the brewing process / backhouse areas. Therefore, it is expected that food and beverage floorspace will be circa 2,040 sq. m across the development site. As demonstrated in Table 6, Appendix 4 there is expected to be capacity for this level of floorspace by 2039.
- 6.54 It should be noted that an increased level of inflow has been assumed for this floorspace due to the proximity of the proposed Stadium which will attract visitors from well beyond the 2km catchment area.

Retail Impact Assessment

- 6.55 The level of trade diversion and impact caused by the development of the local centres will depend on the scale of floorspace and the timing of development. The floorspace capacity projections above assume most (about two thirds) of the local centre's turnover will be

generated by new residents within the Garden Village, rather than the indigenous population. No significant adverse impact on Truro is envisaged.

- 6.56 The majority of the proposed retail floorspace is to be distributed throughout the development within five local centres which will be delivered in line with the proposed housing development and commercial floorspace.
- 6.57 The site is to be built out between 2021 and 2038. However, the assessment assumes that all the proposed retail floorspace will be delivered by 2034. The expected retail turnover of the new convenience and comparison uses in the local centres at 2034 is £20.51 million, broken down as follows:
- Convenience goods retail = £10.36 million
 - Comparison goods retail = £10.14 million
- 6.58 As a conservative estimate, the impact assessment assumes only 40% of this turnover will be generated from new expenditure within the Garden Village, and therefore not more than 60% will be diverted trade from the indigenous population, resulting in trade diversion from existing shopping destinations.

Convenience goods impact

- 6.59 Permissions are already in place which propose to provide circa 6,064 sq. m net of convenience floorspace across the application site. This latest proposal seeks to reduce this figure to just 1,450 sq. m net (a reduction of 4,614 sq. m net).
- 6.60 Turnover information for existing retail destinations (assuming no new Garden Village development) has been derived from the Cornwall Retail Study Update. Tables 9 to 11 in Appendix 2 provide convenience goods population expenditure projections for Study Area zones 9 to 12. Base year market shares within these four zones are shown in Table 12 in Appendix 2, and base year trading levels are shown in Table 13. Base year trading levels has been projected to 2034 in Table 14 in Appendix 2. Lichfields impact assessment for 1,450 sq. m net (2,060 sq. m gross) of convenience goods floorspace completed by 2034 is shown in Table 15 in Appendix 2.
- 6.61 The highest levels of trade diversion are expected to come from large out of centre food stores on the west side of Truro, i.e. Sainsbury's and Aldi, and also Tesco on the edge of the city centre. All of these stores will continue to trade at higher levels in 2034 when compared with the base year turnover at 2020.
- 6.62 The Co-op at Threemilestone will experience the highest proportional reduction (-9.7%) in trade, but this reduction will be partially offset by expenditure growth between 2020 and 2034. The residual turnover of the Co-op store is £1.74 million, only 3.4% below the base year turnover £1.80 million. This store would not be expected to close.
- 6.63 Impact on the three main stores (Co-op, Marks & Spencer and Iceland) in Truro city centre is only £0.3 million, and this low level of trade diversion will be more than offset by expenditure growth. No significant adverse impact is envisaged on the convenience goods sector within the city centre, even if the maximum amount of floorspace is provided at 2034.
- 6.64 The Council has previously approved circa 6,064 sq. m net of convenience floorspace across this site. As such, it is considered that the proposed reduction of convenience floorspace through this application to 1,450 sq. m will significantly benefit Truro city centre in the long term whilst still providing sufficient facilities for local residents.

Comparison goods impact

- 6.65 Comparison good turnover levels at 2020 and 2034 have also been derived from the Cornwall Retail Study Update as shown in Table 7 of Appendix 3.
- 6.66 Lichfields impact assessment for 1,200 sq. m net (1,500 sq. m gross) of comparison goods floorspace completed by 2034 is shown in Table 7 in Appendix 3.
- 6.67 Trade diversion from existing comparison goods facilities in Truro is £6.08 million, which is 60% of the total turnover generated by indigenous population. This trade diversion represents circa 1.2% reduction in total turnover at 2034. This level of impact will be quickly offset by population/expenditure growth. The residual turnover of Truro is £748.89 million in 2034, compared with the base year turnover £490.61 million.
- 6.68 No discernible impact is envisaged on the comparison goods sector within the city centre.
- 6.69 The Council has previously approved 5,567 sq. m net of comparison floorspace across this site (10,370 sq. m if including the now lapsed permission at West Langarth). As such, it is considered that the proposed reduction of comparison floorspace through this application to 1,200 sq. m will significantly benefit Truro city centre in the long term whilst still providing sufficient facilities for local residents.

Food and beverage impact

- 6.70 The development proposes to provide 1,540 sq. m gross of Class E floorspace for food and beverage uses (previously falling under A3) as well as a 1,500 sq. m micro-brewery (sui generis) – 500 sq. m of which is assumed to be the bar/restaurant area. The expected turnover of this 2,040 sq. m of floorspace will be circa £10.94 million in 2034. This provision could include restaurant units and a small selection of cafés and coffee shops.
- 6.71 Table 3 in Appendix 4 indicates the Garden Village alone should generate food and beverage expenditure of £9.87 million by 2034. Additional diverted trade from the indigenous population is likely to spread over a wide area. Trade diversion from Truro city centre is likely to be a very small proportion of total turnover (less than 1%). No discernible impact is envisaged on the food/beverage sector within the city centre.
- 6.72 These impact figures suggest the delivery of five local centre would not negatively impact on Truro, because delivery would be phased in line with house completions.
- 6.73 Including the now lapsed West Langarth scheme, the Council previously approved circa 3,593 sq. m gross of food and beverage floorspace across this site and the proposed development broadly proposes food and beverage floor space in line with that which currently benefits from extant consent. As such, it is considered that the proposed food and beverage floorspace is appropriate and will have limited impact on Truro city centre whilst still providing sufficient facilities for local residents.

Leisure Impact Assessment

- 6.74 The GVA Cornwall Retail Study did not consider leisure uses. However, this section assesses the impact of the proposed commercial leisure and town centre uses in Langarth Garden Village.
- 6.75 The type and nature of the proposed leisure floorspace has not yet been defined, but the parameter plans allow for the provision of up to 2,500 sq. m gross of Class E/F2leisure floorspace.
- 6.76 However, it is envisaged that the floorspace will be located adjacent to the proposed stadium, forming a sports focussed leisure 'hub'. It is also not envisaged that a cinema or a theatre (now

falling under sui generis) will be provided on site, thus minimising any overlap of provision with existing leisure facilities in the city centre.

- 6.77 Based on Lichfields experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. However, in a more rural location such as Cornwall, such facilities may be expected to draw trade from slightly further afield.
- 6.78 As such, depending on the type and nature of the floorspace, the proposed leisure development would be expected to provide for the needs of the residents of the development as well as the wider catchment area. However, this should be complimentary to and not in competition with the city centre.
- 6.79 In terms of impact, such assessments are not required for less intensive sports uses as these are not considered to be main town centre uses as defined in the NPPF glossary. As such, an impact assessment is not required for less intensive sport related uses.
- 6.80 Furthermore, due to the existing lack of leisure facilities in Truro (other than cinema and theatre), additional diverted trade from the indigenous population is likely to spread over a wide area. Trade diversion from Truro city centre is likely to be a very small proportion of total turnover. No discernible impact is envisaged on the leisure sector within the city centre and it is considered that conditions can restrict floorspace to exclude cinema/theatre uses to further reduce any potential for impact on the city centre.

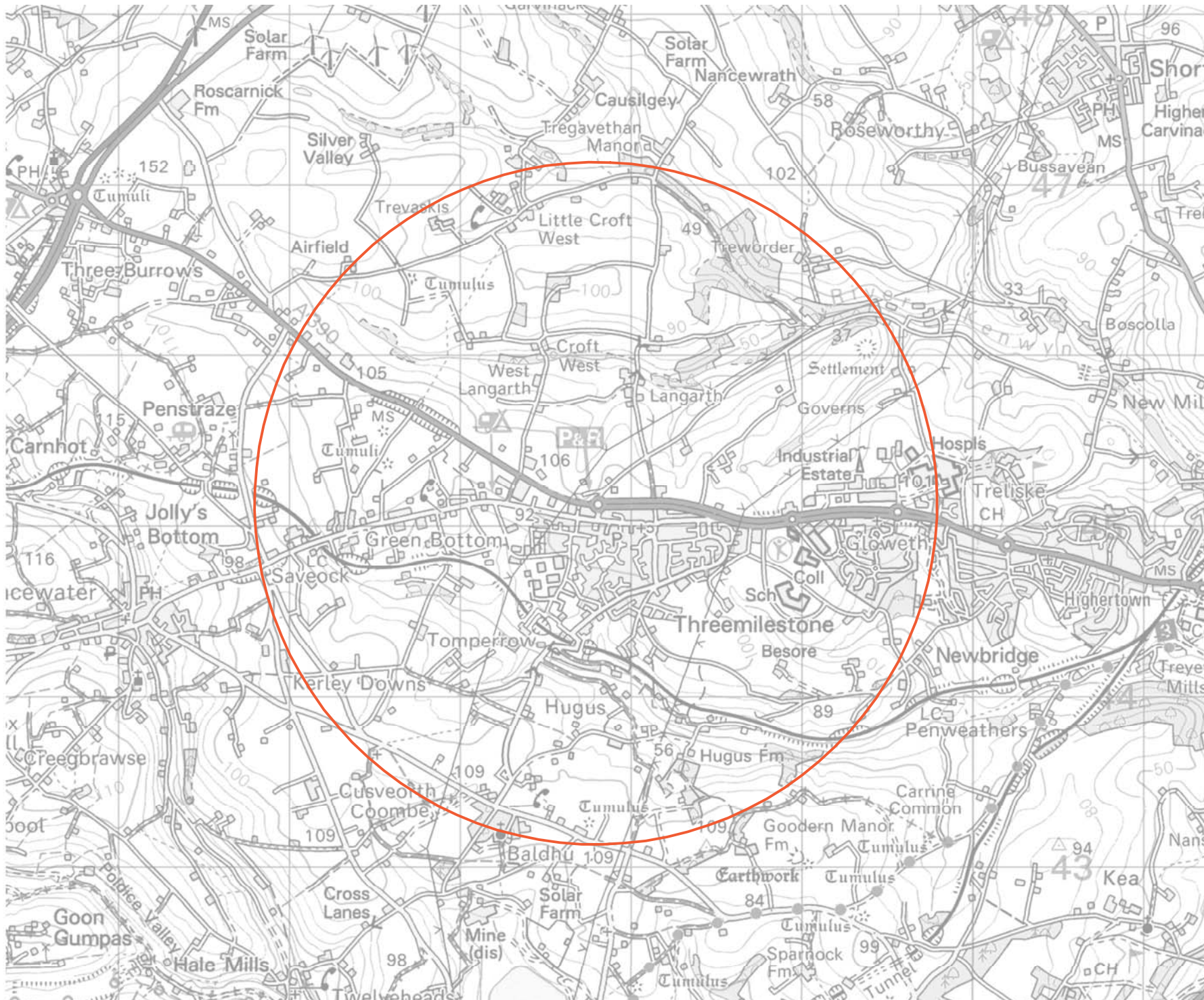
Other Proposed Facilities

- 6.81 The five local centres will also provide for community and health uses as well as retail services. This may include the following uses:
- Community hall / village hall / meeting spaces;
 - Doctor's surgery / other health facilities (such as a dentist / opticians / pharmacy); and
 - Childcare facilities / nursery.
- 6.82 The provision of these facilities will serve the new population of Langarth Garden Village and represents suitable and appropriate uses within the local centres which will contribute to a sustainable pattern of development.

7.0 Conclusion

- 7.1 This Retail Sequential and Impact Assessment has been prepared by Lichfields on behalf of the applicant. It accompanies an outline planning application for a new Garden Village development to be known as Langarth Garden Village.
- 7.2 This report has fully assessed the key retail and town centre policy considerations set out in the NPPF, the Statutory Development Plan and supporting documents. It is clear that local planning policy supports a mix of uses, including main town centre uses, in the Garden Village. The proposed mix of uses are consistent with the objectives of the adopted planning policy for the Langarth Garden Village.
- 7.3 There is a specific market and locational need for the commercial floorspace to be provided within the application site. The facilities proposed can only be located at the application site as they are intended to serve the new residents of the proposed development and the immediate (0-2km) local catchment area. The redevelopment of the site will comprise residential led, mixed use development.
- 7.4 Importantly, this latest application seeks to realign previous permissions, reducing the amount of convenience and comparison floorspace which has previously been approved at the site and thus reducing future impact on Truro city centre.
- 7.5 Other sites away from the site would not be suitable or viable, and therefore the development complies with the sequential test. Notwithstanding this commercial rationale, the analysis of potential alternative sites demonstrates that there are no available, suitable and viable sites that can accommodate the proposed commercial element of the development. As a result, the application site is the most sequentially preferable site to accommodate the proposed development and the sequential test is passed. In addition, the proposals seek to significantly reduce the amount of retail / leisure floorspace currently proposed across the site.
- 7.6 The retail assessment set out in this report shows that the commercial elements of the proposed development will not have a significant adverse impact on Truro city centre or any other designated centre. Furthermore, given the location-specific nature of the proposals, the proposed development is also not expected to adversely affect the development opportunities of other sites in the defined centres. It will also not result in an over-concentration of such uses in the area.
- 7.7 Overall the development is in line with relevant national and local retail planning policy and is acceptable in retail planning terms.

Appendix 1 Catchment Area



Key



Catchment Area: 2km

0 0.5 1km

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Project Threemilestone Retail Analysis

Title Catchment Area: 2km

Client AHR Architecture

Date 26.07.2019

Scale 1 : 30,000 @ A4

Drawn by MAR

Drg. No GIS\LF60733\02-01

GIS Reference: S:\LF Jobs\LF60733 - Threemilestone Design Framework
LF60733-02 - Threemilestone Retail Analysis - Catchment Area (2km) -
26.07.2019.mxd



Appendix 2 Convenience Impact

Table 1: Local Catchment Area Population

Zone	2020	2024	2029	2034	2039
Garden Village	0	1,417	3,693	6,526	8,165
0 to 2 km catchment	4,653	4,792	4,956	5,094	5,259
Total	4,653	6,209	8,649	11,620	13,424

Sources: Experian MMG3 population projections for 2020 - 2038, data for 2039 has been extrapolated. Langarth Garden Village 3,550 homes @ 2.3 people per home = 8,165 people

Table 2: Local Catchment Convenience Goods Expenditure per person (£)

	2020	2024	2029	2034	2039
0-2 km catchment	2,129	2,123	2,116	2,120	2,123

Sources: Experian Local Expenditure 2018 (2018 prices) and growth rates. Excluding special forms of trading.

Table 3: Local Catchment Total Convenience Goods Expenditure per person (£m)

	2020	2024	2029	2034	2039
Garden Village	£0.00	£3.01	£7.81	£13.83	£17.33
0 to 2 km catchment	£9.91	£10.17	£10.49	£10.80	£11.16
Total	£9.91	£13.18	£18.30	£24.63	£28.50

Sources: Tables 1 and 2

Table 4: Convenience Goods Expenditure Retention (% Market Shares)

	Langarth Garden Village (1)	0 to 2 km catchment (2)	Inflow from beyond 0 to 2 km catchment
% expenditure retained at Garden Village	55%	45%	20%

Notes: (1) Assumes 90% retention of top-up food expenditure and 25% retention of main food shopping in Garden Village. (2) Assumes 80% retention of top-up food expenditure and 30% retention of main food shopping in Garden Village.

Table 5: Convenience Goods Expenditure Retained (£m)

By year	Langarth Garden Village (1)	0 to 2 km catchment (2)	Inflow from beyond 0 to 2 km catchment	Total
2020	0.00	4.46	1.11	5.57
2024	1.65	4.58	1.14	7.38
2029	4.30	4.72	1.18	10.20
2034	7.61	4.86	1.21	13.68
2039	9.53	5.02	1.26	15.81

Source: Tables 3 and 4.

Table 6: Existing Convenience Goods Floorspace and Benchmark Turnover in 2km catchment area

Store	Sales Floorspace (sq.m net)	Convenience Floorspace (%)	Convenience Floorspace (sq.m net)	Floorspace Turnover (£ per sq.m)	Total Turnover (£m)
Co-op, Threemilestone	290	95%	276	£7,950	£2.19
Spar, Threemilestone	196	95%	186	£7,000	£1.30
Costcutter, Gloweth	160	95%	152	£7,000	£1.06
Total	646		614		£4.56

Source: VOA and GVA Retail Study Update Table 8. Turnover data from Global Data's Data Pack.

Table 7: Convenience Goods Floorspace Capacity

By year	Available expenditure £m	Turnover of existing facilities £m	Expenditure surplus £m	Turnover density new floorspace £psm net	Sales floorspace capacity sq.m net	Gross (1) floorspace capacity sq.m
2020	5.57	4.56	1.01	7,000	145	207
2024	7.38	4.63	2.75	7,106	387	553
2029	10.20	4.65	5.54	7,148	775	1,108
2034	13.68	4.65	9.03	7,148	1,263	1,805
2039	15.81	4.65	11.16	7,148	1,561	2,230

Notes: net to gross ratio 70%

Table 8: Truro Catchment Convenience Goods Market Shares (%)

Shop / Centre	Zone 9	Zone 10	Zone 11	Zone 12
Co-op, Boscowen Street	0.5%	3.7%	5.3%	0.9%
Marks & Spencer, Truro	0.7%	4.0%	0.7%	2.8%
Iceland, Truro	0.5%	0.7%	3.6%	0.0%
Aldi, Truro	4.6%	22.8%	8.4%	5.6%
Sainsbury's, Truro	10.9%	32.0%	17.5%	12.2%
Tesco, Truro	3.9%	19.2%	10.8%	19.5%
Truro, Other	0.8%	4.7%	2.5%	2.5%
Camborne, Pool & Redruth	60.1%	2.1%	6.6%	0.0%
Falmouth & Penryn	7.8%	2.6%	0.5%	1.2%
Newquay	0.0%	0.0%	14.2%	2.2%
St Austell	0.0%	0.7%	2.9%	23.7%
Other	7.0%	4.6%	24.8%	17.5%
Internet / Home Delivery	3.2%	2.9%	2.2%	11.9%
TOTAL	100.0%	100.0%	100.0%	100.0%

Source: GVA Retail Study Update (Table 4 - convenience goods market share by zone). Lichfields assumed 70% market share main shop: 30% top-up shop.

Table 9: Truro Catchment Area Population

Zone	2020	2024	2029	2034	2039
Zone 9	21,404	22,070	22,811	23,424	23,958
Zone 10	30,890	31,688	32,479	33,154	33,751
Zone 11	13,556	13,927	14,347	14,649	14,920
Zone 12	10,979	11,260	11,589	11,873	12,074
Total	76,829	78,945	81,226	83,100	84,703

Source: Experian MMG3 population projections for 2019 - 2038 and extrapolated to 2039

Table 10: Truro Catchment Convenience Goods Expenditure per person (£)

Zone	2020	2024	2029	2034	2039
Zone 9	2,304	2,298	2,290	2,294	2,298
Zone 10	2,296	2,290	2,282	2,286	2,290
Zone 11	2,366	2,360	2,351	2,356	2,360
Zone 12	2,473	2,467	2,458	2,463	2,467

Source: Experian Local Expenditure 2018 (2018 prices) and growth rates. Excluding special forms of trading.

Table 11: Truro Catchment Total Convenience Goods Expenditure (£m)

Zone	2020	2024	2029	2034	2039
Zone 9	£49.31	£50.72	£52.24	£53.73	£55.06
Zone 10	£70.92	£72.57	£74.12	£75.79	£77.29
Zone 11	£32.07	£32.87	£33.73	£34.51	£35.21
Zone 12	£27.15	£27.78	£28.49	£29.24	£29.79
Total	£179.46	£183.93	£188.57	£193.28	£197.34

Source: Tables 9 and 10

Table 12: Base Year 2020 Convenience Goods Market Shares (%)

Store / Centre	Zone 9	Zone 10	Zone 11	Zone 12
Co-op, Boscowen Street	0.4%	3.5%	5.1%	0.8%
Marks & Spencer, Truro	0.6%	3.8%	0.6%	2.6%
Iceland, Truro	0.4%	0.6%	3.5%	0.0%
Aldi, Truro	4.4%	22.4%	8.2%	5.3%
Sainsbury's, Truro	10.3%	29.5%	17.0%	11.8%
Tesco, Truro	3.6%	17.2%	10.0%	18.5%
Waitrose, Truro (opened 2016) ¹	2.8%	8.5%	5.5%	4.0%
Co-op, Threemilestone ²	0.4%	1.5%	1.5%	0.2%
Truro, Other	0.7%	4.5%	2.4%	2.3%
Camborne, Pool & Redruth	58.8%	1.4%	6.0%	0.0%
Falmouth & Penryn	7.6%	1.9%	0.4%	1.2%
Newquay	0.0%	0.0%	12.9%	2.2%
St Austell	0.0%	0.5%	2.8%	22.0%
Other	6.9%	1.9%	21.9%	17.2%
Internet / Home Delivery	3.2%	2.9%	2.2%	11.9%
TOTAL	100.00%	100.00%	100.00%	100.00%

Source: Table 4; GVA Retail Study Update (Table 4).

Notes: Waitrose / Great Cornish Foodstore started trading in 2016 with a combined floorspace of 1,850 sq. m (net) convenience. Lichfield estimated market share. Threemilestone Co-op opened 2019 with a net trading area of circa 425 sq. m. Lichfields assumed market share.

Table 13: Truro Catchment Base Year 2020 Convenience Goods Expenditure Patterns (£m)

Store / Centre	Zone 9	Zone 10	Zone 11	Zone 12	Total
Expenditure 2020	£49.31	£70.92	£32.07	£27.15	£179.46
Co-op, Boscowen Street	£0.20	£2.48	£1.64	£0.22	£4.53
Marks & Spencer, Truro	£0.30	£2.70	£0.19	£0.71	£3.89
Iceland, Truro	£0.20	£0.43	£1.12	£0.00	£1.75
Aldi, Truro	£2.17	£15.89	£2.63	£1.44	£22.13
Sainsbury's, Truro	£5.05	£20.89	£5.47	£3.21	£34.61
Tesco, Truro	£1.78	£12.20	£3.21	£5.02	£22.20
Waitrose, Truro (opened 2016) ¹	£1.38	£6.03	£1.76	£1.09	£10.26
Co-op, Threemilestone	£0.20	£1.06	£0.48	£0.05	£1.80
Truro, Other	£0.35	£3.19	£0.77	£0.62	£4.93
Camborne, Pool & Redruth	£29.00	£0.99	£1.92	£0.00	£31.91
Falmouth & Penryn	£3.75	£1.35	£0.13	£0.33	£5.55
Newquay	£0.00	£0.00	£4.14	£0.59	£4.73
St Austell	£0.00	£0.35	£0.90	£5.97	£7.23
Other	£3.40	£1.35	£7.02	£4.67	£16.44
Internet / Home Delivery	£1.55	£2.02	£0.69	£3.23	£7.50
TOTAL	£49.31	£70.92	£32.07	£27.15	£179.46

Source: Table 11 and 12

Table 14: Truro Catchment Design Year 2034 Convenience Goods Expenditure Patterns (£m)

Store / Centre	Zone 9	Zone 10	Zone 11	Zone 12	Total
Expenditure 2034	£53.73	£75.79	£34.51	£29.24	£193.28
Co-op, Boscowen Street	£0.21	£2.65	£1.76	£0.23	£4.86
Marks & Spencer, Truro	£0.32	£2.88	£0.21	£0.76	£4.17
Iceland, Truro	£0.21	£0.45	£1.21	£0.00	£1.88
Aldi, Truro	£2.36	£16.98	£2.83	£1.55	£23.72
Sainsbury's, Truro	£5.51	£22.32	£5.88	£3.45	£37.16
Tesco, Truro	£1.93	£13.04	£3.45	£5.41	£23.83
Waitrose, Truro	£1.50	£6.44	£1.90	£1.17	£11.01
Co-op, Threemilestone	£0.21	£1.14	£0.52	£0.06	£1.93
Truro, Other	£0.38	£3.41	£0.83	£0.67	£5.29
Camborne, Pool & Redruth	£31.60	£1.06	£2.07	£0.00	£34.73
Falmouth & Penryn	£4.08	£1.44	£0.14	£0.35	£6.02
Newquay	£0.00	£0.00	£4.45	£0.64	£5.09
St Austell	£0.00	£0.38	£0.97	£6.43	£7.78
Other	£3.71	£1.44	£7.56	£5.03	£17.74
Internet / Home Delivery	£1.69	£2.16	£0.75	£3.48	£8.08
TOTAL	£53.73	£75.79	£34.51	£29.24	£193.28

Source: Table 11 and 12

Table 15: Convenience Goods Impact at 2034

Store / Centre	Base year turnover 2020	Pre-development design year turnover 2034	% trade draw to Garden Village	Trade diversion	Post development design year turnover 2034	% impact at 2034
	£m	£m	£m	£m	£m	
Co-op, Boscowen Street	£4.53	£4.86	3%	£0.19	£4.68	-3.8%
Marks & Spencer, Truro	£3.89	£4.17	1%	£0.06	£4.11	-1.5%
Iceland, Truro	£1.75	£1.88	1%	£0.06	£1.82	-3.3%
Aldi, Truro	£22.13	£23.72	20%	£1.24	£22.48	-5.2%
Sainsbury's, Truro	£34.61	£37.16	30%	£1.87	£35.30	-5.0%
Tesco, Truro	£22.20	£23.83	15%	£0.93	£22.90	-3.9%
Waitrose, Truro	£10.26	£11.01	5%	£0.31	£10.70	-2.8%
Co-op, Threemilestone	£1.80	£1.93	3%	£0.19	£1.74	-9.7%
Truro, Other	£4.93	£5.29	3%	£0.19	£5.10	-3.5%
Camborne, Pool & Redruth	£31.91	£34.73	10%	£0.62	£34.11	-1.8%
Falmouth & Penryn	£5.55	£6.02	1%	£0.06	£5.95	-1.0%
Newquay	£4.73	£5.09	1%	£0.06	£5.03	-1.2%
St Austell	£7.23	£7.78	1%	£0.06	£7.72	-0.8%
Other	£16.44	£17.74	3%	£0.19	£17.55	-1.1%
Internet / Home Delivery	£7.50	£8.08	3%	£0.19	£7.89	-2.3%
TOTAL	£179.46	£193.28	100%	£6.22	£187.06	

Source: Table 13 and 14. Convenience turnover of Garden Village is £10.36 million (1,450 sq. m net @£7,148 psm net)
 40% of Garden Village turnover from new homes - 60% from indigenous population = £6.22 million

Appendix 3 Comparison Impact

Table 1: Local Catchment Area Population

Zone	2020	2024	2029	2034	2039
Garden Village	0	1,417	3,693	6,526	8,165
0 to 2 km catchment	4,653	4,792	4,956	5,094	5,259
Total	4,653	6,209	8,649	11,620	13,424

Sources: Experian MMG3 population projections for 2020 - 2038, data for 2039 has been extrapolated. Langarth Garden Village 3,550 homes @ 2.3 people per home = 8,165 people

Table 2: Local Catchment Comparison Goods Expenditure per person (£)

	2020	2024	2029	2034	2039
0-2 km catchment	3,431	3,753	4,333	4,813	5,527

Source: Experian Local Expenditure 2018 (2018 prices) and growth rates. Excluding special forms of trading.

Table 3: Local Catchment Total Comparison Goods Expenditure (£m)

	2020	2024	2029	2034	2039
Garden Village	£0.00	£5.32	£16.00	£31.41	£45.13
0 to 2 km catchment	£15.96	£17.98	£21.47	£24.52	£29.07
Total	£15.96	£23.30	£37.48	£55.93	£74.19

Source: Tables 1 and 2.

Table 4: Comparison Goods Expenditure Retention (% Market Shares)

	Langarth Garden Village (1)	0 to 2 km catchment (2)	Inflow from beyond 0 to 2 km catchment
% expenditure retained at Garden Village	20%	10%	5%

Notes: Lichfields' estimates based on lower order/day to day comparison goods

Table 5: Comparison Goods Expenditure Retained (£m)

By year	Langarth Garden Village (1)	0 to 2 km catchment (2)	Inflow from beyond 0 to 2 km catchment	Total
2020	0.00	1.60	0.08	1.68
2024	1.06	1.80	0.09	2.96
2029	3.20	2.15	0.11	5.46
2034	6.28	2.45	0.13	8.86
2039	9.03	2.91	0.15	12.09

Source: Tables 3 and 4

Table 6: Comparison Goods Floorspace Capacity

By year	Available expenditure £m	Turnover density new floorspace £psm net	Sales floorspace capacity sq.m net	Gross (1) floorspace capacity sq.m
2020	1.68	6,000	280	373
2024	2.96	6,636	446	594
2029	5.46	7,544	724	965
2034	8.86	8,453	1,048	1,398
2039	12.09	9,471	1,276	1,701

Notes: (1) net to gross ratio 75%; 2) Growth rates: 2020 = 2.1%, 2021 = 2.5%, 2022 - 2023 = 2.8% per annum, 2024-2026 = 2.8%, 2027 onwards 2.3% per annum applied.

Table 7: Comparison Goods Impact at 2034

Store / Centre	Base year turnover 2020 £m	Pre-development design year turnover 2034 £m	% trade draw to Garden Village £m	Trade diversion £m	Post development design year turnover 2034 £m	% impact at 2034
Truro	£490.61	£753.46	75%	£4.56	£748.89	-0.6%
Camborne, Pool & Redruth	£129.41	£198.75	10%	£0.61	£198.14	-0.3%
Falmouth & Penryn	£107.02	£164.35	2%	£0.12	£164.23	-0.1%
Newquay	£91.33	£140.26	2%	£0.12	£140.14	-0.1%
St Austell	£163.06	£250.41	2%	£0.12	£250.29	0.0%
Other	£530.55	£814.79	9%	£0.55	£814.25	-0.1%
TOTAL	£1,511.98	£2,322.03	100%	£6.08	£2,315.94	

Source: Cornwall Retail Study Update 2015 - 2019 comparison goods turnover estimates inflated for expenditure and population growth in 2020 (3.2%) and to 2034 (using Table 3).

Notes: Comparison turnover of Garden Village is £10.14 million (1,200 sq. m net @ £8,453 psm net) at 2034. 40% of Garden Village turnover from new homes - 60% from indigenous population = £6.08 million.

Table 8: Truro Catchment Area Population

Zone	2020	2024	2029	2034	2039
Zone 9	21,404	22,070	22,811	23,424	23,958
Zone 10	30,890	31,688	32,479	33,154	33,751
Zone 11	13,556	13,927	14,347	14,649	14,920
Zone 12	10,979	11,260	11,589	11,873	12,074
Total	76,829	78,945	81,226	83,100	84,703

Source: Experian MMG3 population projections for 2019 - 2038 and extrapolated to 2039

Table 9: Truro Catchment Comparison Goods Expenditure per person (£)

Zone	2020	2024	2029	2034	2039
Zone 9	3,419	3,740	4,209	4,796	5,508
Zone 10	3,545	3,878	4,364	4,972	5,710
Zone 11	3,588	4,004	4,506	5,134	5,896
Zone 12	3,581	3,996	4,497	5,124	5,885

Source: Experian Local Expenditure 2018 (2018 prices) and growth rates.

Table 10: Truro Catchment Total Comparison Goods Expenditure (£m)

Zone	2020	2024	2029	2034	2039
Zone 9	£73.18	£82.54	£96.01	£112.34	£131.96
Zone 10	£109.51	£122.89	£141.74	£164.84	£192.72
Zone 11	£48.64	£55.76	£64.65	£75.21	£87.97
Zone 12	£39.32	£44.99	£52.12	£60.84	£71.06
Total	£270.64	£306.19	£354.51	£413.23	£483.70

Source: Tables 8 and 9

Appendix 4 Food & Beverage Impact

Table 1: Local Catchment Area Population

Zone	2020	2024	2029	2034	2039
Garden Village	0	1,417	3,693	6,526	8,165
0 to 2 km catchment	4,653	4,792	4,956	5,094	5,259
Total	4,653	6,209	8,649	11,620	13,424

Source: Experian MMG3 population projections for 2020 - 2038, data for 2039 has been extrapolated. Langarth Garden Village 3,550 homes @ 2.3 people per home = 8,165 people

Table 2: Local Catchment Food & Beverage Expenditure per person (£)

	2020	2024	2029	2034	2039
0-2 km catchment	1,292	1,353	1,431	1,512	1,597

Source: Experian Local Expenditure 2018 (2018 prices) and growth rates.

Table 3: Local Catchment Total Food & Beverage Expenditure (£m)

	2020	2024	2029	2034	2039
Garden Village	£0.00	£1.92	£5.28	£9.87	£13.04
0 to 2 km catchment	£6.01	£6.48	£7.09	£7.70	£8.40
Total	£6.01	£8.40	£12.38	£17.57	£21.44

Tables 1 and 2.

Table 4: Food & Beverage Expenditure Retention (% Market Shares)

	Langarth Garden Village (1)	0 to 2 km catchment (2)	Inflow from beyond 0 to 2 km catchment
% expenditure retained at Garden Village	50%	35%	40%

Table 5: Food & Beverage Expenditure Retained (£m)

By year	Langarth Garden Village (1)	0 to 2 km catchment (2)	Inflow from beyond 0 to 2 km catchment	Total
2020	0.00	2.10	1.40	3.51
2024	0.96	2.27	1.51	4.74
2029	2.64	2.48	1.65	6.78
2034	4.93	2.70	1.80	9.43
2039	6.52	2.94	1.96	11.42

Tables 3 and 4.

Table 6: Food & Beverage Floorspace Capacity

By year	Available expenditure £m	Turnover density new floorspace £psm gross	Floorspace capacity sq.m gross
2020	3.51	5,000	701
2024	4.74	5,101	929
2029	6.78	5,230	1,296
2034	9.43	5,362	1,758
2039	11.42	5,497	2,077

Source: Table 5.

Table 7: Truro Catchment Area Population

Zone	2020	2024	2029	2034	2039
Zone 9	21,404	22,070	22,811	23,424	23,958
Zone 10	30,890	31,688	32,479	33,154	33,751
Zone 11	13,556	13,927	14,347	14,649	14,920
Zone 12	10,979	11,260	11,589	11,873	12,074
Total	76,829	78,945	81,226	83,100	84,703

Source: Experian MMG3 population projections for 2020 - 2038 and extrapolated to 2039

Table 8: Truro Catchment F&B Expenditure per person (£)

Zone	2020	2024	2029	2034	2039
Zone 9	1,243	1,301	1,377	1,454	1,536
Zone 10	1,382	1,447	1,532	1,618	1,709
Zone 11	1,358	1,422	1,505	1,589	1,679
Zone 12	1,329	1,397	1,478	1,561	1,649

Source: Experian Local Expenditure 2018 (2018 prices) and growth rates.

Table 9: Truro Catchment Total Convenience Goods Expenditure (£m)

Zone	2020	2024	2029	2034	2039
Zone 9	£26.61	£28.71	£31.41	£34.06	£36.80
Zone 10	£42.69	£45.85	£49.76	£53.64	£57.68
Zone 11	£18.41	£19.80	£21.59	£23.28	£25.05
Zone 12	£14.59	£15.73	£17.13	£18.53	£19.91
Total	£102.30	£110.10	£119.89	£129.51	£139.44

Tables 7 and 8.

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