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Cornwall Retail Study Update 2015

Cornwall Council

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1. Introduction

Scope and Purpose

- 1.1 In November 2010, the Cornwall Retail Study ('the 2010 study'), prepared by GVA for Cornwall Council ('CC') was published. The 2010 study provided CC with comprehensive evidence base material on town centre and retail issues across Cornwall, including indicators of town centre health, shopping patterns for food and non-food goods, an assessment of the need for additional retail floorspace in all of the key settlements in Cornwall and an assessment of potential retail development sites.
- 1.2 Since the completion of the 2010 study, a number of the factors which influenced the findings of that study have been subject to change. These include the effects of the severe economic downturn, the potential for a change in local shopping patterns, the development of new retail floorspace across Cornwall and the decision of CC to grant planning permission for further retail floorspace. In order to set the context for the recent changes in the UK economy insofar as they relate to retailing and town centre issues, we provide a summary note at Appendix B to this report.
- 1.3 As a consequence of these factors, CC has taken the decision to commission a partial update to the 2010 study and GVA has been instructed to prepare this Retail Study Update which focuses upon an updated assessment of quantitative need (i.e. retail expenditure capacity) to support new retail floorspace in the main settlements across Cornwall.
- 1.4 In addition, the National Planning Policy Framework ('NPPF') has been published since the completion of the 2010 study and Section 2 of the NPPF notes that local planning authorities should *"allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability"*.
- 1.5 This study, to be referred to as 'the Retail Study update', concentrates upon the assessment of quantitative need for retail floorspace in Cornwall and provides an update to the contents of part of Section 5, appendices Q-T and technical

appendices 1-4 of the 2010 study. It provides an assessment of the available retail expenditure to support convenience and comparison goods floorspace in Cornwall's main settlements. In order to do this, our assessment incorporates updated shopping patterns survey, expenditure, population and company average performance data.

- 1.6 The results of this study will be taken forward by CC in the development of the Cornwall Local Plan and evidence to inform any emerging Neighbourhood Plans, including the identification of retail development sites in each settlement.
- 1.7 In relation to data on shopping patterns, the 2010 study utilised the results of a survey undertaken in 2008. The results of that survey were, at the time of commencing this latest study¹, six years old and were becoming out of date, particularly in light of new store openings and changing shopping habits particularly in relation to comparison goods. Therefore, CC took the decision to commission a new survey of household shopping patterns for the Retail Study update. The survey, whose parameters are explained in the next section of this report, provides updated information on convenience and comparison goods shopping patterns across Cornwall.

Contents of Report

- 1.8 The remainder of this report is structured in the following manner:
- Section 2 outlines the various data sources that have been used in the preparation of the updated quantitative need forecasts, including the new shopping patterns survey, population and expenditure data.
 - In Section 3 we outline the results of our quantitative need assessment, examining the potential for additional convenience and comparison goods floorspace in each of the main settlements across Cornwall.
 - Finally, in Section 4, we provide a summary of the results of our assessment.
- 1.9 All documents and statistical information referred to in the text of this report can be found in appendices at the rear of this document.

2. Basis for the Updated Impact Assessment

Introduction

- 2.1 This section outlines the various assumptions and data inputs which have been adopted within our updated quantitative need forecasts, including (where applicable) their source and/or justification.

The Structure of the Quantitative Assessment Tables (Appendices C-Q)

- 2.2 The set of quantitative need assessment tables informing this study are contained in appendices C to Q at the rear of this report. Appendix Q provides the baseline quantitative assessment tables, which are structured in the following manner:

- Table 1 – population forecasts
- Table 2 – per capita expenditure forecasts
- Table 3 – total available retail expenditure forecasts
- Table 4 – market share of convenience shopping facilities
- Tables 5a-5d – study area derived turnover of convenience facilities
- Table 6 – market share of comparison shopping facilities
- Tables 7a-7d – study area derived turnover of comparison facilities
- Table 8 – benchmark turnover of convenience goods facilities in Cornwall
- Table 8b – committed convenience and comparison goods floorspace in Cornwall

- 2.3 Appendices C to P provide the individual retail quantitative need/capacity tables for each key settlement, for both convenience and comparison goods shopping facilities. For example, Appendix C provides the convenience and comparison goods floorspace assessments for Falmouth and Penryn, whilst Appendix D provides the same format of information for Bodmin. Within each appendix the table with the prefix '9'

¹ Autumn 2014

provides the convenience goods floorspace assessment, whilst the table with the prefix '10' provides the comparison goods floorspace assessment.

Study Area

- 2.4 In order to provide consistency with the 2010 Study, we have used the same study area as the previous assessment. This area is shown on the plan at Appendix A and is split into 26 zones covering different parts of Cornwall and the western parts of Devon.

Forecasting Dates

- 2.5 The start date for this quantitative assessment is 2014 (the year in which the latest shopping patterns information was obtained) and, for the future, we have prepared forecasts for 2019, 2024 and 2030, in order to cover the period for the Cornwall Local Plan.

Catchment Population

- 2.6 Data from the 2011 Census has been obtained for each of the postcode sectors which form the 26 zones in the study area and has been projected forward using forecasts supplied by CC (and which conform to the house building projections being used in the emerging Cornwall Local Plan).

Price Basis

- 2.7 All monetary values in this report are in constant 2013 prices, unless otherwise stated, so as to exclude the effects of price inflation.

Per Capita Expenditure

- 2.8 For this updated assessment, we have obtained up-to-date estimates of per capita retail expenditure on convenience and comparison goods from Experian, for each of the study area zones. The data which has been obtained is for the year 2013, expressed in 2013 prices.

2.9 In order to bring the per capita spending levels up to the base year for the assessment (2014) and then across the assessment period (2014-2030) we have followed these assumptions²:

- Convenience goods expenditure.

- 2014 = -0.5% pa
- 2015 = +0.5% pa
- 2016 = +0.4% pa
- 2017-2021 = +0.6% pa
- 2022-2030 = +0.6% pa

- Comparison goods expenditure.

- 2014 = 5.6% pa
- 2015 = 4.4% pa
- 2016 = 3.1% pa
- 2017-2021 = 3.1% pa
- 2022-2030 = 3.3% pa

2.10 These forecasts have been provided by Experian in their Retail Planner Briefing Note 12.1 (2014).

2.11 Per capita expenditure data for convenience goods shopping and the seven different categories of comparison goods shopping are contained in Table 2 at Appendix Q.

Shopping Patterns in the Study Area

2.12 As set in Section 1 of this report, a new survey of household shopping patterns has been commissioned for this assessment. The reasons for commissioning a new comprehensive survey are based on the age of the previous survey (conducted in

² The % change forecasts listed in this paragraph are annual changes based upon the change from the previous year.

2008, this now several years old) and the potential for shopping patterns to have changed due to the influence of new retail development and the changing influence of internet shopping, as set out in the note at Appendix B to this report.

2.13 The survey has been structured in order to obtain information on the following types of shopping in the 26 area zones:

- For convenience (food) goods shopping, separate information on main food and top-up food shopping trips has been obtained.
- Comparison goods shopping has been split up into seven different categories (to match the 2008 study) including: clothes/shoes, furniture/floorcoverings, DIY, textiles, domestic appliances, smaller electrical goods, personal and luxury goods, and recreation goods. Separate shopping patterns information has been obtained for each of these categories.

2.14 The 'raw' shopping patterns information from the household survey has been summarised and arranged into the main settlements across Cornwall. This 'summarised' information is contained within Table 4 at Appendix Q for convenience goods shopping and Table 6 at Appendix Q for comparison goods shopping.

2.15 In order to show the influence of the internet on shopping patterns across Cornwall, the household survey results have not been amended to exclude this type of shopping behaviour.

2.16 Within Table 4 (Appendix Q) the market shares for stores in each of the main settlements have been grouped together, with main food and top-up food shopping market shares within each of the 26 study area zones shown separately. Tables 5a to 5d turn the market share levels into study area derived turnover estimates by applying the market shares in Table 4 to the total available expenditure estimates in Table 3 (Appendix Q) for each zone. In order to take account of the split between main food and top-up food expenditure, we have applied a split of 70%/30%.

2.17 2014 study area derived turnover levels are shown in Table 5a, with 2019, 2024 and 2030 turnover levels shown in Tables 5a-5d. For the avoidance of doubt, it should be noted that the study area derived turnover levels in Tables 5a-5d for 2019-2030 are based on constant market shares although in reality some of these levels may change when

committed retail floorspace begins trading. Therefore, Tables 5b-5d should only be seen as the starting point for the quantitative assessment.

- 2.18 A similar approach is taken in relation to comparison goods shopping, with Table 6 showing the market shares of the main settlements in Cornwall. Table 6 is arranged to show the market share for each settlement for each comparison goods category in each of the 26 study area zones.
- 2.19 Using a similar approach to the convenience goods assessment, Tables 7a-7d translate the market shares in Table 6 into study area derived turnover levels for each settlement, broken down into the seven comparison goods categories.

Visitor Expenditure from outside the Catchment Area

- 2.20 In line with the approach taken in the 2010 study, an allowance has been made for spending at retail facilities in Cornwall by visitors travelling from outside of the study area. In our view, this is a reasonable approach to take given the attractiveness of Cornwall as a visitor/tourist destination. In the interests of consistency, our latest assessment adopts the same assumptions as the 2010 study.

Existing Shop Floorspace

- 2.21 In order to update the 2010 study, we have obtained the latest town centre floorspace data for all of the main town centres in Cornwall from Experian GOAD data³. Using this data, along with data from IGD⁴ and planning application records, we provide separate floorspace data for the main foodstores and supermarkets in each settlement, along with other convenience goods floorspace in the main town centres.

Sales Densities & Benchmark Turnover Levels

- 2.22 A key component of the quantitative assessment of retail floorspace is the need to set benchmark turnover levels. Benchmark turnover levels are generally either reflective of either company average turnover levels or, where specific data is not known, an average trading performance of a particular retail sector. They are reflective of average or normal trading conditions and are used in a comparison against actual

³ Experian undertake regular land use surveys of city and town centres across the UK and publish the findings of these surveys in their GOAD plans. Examples of these plans can be found in appendices to the 2010 study.

trading performance levels. Therefore, where actual turnover levels are above these 'benchmark' levels, this will result in 'surplus' expenditure being made available to accommodate additional retail floorspace⁵.

- 2.23 For our quantitative assessment of convenience goods floorspace, the benchmarking exercise is the more straight-forward of the two assessments, as the sector is concentrated amongst the main grocery operators and specific company average sales data is available for these businesses. Sales performance levels for the main grocery operators are published on an annual basis, thus allowing the estimates in the 2010 study to be superseded by the latest 2014 published estimates. We have applied the latest estimates of company average performance levels (£/sq m) provided by Verdict Research and these are based on the average performance level of each retailer's convenience goods floorspace stock, rather than its overall retail floorspace offer.
- 2.24 For other convenience floorspace across Cornwall's town centres, we have applied our own estimated densities based upon a reasonable average of the likely performance of smaller convenience goods retailers in this sector.
- 2.25 For comparison goods floorspace, the use of benchmark turnover levels is much less straight-forward as there are many more retailers and many for which there is no published information. Therefore, a choice exists between choosing a general average benchmark turnover for all comparison goods floorspace in a particular settlement or, based upon the trading characteristics of a particular settlement, making an assumption that at the starting year of a capacity assessment, demand equals supply (i.e. expenditure demand is equivalent to floorspace supply) . This latter approach is known as 'the equilibrium approach' and effectively eliminates any initial under or over capacity at the start of the assessment and thus restricting the potential for future capacity to future changes in population and expenditure growth.
- 2.26 Within the 2010 study, we adopted an equilibrium approach for comparison goods capacity in most towns. We adopted this approach on the basis that the 2010 study
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⁴ Institute of Grocery Distribution, who have undertaken research on the size of grocery stores across the UK.

⁵ By way of an example, if the collective benchmark turnover of retail facilities in a particular town is £100m and the actual turnover of these facilities is £110m, then the retail capacity model classifies this positive (£10m) difference as surplus expenditure and makes it available to support new floorspace in that town.

was the first Cornwall-wide study and the first study to utilise a Cornwall-wide survey of comparison shopping patterns. An equilibrium approach was also adopted where there was no evidence of significant under or over-trading within comparison goods floorspace in the main settlements. Due to the lack of any such evidence, an equilibrium approach was applied, although the exception was Truro where there has been evidence of a very good level of trading performance over a number of years which led the 2010 study to set a benchmark turnover level which was below the actual trading performance of comparison goods floorspace within the city.

2.27 An important question for this study is therefore whether to return to the equilibrium approach for the starting assessment year of 2014 (i.e. benchmark turnover in 2014 is the same as current 2014 turnover levels) or whether to link the benchmark turnover in this latest assessment back to the benchmark used in the 2010 study. In order to inform this exercise we have examined the change in both the annual turnover and comparison goods floorspace levels over the period between the previous study (and its household survey) and the latest set of evidence base data.

2.28 For example, where there has been a similar change (or no change) in the level of floorspace and comparison goods turnover in a particular settlement, then there is merit in remaining with the equilibrium approach (i.e. current actual turnover equals current benchmark turnover) as there remains parity between the demand and supply elements. Conversely, where there has been a divergence between turnover and floorspace (i.e. floorspace has remained static yet turnover has fallen) there is merit in remaining with the benchmark turnover used in the 2010 study which would be higher than the actual current turnover of stores. This allows the strategy to adapt its approach to support those settlements which have lost trade since the 2010 study by building in an allowance to ring-fence expenditure growth for these existing businesses until such a time as they collectively reach the assumed benchmark turnover level.

2.29 The approach which has been adopted for each settlement is explained below.

Commitments

2.30 In the 2010 study, account was taken of a number of retail commitments across Cornwall. Many of these commitments are now trading and their influence over convenience and comparison goods shopping patterns will be accounted for in the 2014 household survey. However, since the completion of the 2010 study a large number of new retail commitments have been granted planning permission by CC.

Table 8b at Appendix Q lists these commitments, which are broken down into convenience and comparison goods floorspace.

- 2.31 In many instances, the commitments which benefit from planning permission are clearly defined in terms of the amount of convenience and/or comparison goods floorspace they can provide. However, in some other instances, permission has been granted (in outline or in full) for Class A retail floorspace which is not restricted in terms of the range of goods which can be sold for the ability to be used as either Class A1 or another type of Class A uses (i.e. A2/3/4/5). In such instances, we have included an allowance for this flexible space in both the convenience and comparison goods commitments. This, of course, could be seen as double-counting, as the level of capacity for both convenience and comparison goods floorspace is reduced for each salient settlement. However, this approach ensures that our capacity assessment is not over-optimistic regarding the amount of floorspace capacity in any given settlement.
- 2.32 Finally, there may be, in some instances, the possibility that a particular commitment may still have an extant planning permission but there is little prospect of it being implemented. An example of this may be the Sainsburys commitment in Falmouth or the Tesco extension commitment in St Austell. Whilst it would be incorrect to completely exclude the commitment from our analysis (as circumstances may change prior to the expiry of each permission), we have, where appropriate, provided an alternative quantitative need scenario for the relevant settlements.

3. Updated Quantitative Retail Floorspace Capacity Forecasts

Introduction

3.1 This section outlines the results of our assessment of the quantitative need for additional convenience and comparison goods retail floorspace in the main settlements across Cornwall. The quantitative assessment is contained in Appendices C-Q to this report and is based upon the following step-by-step methodology:

- Definition of a study area for the assessment (shown on the plan at Appendix A);
- Calculation of 2014 population and expenditure levels within the study area and a forecast future population and expenditure growth up to 2030;
- Calculation of the turnover of retail facilities within the study area using a market share analysis based on shopping patterns information gathered by the 2014 household survey;
- Assessment of the capacity for future retail floorspace using a market share approach. This involves the assumption that retail floorspace in the main settlements will achieve a particular market share of available expenditure within the study area as a whole. From this level of available expenditure, we then subtract the benchmark turnover of existing facilities and retail commitments to derive a residual figure for convenience and comparison goods retail expenditure.

3.2 In order to turn the level of residual expenditure in each settlement into a floorspace capacity equivalent, an indicative sales density for convenience and comparison goods floorspace is adopted. The density which has been adopted is a notional figure for new floorspace and is not specific to a particular retailer or type/style of operator. For convenience goods floorspace, a density of £12,000/sq m is adopted⁶, and which

⁶ Which is based upon an average of the main national grocery operators (ASDA, Tesco, Morrisons, Sainsburys and Waitrose)

changes over time depending upon the assumptions used for changes in floorspace efficiency. For comparison goods floorspace, the density which has been adopted is £5,000/sq m⁷, again changing over time depending on changes in floorspace efficiency.

3.3 It is important to note, therefore, that the floorspace capacity levels in Tables 9 and 10 at Appendices C-P are indicative only and reference should be made to specific store turnover levels when allocating sites and determining planning applications.

3.4 A further area to note is that the floorspace capacity estimates outlined in this section are based upon constant market share levels, after the impacts of commitments have been taken into account. The contents of this report provide further explanation as to the possibilities of changing the market share of individual settlements, although any further assessment of changing market shares should be undertaken as and when potential development sites and development proposals are considered. Moreover, the floorspace capacity levels outlined below are indicative and are based upon indicative sales density levels for convenience and comparison goods floorspace. These capacity levels can be refined as and when more detailed proposals come forward.

Falmouth & Penryn (Appendix C)

3.5 Within the 2010 study, the quantitative assessment found that the supply of convenience goods expenditure in the Falmouth and Penryn area was reasonably commensurate with demand at 2009-2014, with small levels of growth in capacity up to 2031. Table 9a at Appendix C indicates that there is now no surplus convenience goods floorspace capacity in Falmouth/Penryn over the whole of the assessment period. The reason for this is the effect of granting planning permission for a replacement Sainsburys store and a new Lidl discount foodstore. The introduction of both of these stores would eliminate the need to plan for any new convenience goods floorspace up to 2030.

⁷ Based upon a reasonable sales density for new comparison goods floorspace in high street locations

3.6 Given the current issues affecting the UK grocery sector, there is the possibility that Sainsburys will not close their existing store⁸ and build a much larger replacement on an adjacent site. We have tested this eventuality and should it occur then there would be a small level of surplus capacity of 400sq m net at 2019, rising to 900sq m at 2024 and 1,500sq m net by 2030. This is still a modest level of capacity and is not sufficient to allow CC to allocate land for an additional store in the Falmouth and Penryn area.

Table 3.1: floorspace capacity (sq m net)- Falmouth & Penryn

| 2010 Study | 2014 | 2021 | 2026 | 2031 |
|-------------|-------|-------|-------|------|
| Convenience | 101 | 520 | 813 | 1149 |
| Comparison | 1260 | 4249 | 6570 | 9243 |
| 2015 Study | 2014 | 2019 | 2024 | 2030 |
| Convenience | -2215 | -1164 | -610 | -10 |
| Comparison | -9559 | -4246 | -2249 | 328 |

Source: Tables 9a and 10a, Appendix C

3.7 In the 2010 study, an equilibrium approach to the assessment of comparison goods floorspace capacity was adopted and growth in available comparison goods expenditure after 2009 contributed to the capacity for additional floorspace up to 2031.

3.8 In order to consider whether we should link the latest analysis back to the benchmark used in the 2010 study, or assume that floorspace and expenditure should revert back to an equilibrium level at 2014, we have examined the change in floorspace/units and comparison goods turnover levels between 2009 and 2014. This has found that the amount of comparison goods floorspace and units have remained relatively static over this period but the amount of comparison goods turnover has reduced below the level that the 2010 study thought the area would achieve by 2014. As a consequence, we have decided to retain the benchmark turnover level from the 2010 study and update it to be 2014 base.

3.9 As shown in Table 10a at Appendix C the use of the (updated) previous benchmark turnover level, plus the inclusion of commitments, means that there is a current over-

⁸ Which was converted from the former Co-op store

supply of comparison goods floorspace in the Falmouth and Penryn area. The scale of over-provision, based on these two factors, is such that surplus capacity will only return by 2030. The ability to increase in capacity in the shorter term will therefore be dependent upon increasing Falmouth and Penryn's market share, which could have the knock-on effect of affecting capacity levels in other nearby settlements.

- 3.10 In line with the convenience goods floorspace assessment, we have also considered what would happen if the permission to open a replacement (larger) Sainsburys store and convert the existing Sainsburys store to bulky goods floorspace is not implemented. In such a scenario, surplus capacity would arise earlier in the assessment, although this would only be 500sq m net at 2024 and then rising to 2,650sq m net by 2030. Given that this capacity is only significant at 2030 and that this is some 15 years into the future, we do not recommend that the Council allocates land to meet this capacity as future changes in circumstances could affect this level.

Bodmin (Appendix D)

- 3.11 Within the previous 2010 study, there was forecast to be limited capacity for additional convenience goods expenditure in Bodmin. This was influenced by the presence of three supermarkets (ASDA, Sainsburys and Morrisons) plus a commitment for a Lidl discount foodstore on the former Police station site to the east of the town centre. Our latest assessment indicates that the situation has not changed, with the potential over-supply of convenience goods floorspace becoming greater due to the impact of a commitment for additional retail floorspace on Dunmere Road and also the influence of commitments for new convenience goods floorspace in Wadebridge. As Table 3.2 below shows, there will not be any surplus capacity for additional convenience goods floorspace in Bodmin between 2014 and 2030.

Table 3.2: floorspace capacity (sq m net) – Bodmin

| 2010 Study | 2014 | 2021 | 2026 | 2031 |
|-------------|------|-------|-------|------|
| Convenience | -571 | -136 | 164 | 497 |
| Comparison | 391 | 2422 | 3964 | 5792 |
| 2015 Study | 2014 | 2019 | 2024 | 2030 |
| Convenience | -609 | -1576 | -1113 | -591 |
| Comparison | -480 | -1154 | -58 | 1364 |

Source: Tables 9b and 10b, Appendix D

- 3.12 In the 2010 study, an equilibrium approach for comparison goods floorspace capacity was adopted for Bodmin. This led to a modest level of capacity in the short term but growing to a reasonably substantial level by 2026-2031. Within our latest assessment, we have continued with the equilibrium approach as both floorspace/units and comparison goods turnover have fallen in Bodmin between 2009 and 2014. The result of our assessment finds that capacity has fallen, due to the potential for the commitment on Dunmere Road to sell comparison goods, plus the effect that commitments in Wadebridge and Newquay will have on expenditure levels within Bodmin. As Table 4.2 above, plus Table 10b at Appendix D, shows, the potential for comparison goods capacity in Bodmin is eliminated until 2030 unless Bodmin's market share in the wider catchment can be raised.

Penzance (Appendix E)

- 3.13 The 2010 study outlined the quantitative capacity for a modest amount of new convenience goods floorspace in the Penzance and Newlyn area in the short to medium term, rising to 2,000sq m by 2026 and 2,400sq m by 2031. This surplus capacity has now been eliminated, as Table 3.3 below and Table 9c at Appendix E show, due to the opening of the new Sainsburys store and also the effect of the new ASDA supermarket in Hayle (which has clawed back some convenience goods expenditure which was previously flowing from the Hayle area to stores in Penzance). Based upon our latest assessment, there is now no surplus capacity in the Penzance and Newlyn area until after 2024 and this will be at relatively modest levels.

Table 3.3: floorspace capacity (sq m net)– Penzance

| 2010 Study | 2014 | 2021 | 2026 | 2031 |
|-------------|-------|-------|-------|-------|
| Convenience | 1337 | 1773 | 2080 | 2371 |
| Comparison | 2160 | 6322 | 9558 | 13141 |
| 2015 Study | 2014 | 2019 | 2024 | 2030 |
| Convenience | -571 | -478 | 141 | 821 |
| Comparison | -4776 | -3914 | -1951 | 579 |

Source: Tables 9c and 10c, Appendix E

- 3.14 In a similar manner, the amount of comparison goods floorspace capacity in the Penzance and Newlyn area has also significantly reduced. This is due to three main factors. First, the lower expenditure growth rates will decrease the amount of additional expenditure which is available to existing and new retailers in the future.

Second, whilst there has been a fall in both comparison floorspace/units and turnover levels in Penzance, the fall in turnover has been greater. Therefore, our latest capacity assessment is based upon the previous benchmark turnover for Penzance/Newlyn but reduced by 10% to allow for the fall in floorspace/units. Third, there have been a number of commitments that will impact upon surplus expenditure in the local area. These are the new Range store at Long Rock, plus the effects of new comparison goods floorspace in Hayle.

- 3.15 As a consequence, the previous comparison goods floorspace capacity has been eliminated and a modest amount of surplus capacity only returns at 2030 (circa 600sq m net).
- 3.16 The ability to provide further comparison goods floorspace can be enhanced by an increase in the area's market share should a suitable town centre site come forwards. However, the ability to increase Penzance's market share and provide new comparison goods floorspace will be significantly affected by the grant of planning permission for either of the two current large non-food proposals at Marsh Lane in Hayle.

Liskeard (Appendix F)

- 3.17 Within the 2010 study, a reasonably high level of quantitative capacity for convenience goods floorspace in Liskeard was identified. This was primarily driven by the successful trading performance of the out of centre Morrisons store, which was trading well above its national company average. Since the 2010 study, permission has been granted for an extension to the Morrisons store, whilst we have also allowed for the potential of a convenience goods store at Barras Place in the town centre. In addition, surplus capacity levels in Liskeard could also be affected by the new Tesco store in Saltash and the new Morrisons store in Launceston. Finally, there has also been the opening of a new ALDI discount store which will have further increased the supply of floorspace in Liskeard.
- 3.18 As a consequence, Table 3.4 below shows that surplus capacity levels for convenience goods floorspace have fallen to 1,000sq m net at 2014 and then rising very slowly to 1,150sq m by 2026 and 1,500sq m net by 2030. Based upon these levels of capacity, the case for a new supermarket in Liskeard has weakened, although it remains the

case that additional provision should be provided within the town centre in order to better compete with the out of centre Morrisons store.

Table 3.4: floorspace capacity (sq m net) – Liskeard

| 2010 Study | 2014 | 2021 | 2026 | 2031 |
|-------------|------|------|------|------|
| Convenience | 2584 | 2878 | 3057 | 3261 |
| Comparison | 1076 | 3084 | 4606 | 6341 |
| 2015 Study | 2014 | 2019 | 2024 | 2030 |
| Convenience | 1015 | 855 | 1157 | 1485 |
| Comparison | -740 | -333 | 919 | 2536 |

Source: Tables 9d and 10d, Appendix F

3.19 For comparison goods shopping, the 2010 study indicated a modest level of capacity in the short to medium term (circa 3,000sq m net by 2021). Our updated assessment, which continues to adopt an equilibrium approach for Liskeard⁹, indicates that surplus capacity will only arise by 2030. This is due to Morrisons store extension and Barras Place commitments in the town and also the small loss of market share due to commitments in Saltash¹⁰ and Launceston¹¹.

3.20 This level of longer-term capacity suggests that there is no need to allocation sites outside of Liskeard town centre for additional comparison goods floorspace, although this should not stop the Council encouraging new comparison goods floorspace within the town centre.

Wadebridge (Appendix G)

3.21 Since the 2010 study, the Council has granted permission for a new Sainsburys supermarket and an extension to the existing Tesco supermarket. In addition, permission has been granted for a retail development scheme on land to the south of Travelodge also includes an allowance for convenience goods floorspace. All of these three commitments have the potential to significantly reduce the amount of convenience goods floorspace capacity in the town. In addition, commitments in

⁹ Due to a small fall in both turnover and floorspace/units
¹⁰ New Tesco store and commitment at Parkway Industrial Estate
¹¹ New Morrisons store

Newquay and Camelford will also reduce the town's convenience goods shopping market share, which will have an impact on future capacity levels.

3.22 Table 3.5 below shows that the previously identified surplus capacity for convenience goods floorspace has now been eliminated due to the above factors.

3.23 At the present time, there is no sign of the implementation of the Sainsburys store or the Tesco extension. Should these be removed from the assessment then the over-supply of convenience goods floorspace in Wadebridge is eliminated although the level of surplus capacity (circa 400sq m net at 2030) does not suggest that an alternative allocation of space should be provided for in the Cornwall Local Plan and evidence to inform any emerging Neighbourhood Plans.

Table 3.5: floorspace capacity (sq m net) – Wadebridge

| 2010 Study | 2014 | 2021 | 2026 | 2031 |
|-------------|-------|-------|-------|-------|
| Convenience | 1361 | 1753 | 1988 | 2262 |
| Comparison | 737 | 2166 | 3212 | 4443 |
| 2015 Study | 2014 | 2019 | 2024 | 2030 |
| Convenience | -2738 | -2187 | -1852 | -1478 |
| Comparison | -3819 | -2777 | -1999 | -989 |

Source: Tables 9e and 10e, Appendix G

3.24 Table 4.5 also shows that the previously identified capacity for up to 4,400sq m net of new comparison goods capacity in Wadebridge by 2030 has also been eliminated. This is primarily due to the grant of planning permission for the Sainsburys store, Tesco extension and a significant amount of comparison goods floorspace on land to the south of Travelodge. There is now no need to plan for additional comparison goods floorspace in Wadebridge and, if implemented, these three permissions have the potential to have a large impact upon the town centre. Therefore, the focus should be on maintaining and enhancing the health of the town centre over the Local Plan period.

3.25 Like the convenience goods assessment, we have considered what would happen if the Sainsburys store and Tesco extension permissions were excluded from the capacity assessment. The result would be that the over-supply of comparison goods floorspace would be eliminated although there would be very little surplus capacity by 2030 (circa 100sq m net).

Helston (Appendix H)

- 3.26 At the time of preparing the 2010 study, a significant amount of new retail floorspace was being constructed in Helston: namely, the new Sainsburys store and the redeveloped Tesco store. These stores followed the opening of the Lidl discount store. As a consequence of this on-going change, a number of predictions were made regarding the future market share of the town for both convenience and comparison goods shopping.
- 3.27 For convenience goods shopping, our latest assessment confirms that the previous predictions were broadly correct with no significant surplus convenience goods expenditure capacity over the plan period. The latest assessment confirms that there will be modest capacity by 2024 (circa 500sq m net), rising to 900sq m net by 2030. Given the substantial amount of existing convenience goods floorspace within Helston at the present time, we see no need for the Council to plan for any additional floorspace up to 2030.

Table 3.6: floorspace capacity (sq m net) – Helston

| 2010 Study | 2014 | 2021 | 2026 | 2031 |
|-------------|------|------|------|------|
| Convenience | -689 | -348 | -139 | 89 |
| Comparison | -407 | 688 | 1491 | 2451 |
| 2015 Study | 2014 | 2019 | 2024 | 2030 |
| Convenience | -136 | 141 | 493 | 869 |
| Comparison | 0 | -325 | 134 | 721 |

Source: Tables 9f and 10f, Appendix H

- 3.28 A similar picture emerges for comparison goods floorspace, albeit that the 2014 survey suggests that the town has not been able to achieve the comparison goods market share that was predicted in the 2010 study. Previously, modest amounts of floorspace capacity were predicted, in the medium to longer term (i.e. 2026 onwards). The latest assessment¹² indicates that the impact of the new floorspace, plus some modest levels of trade diversion to commitments in other settlements, will reduce the amount of capacity to circa 700sq m net by 2030.

¹² Which is also based on an equilibrium approach due to a comparatively similar drop in floorspace and turnover

Camborne, Pool and Redruth ('CPR') (Appendix I)

- 3.29 With regards to the 2010 and latest assessments, there is very little difference in terms of the capacity for additional convenience goods floorspace in the CPR area. Previously, we predicted a capacity for an additional 1,000sq m net by 2031 and the latest assessment predicts a capacity for an additional 600sq m by 2030.
- 3.30 Capacity for additional convenience goods floorspace in CPR is constrained by a number of open A1 floorspace commitments in the Pool area, along with the impact that commitments in surrounding settlements will have on CPR's future market share. Should some or all of the commitments in Pool not come forward for convenience goods floorspace then the amount of surplus capacity will rise. For example, if all of the Pool commitments in Table 8b are ignored then capacity rises to circa 900sq m net at 2024 and 1,800sq m net at 2030.

Table 3.7: floorspace capacity (sq m net) – CPR

| 2010 Study | 2014 | 2021 | 2026 | 2031 |
|-------------|-------|-------|-------|-------|
| Convenience | -418 | 220 | 571 | 1064 |
| Comparison | 2367 | 6996 | 10389 | 14490 |
| 2015 Study | 2014 | 2019 | 2024 | 2030 |
| Convenience | -880 | -948 | -188 | 642 |
| Comparison | -7352 | -5906 | -3889 | 3348 |

Source: Tables 9g and 10g, Appendix I

- 3.31 Within the 2010 study, we adopted an equilibrium approach to comparison goods turnover levels at the 2009 base for the study. This led to a reasonably high level of comparison goods floorspace capacity across the period between 2014 and 2031. However, whilst both comparison floorspace/units and turnover have all fallen between 2009 and 2014, turnover levels have fallen faster and thus we have adopted the previous benchmark turnover level for CPR (minus a small reduction to account for the fall in floorspace/units). This benchmark, along with the impact of commitments in CPR and elsewhere has eliminated surplus floorspace capacity until after 2024.
- 3.32 The decision to adopt a higher benchmark turnover than existing (2014) turnover levels is a response to the falling turnover of stores in CPR and the need to offer some protection to these stores in the short to medium term. On this basis, including a

constant market share for CPR between 2019 and 2030, we consider that the surplus capacity will be circa 3,400sq m net by 2030.

- 3.33 Given the uncertainty over whether the open A1 retail floorspace in Pool will be occupied by comparison goods floorspace or other forms of retail use, we have considered a scenario where this floorspace is discounted. This increases capacity at 2030 to 4,000sq m net, although it does not change the situation whereby surplus capacity does not arise until after 2024.
- 3.34 The ability to provide further comparison goods floorspace can be enhanced by an increase in the area's market share should a suitable town centre site come forwards. However, the ability to increase CPR's market share and provide new comparison goods floorspace will be significantly affected by the grant of planning permission for either of the two current large non-food proposals at Marsh Lane in Hayle.

Newquay (Appendix J)

- 3.35 Within the 2010 study only a modest amount of convenience goods floorspace capacity in Newquay was identified. This was due to the presence of three supermarkets in the town, plus an ALDI discount foodstore. Within our latest assessment, the small amount of surplus capacity has been eliminated due to the grant of planning permission for a large amount of convenience goods floorspace within a mixed use development proposal at Trevithick Manor, plus a resolution to grant planning permission for a large supermarket within the Newquay Growth Area ('NGA') mixed use development.
- 3.36 Based upon the impact of these two proposals, plus the impact of convenience goods commitments in surrounding settlements¹³, there is now an over-supply of between 5,000-6,000sq m net of convenience goods floorspace in Newquay. As set out in our advice to CC on the Trevithick Manor and NGA proposals, there is likely to be a significant adverse impact upon the health of Newquay town centre should these proposals be implemented.

¹³ Wadebridge and St Columb Major

Table 3.8: floorspace capacity (sq m net) – Newquay

| 2010 Study | 2014 | 2021 | 2026 | 2031 |
|-------------|--------|--------|-------|-------|
| Convenience | -282 | 157 | 450 | 767 |
| Comparison | -497 | 1096 | 2267 | 3679 |
| 2015 Study | 2014 | 2019 | 2024 | 2030 |
| Convenience | -5895 | -5983 | -5497 | -4952 |
| Comparison | -20479 | -11099 | -9587 | -7637 |

Source: Tables 9h and 10h, Appendix J

- 3.37 A similar picture emerges in relation to comparison goods floorspace in Newquay, where the previous surplus has been turned into a potentially large over-supply. This is in part caused by a decision to retain the previous benchmark turnover and reduce it by 10% due to the higher fall in turnover than floorspace. The significant over-supply is due to four significant out of centre proposals: Trevithick Manor, the NGA, Treloggan Road and land adjacent to the existing Morrisons supermarket.
- 3.38 As set out in our advice to CC in relation to the Trevithick Manor, the NGA, Treloggan Road and land adjacent to the existing Morrisons proposals, these commitments will, whilst significantly boosting the amount of comparison goods floorspace in Newquay (and clawing back expenditure which is currently lost to Truro), have a significant adverse impact upon Newquay town centre.
- 3.39 Based upon the above findings, there is no need to plan for additional convenience and comparison goods floorspace in Newquay up to 2030 and, alternatively, the focus should be on supporting the health and attractiveness of Newquay town centre.

Launceston (Appendix K)

- 3.40 Within the 2010 study, a reasonably large amount of surplus capacity was identified for new convenience goods floorspace in Launceston. The amount of capacity was equivalent to a new medium-sized supermarket and was primarily driven by the very successful trading position of the out of centre Tesco store.
- 3.41 Within our latest assessment, capacity levels have reduced significantly in the short to medium term due to the grant of planning permission of a new Morrisons supermarket. There remains capacity for additional floorspace, including 1,200sq m net by 2019 and circa 2,000sq m net by 2030. Given the grant of permission for a new Morrisons store,

we do not consider that there is a need for the Council to plan for another out of centre allocation of convenience goods floorspace, although there remains a need to continue to protect and enhance the convenience goods sector in the town centre against the growing level of competition from out of centre floorspace.

Table 3.9: floorspace capacity (sq m net) – Launceston

| 2010 Study | 2014 | 2021 | 2026 | 2031 |
|-------------|-------|------|------|------|
| Convenience | 1876 | 2276 | 2539 | 2874 |
| Comparison | 937 | 2807 | 4239 | 5903 |
| 2015 Study | 2014 | 2019 | 2024 | 2030 |
| Convenience | 561 | 1215 | 1586 | 1993 |
| Comparison | -1082 | -111 | 918 | 2248 |

Source: Tables 9i and 10i, Appendix K

3.42 Capacity levels for comparison goods floorspace follow a similar pattern, with a reduction to the Morrisons supermarket commitment, commitments in other settlements affecting (to a small extent) Launceston's market share and also the general lower levels of expenditure growth. On this basis, and using an equilibrium approach (due to similar falls in turnover and floorspace), capacity for additional comparison goods floorspace in Launceston only arises after 2024, with circa 2,300sq m net of capacity by 2030. On this basis, and based upon a constant market share for Launceston, there is no need to plan for additional comparison goods floorspace within Launceston. Opportunities may exist to increase the town's comparison goods market share, although this can only be considered when specific details regarding sites and proposals are known.

Bude (Appendix L)

3.43 Since the completion of the 2010 study, permission has been granted for a mixed use development scheme at Binhamy Farm which includes a discount foodstore and a series of bulky comparison goods retail units. An application to replace this approved floorspace with a large supermarket was dismissed at appeal and we understand that Lidl will now occupy the approved discount foodstore unit.

3.44 Our updated assessment shows that there remains limited capacity for additional convenience goods floorspace in the Bude/Stratton area, with 300sq m net at 2019, rising to 600sq m by 2024 and 800sq m net by 2030. This is insufficient to justify an

allocation for additional floorspace in the development and should instead be used to expand and support existing stores (and create new smaller scale stores) in the town centre.

Table 3.10: floorspace capacity (sq m net) – Bude

| 2010 Study | 2014 | 2021 | 2026 | 2031 |
|-------------|-------|------|------|------|
| Convenience | 277 | 522 | 677 | 846 |
| Comparison | 555 | 1600 | 2391 | 3281 |
| 2015 Study | 2014 | 2019 | 2024 | 2030 |
| Convenience | 168 | 344 | 566 | 801 |
| Comparison | -2188 | -949 | -356 | 403 |

Source: Tables 9j and 10j, Appendix L

3.45 Due the committed comparison goods floorspace, along with the general changes in economic circumstances, the surplus capacity for additional comparison goods floorspace identified in the 2010 study has been eliminated for the period 2014-2024. There is a small amount of capacity, based upon constant market share levels, by 2030 (circa 400sq m net), although this is insufficient to justify the allocation of land for additional floorspace. As with some of the other settlements, capacity for additional comparison goods floorspace, or a widening of the product range which can be sold from committed development, can be created by an increase in the town's market share, although this will need to be tested against the impact upon the health of Bude town centre.

St Austell (Appendix M)

3.46 At the time of preparing the 2010 study, the major White River Place shopping centre in St Austell town centre was nearing completion and the survey, which underpinned the study, was undertaken prior to the opening of that scheme. Therefore, the 2010 study made a number of assumptions regarding the eventual trading performance of the completed scheme and how it would affect St Austell's market share for comparison goods.

3.47 As a consequence, whilst the town centre has seen a significant increase in the amount of comparison goods floorspace since the 2010 study (due to the opening of the White River Place scheme) and a loss in turnover (when compared with the predicted 2014 turnover for St Austell in the 2014 study), we have decided to follow an

equilibrium-based approach for comparison goods shopping capacity in the town (i.e. demand equals supply at 2014, the base year for the assessment).

- 3.48 The result of this exercise is that there has been a fall in the amount of forecast surplus comparison goods floorspace capacity¹⁴ in St Austell between 2014 and 2030/2031. The latest assessment, which takes into account a number of commitments including the Tesco extension at Holmbush and the approved Morrisons supermarket at Pentewan Road, indicates that surplus capacity will not arise until after 2019. This is based upon a constant market share for comparison goods shopping in the town and it is reasonable to suggest that an increased level of capacity (including the identification of surplus capacity in the shorter term) could be identified if the town were able to increase its market share in the study area.
- 3.49 Clearly, such an increase would need to be tested against the type, scale and location of potential new provision and, in line with the sequential approach to site selection, the town centre should be the first choice location for new provision.
- 3.50 It should also be noted that there is the potential that the Tesco extension commitment will now not be implemented. The same is possible for the Morrisons store on Pentewan Road, although the former looks to be the likely scheme to be dismissed. However, on the basis that both of these commitments are discounted, then comparison goods floorspace capacity in St Austell rises to 1,400sq m net at 2019, 4,000sq m net at 2024 and 7,400sq m net at 2030. Again, these capacity totals are based upon a constant market share for the town going forwards.

Table 3.11: floorspace capacity (sq m net) – St Austell

| 2010 Study | 2014 | 2021 | 2026 | 2031 |
|-------------|-------|-------|-------|-------|
| Convenience | 2385 | 3448 | 4143 | 4899 |
| Comparison | 1922 | 7505 | 11706 | 16629 |
| 2015 Study | 2014 | 2019 | 2024 | 2030 |
| Convenience | -1096 | -182 | 655 | 1584 |
| Comparison | -6400 | -2129 | 712 | 4388 |

Source: Tables 9k and 10k, Appendix M

3.51 Turning to convenience goods floorspace, our latest assessment predicts a significant fall in surplus capacity since the 2010 study which is unsurprising given the grant of planning permission to the Morrisons supermarket proposal on Pentewan Road, along with the loss of market share due to commitments in other settlements¹⁵. Surplus convenience goods floorspace capacity now only arises after 2019 and is at a modest level by 2024 (650sq m net), rising to 1,600sq m net by 2030. Given that these capacity levels only arise in the medium to longer term, along with the good quality of existing and committed floorspace in the town, we do not consider that there is a need for the Council to allocate further land for convenience goods floorspace outside of St Austell town centre.

Saltash (Appendix N)

3.52 As Table 3.12 below shows, there has been increase in the level of available convenience goods floorspace capacity in Saltash between the 2010 study and our latest analysis. However, the increase is small and mainly occurs towards the end of the assessment period. Whilst on face value this may seem perverse given the grant of planning permission for the Tesco supermarket on the edge of the town, other existing stores, such as Waitrose and Lidl have improved their collective performance which has in turn boosted the market share of the town. However, despite this improvement, surplus capacity remains modest and the capacity level at 2030 is 1,000sq m net. On this basis, and given the Tesco commitment and the good choice of convenience goods facilities available, we do not consider that there is a need to plan for any additional floorspace in Saltash.

¹⁴ Based upon an equilibrium approach, due the significant change in St Austell since the 2010 study and therefore the inability to sensibly link the benchmark turnover of the town back to the previous study.

¹⁵ Including Truro, St Columb Major and Newquay

Table 3.12: floorspace capacity (sq m net) – Saltash

| 2010 Study | 2014 | 2021 | 2026 | 2031 |
|-------------|-------|------|------|------|
| Convenience | -418 | -236 | -117 | 71 |
| Comparison | 199 | 619 | 940 | 1291 |
| 2015 Study | 2014 | 2019 | 2024 | 2030 |
| Convenience | -1084 | 441 | 719 | 1012 |
| Comparison | -2081 | -99 | 365 | 954 |

Source: Tables 9I and 10I, Appendix N

- 3.53 In contrast, the amount of capacity for additional comparison goods floorspace has decreased between the 2010 study and our latest analysis. Beyond the general decline in potential comparison goods floorspace capacity, the comparison goods element of the committed Tesco supermarket and a further commitment at Parkway Industrial Estate have also contributed to a lower capacity figure. Surplus comparison goods capacity now arises at 2024 and beyond, and equates to 1,000sq m net at 2030.
- 3.54 At this level, and given the timeframes involved, we do not recommend that the Cornwall Local Plan and the evidence informing the emerging Neighbouring Plans for an allocation for additional comparison goods floorspace in Saltash. However, a way of increasing comparison goods floorspace capacity is via an increase in the town's market share. This should be examined if suitable development sites are put forward, although consideration will need to be given to the realism of clawing back expenditure from nearby Plymouth and also the potential impact on the health of Saltash town centre.

Hayle (Appendix O)

- 3.55 Since the completion of the 2010 study, planning permission has been granted for a supermarket and other comparison goods floorspace at South Quay and Foundry Yard which lie adjacent to Foundry town centre in Hayle. The centre-piece of this scheme is the recently opened ASDA supermarket and the effect of this store has been to reduce the amount of available convenience goods floorspace capacity in the short to medium term. However, given that this store will significantly increase the market share

of Hayle, surplus capacity returns in the medium to longer term, with a floorspace capacity of circa 700sq m net by 2030. However, given the scale and choice of convenience goods floorspace within Hayle¹⁶, we do not consider that there is a need at the present time to plan for additional convenience goods floorspace in the town for the foreseeable future.

Table 3.13: floorspace capacity (sq m net) – Hayle

| 2010 Study | 2014 | 2021 | 2026 | 2031 |
|-------------|-------|------|------|------|
| Convenience | 369 | 498 | 578 | 667 |
| Comparison | 337 | 952 | 1416 | 1945 |
| 2015 Study | 2014 | 2019 | 2024 | 2030 |
| Convenience | -1971 | 134 | 394 | 677 |
| Comparison | -3172 | -270 | 632 | 1797 |

Source: Tables 9m and 10m, Appendix N

- 3.56 A similar picture emerges for comparison goods floorspace, which is based upon an equilibrium approach due to rises in both floorspace and turnover. The granting of permission for comparison goods floorspace in the ASDA supermarket and elsewhere at Foundry Yard substantially reduces short to medium capacity. However, due to the increase in market share that these commitments can provide, longer-term comparison goods floorspace in Hayle at 2030 returns to the 2031 level predicted by the 2010 study. However, given that this is mainly longer-term capacity, we do not recommend that, based upon a constant market share for Hayle, an allocation for new comparison goods floorspace is included in the development plan.
- 3.57 There does, however, remain the potential for a further increase in Hayle's market share, in a similar manner to that already achieved by the West Cornwall Retail Park. This issue is receiving consideration by the Council in relation to two planning applications for substantial open A1 comparison goods floorspace at Marsh Lane on the edge of Hayle. Whether this is a matter best handled through the development plan or development management processes is a matter for the Council to determine, although we are of the view that whilst a substantial amount of new comparison goods floorspace can increase Hayle's market share and provide the opportunity to attract

¹⁶ ASDA, Marks & Spencer, Co-op and Lidl

new retailers, it has the potential to provide a significant adverse impact upon some of the larger town centres in west Cornwall such as Camborne, Falmouth and Penzance and also affect the market share of other towns such as Helston and Redruth.

Truro (Appendix P)

- 3.58 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 2,800sq m net by 2031. Since the completion of the 2010 study 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.
- 3.59 Taking into account these commitments, along with the other updated survey and expenditure information, leads our updated quantitative assessment to conclude that there is currently no capacity for additional convenience goods floorspace in the Truro/Threemilestone area. By 2024, capacity will have risen to 500sq m net, followed by 1,400sq m at 2030.
- 3.60 This suggests that on the basis of the quantitative need forecasts, there is no need for the Council to plan for another supermarket in the Truro/Threemilestone area. Therefore, with on-going proposals for supermarkets in the Threemilestone area, the identification of any new convenience goods floorspace within the development plan will need to rely on a combination of both quantitative and qualitative factors, along with the need to ensure that a new store does not have a detrimental impact upon the convenience goods sector within Truro city centre. Indeed, whilst the Council's determination of the current supermarket proposals does not need to deal with a test of 'need' or 'capacity', the need to ensure that new provision does not have a significant adverse impact upon Truro city centre remains a central consideration.

Table 3.14: floorspace capacity (sq m net) – Truro

| 2010 Study | 2014 | 2021 | 2026 | 2031 |
|-------------|-------|-------|-------|-------|
| Convenience | 1054 | 1786 | 2227 | 2777 |
| Comparison | 17518 | 34144 | 46803 | 61206 |
| 2015 Study | 2014 | 2019 | 2024 | 2030 |
| Convenience | -1363 | -252 | 540 | 1415 |
| Comparison | 95 | -4957 | 3356 | 14121 |

Source: Tables 9n and 10n, Appendix P

- 3.61 Turning to the forecast level of quantitative capacity for new comparison goods floorspace in Truro, the 2010 study outlined a substantial level of capacity, as shown in Table 3.14 above. This level of capacity was based upon the continuation of the benchmark turnover level set by the 2008 DTZ Truro retail study and was also influenced by the scale of commitments and forecast expenditure growth at that time.
- 3.62 Since the 2010 study, the economic forecasts for retail expenditure have been amended and there have also been a number of new commitments for comparison goods floorspace in both Truro/Threemilestone and in other settlements whose residents have historically contributed to Truro's turnover level. This has resulted in significant reduction in the amount of floorspace capacity available to new comparison goods floorspace¹⁷ and is a sign of the increasing pressure that the city centre is under from development in both the local area and further afield.
- 3.63 Table 3.14 indicates that, due to the above factors, surplus capacity will only arise between 2019 and 2024, although in the longer term there is likely to be capacity for circa 14,000sq m (net) of new floorspace by 2030.

¹⁷ A capacity assessment which provides an updated benchmark turnover for the city which is in line with the 2010 study.

4. Summary and Conclusions

- 4.1 This report has been prepared by GVA for Cornwall Council ('CC') and provides a partial update to the 2010 Cornwall Retail Study ('the 2010 study') which was also prepared by GVA and published in November 2010.
- 4.2 The National Planning Policy Framework ('NPPF') notes that local planning authorities should *"allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability"*.
- 4.3 This study concentrates upon the assessment of quantitative need for retail floorspace in Cornwall and provides an update to part of the 2010 study, providing an assessment of the available retail expenditure to support convenience and comparison goods floorspace in Cornwall's main settlements.
- 4.4 The results of this study will be taken forward by CC in the development of the various Town Framework plans across Cornwall, including the identification of retail development sites in each settlement, and will also contribute to the on-going preparation of the Cornwall Local Plan.
- 4.5 From the outset, it should be noted that the capacity forecasts for convenience and comparison goods floorspace outlined below in Tables 4.1 and 4.2 are based upon constant market shares for each settlement after the impact of commitments has been taken into account. The contents of this report provide further explanation as to the possibilities of changing the market share of individual settlements, although any further assessment of changing market shares should be undertaken as and when potential development sites and development proposals are considered. Moreover, the floorspace capacity levels outlined below are indicative and are based upon indicative sales density levels for convenience and comparison goods floorspace. These capacity levels can be refined as and when more detailed proposals come forward.

Table 4.1 – convenience goods floorspace (sq m net) capacity levels in Cornwall, 2014-2030

| 2015 Study | 2014 | 2019 | 2024 | 2030 |
|-------------------|-------|-------|-------|-------|
| Falmouth / Penryn | -2215 | -1164 | -610 | -10 |
| Bodmin | -609 | -1576 | -1113 | -591 |
| Penzance | -571 | -478 | 141 | 821 |
| Liskeard | 1015 | 855 | 1157 | 1485 |
| Wadebridge | -2738 | -2187 | -1852 | -1478 |
| Helston | -136 | 141 | 493 | 869 |
| CPR | -880 | -948 | -188 | 642 |
| Newquay | -5895 | -5983 | -5497 | -4952 |
| Launceston | 561 | 1215 | 1586 | 1993 |
| Bude | 168 | 344 | 566 | 801 |
| St Austell | -1096 | -182 | 655 | 1584 |
| Saltash | -1084 | 441 | 719 | 1012 |
| Hayle | -1971 | 134 | 394 | 677 |
| Truro | -1363 | -252 | 540 | 1415 |

Table 4.2 –comparison goods floorspace (sq m net) capacity levels in Cornwall, 2014-2030

| 2015 Study | 2014 | 2019 | 2024 | 2030 |
|-------------------|--------|--------|-------|-------|
| Falmouth / Penryn | -9559 | -4246 | -2249 | 328 |
| Bodmin | -480 | -1154 | -58 | 1364 |
| Penzance | -4776 | -3914 | -1951 | 579 |
| Liskeard | -740 | -333 | 919 | 2536 |
| Wadebridge | -3819 | -2777 | -1999 | -989 |
| Helston | 0 | -325 | 134 | 721 |
| CPR | -7352 | -5906 | -3889 | 3348 |
| Newquay | -20479 | -11099 | -9587 | -7637 |
| Launceston | -1082 | -111 | 918 | 2248 |
| Bude | -2188 | -949 | -356 | 403 |
| St Austell | -6400 | -2129 | 712 | 4388 |
| Saltash | -2081 | -99 | 365 | 954 |
| Hayle | -3172 | -270 | 632 | 1797 |
| Truro | 95 | -4957 | 3356 | 14121 |

Appendix A:

Study area plan for 2014 household shopping survey

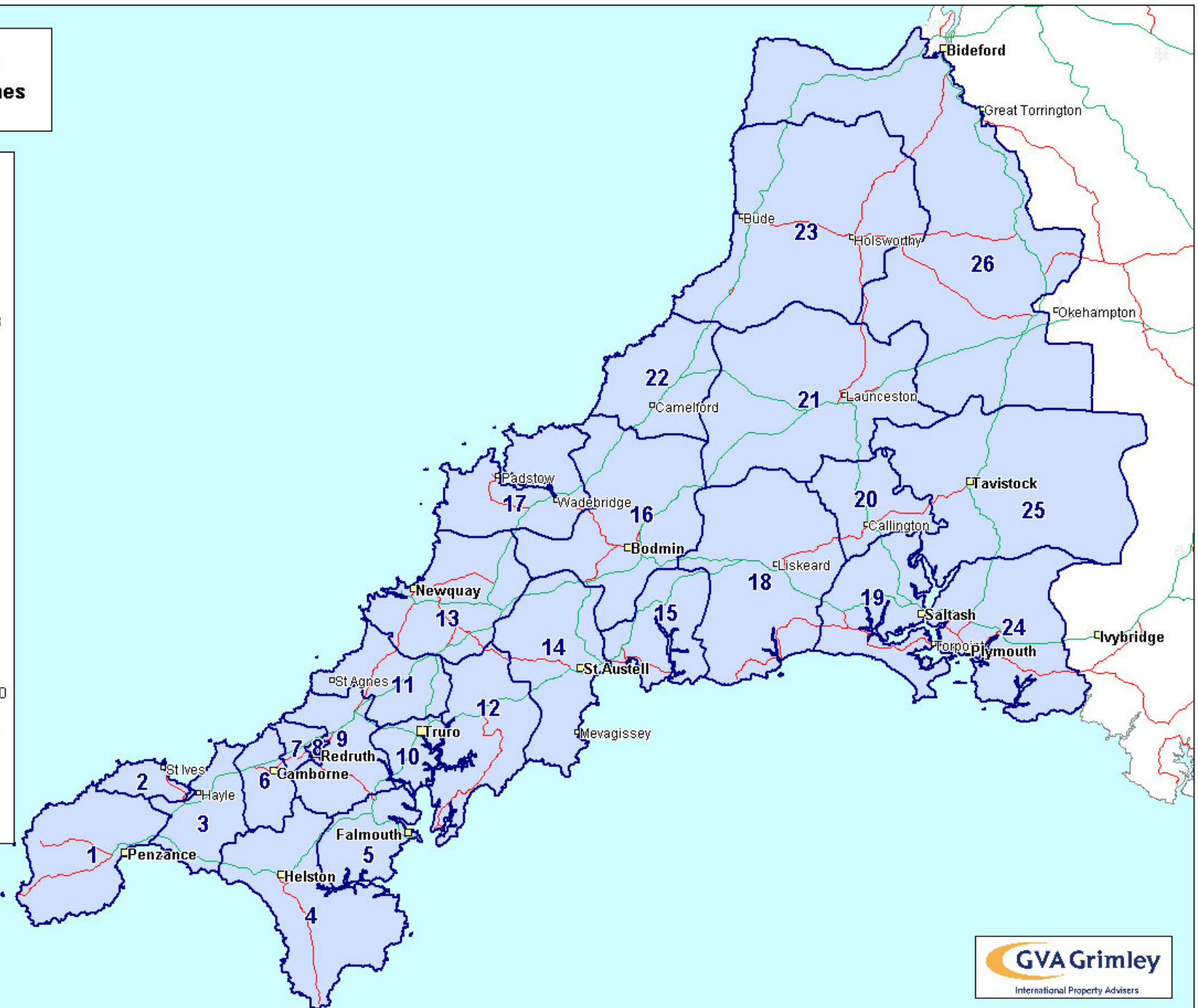
Cornwall Retail Study Study Area & Survey Zones

KEY

- Study Area
- Household Survey Zone

Zone Postal Sectors

| | |
|----|---|
| 1 | TR18 2/3/4/5, TR19 6/7, TR20 8 |
| 2 | TR26 1/2/3 |
| 3 | TR17 0, TR20 9, TR27 4/5/6 |
| 4 | TR12 6/7, TR13 0/8/9 |
| 5 | TR10 8/9, TR11 2/3/4/5 |
| 6 | TR14 0/7/8/9 |
| 7 | TR15 3, TR16 4 |
| 8 | TR15 1/2 |
| 9 | TR3 7, TR4 8, TR16 5/6 |
| 10 | TR1 1/2/3, TR3 6 |
| 11 | TR4 9, TR5 0, TR6 0 |
| 12 | TR2 4/5 |
| 13 | TR8 4/5, TR7 1/2/3, TR9 6 |
| 14 | PL25 3/4/5, PL26 6/7/8 |
| 15 | PL22 0, PL23 1, PL24 2 |
| 16 | PL30 3/4/5, PL31 1/2 |
| 17 | PL27 6/7, PL28 8, PL29 3 |
| 18 | PL13 1/2, PL14 3/4/5/6 |
| 19 | PL10 1, PL11 2/3, PL12 4/5/6 |
| 20 | PL17 7/8, PL18 9 |
| 21 | PL15 7/8/9, PL16 0 |
| 22 | PL32 9, PL33 9, PL34 0, PL35 0 |
| 23 | EX22 6/7, EX23 0/8/9 |
| 24 | PL1, PL2, PL3, PL4, PL5, PL6, PL7, PL8, PL9 |
| 25 | PL19 0/8/9, PL20 6/7 |
| 26 | EX20 3/4, EX21 5, EX38 8, EX39 5/6 |



Appendix B:
Retail, leisure and town centre trends

Retail Market Review and Town Centre Trends

1. To put our assessment into context and inform our advice on the need for additional retail floorspace in the study area, we have undertaken a review of the current retail market and social trends influencing the retail sector. Our review draws on published data sources, including research by Experian and Verdict.
2. This section also provides a brief analysis of relevant government research and town centre strategies which have come forward over the last few years, partly in response to the retail trends identified, to promote a consistent policy objective which seeks to strengthen town centres.

Economic Outlook

3. Advice published by Experian (Retail Planner 12.1, 2014) identifies that the UK economy has improved in recent times, driven by consumer spending. As inflation continues to ease steadily, and output and employment growth accelerate, household finances will gradually improve and retail spending growth will increase.
4. The consensus outlook for the medium term is for annual average GDP growth of about 2.4% over the next five years, which is slightly below the long term trend rate and less buoyant than before the recession. This is primarily due to pressure on government finances, weak bank lending and high household debt. Over the longer term the rate of economic growth is predicted to improve slightly, however due to continuing fiscal restraint this growth is likely to be constrained.

Population Change

5. The rate at which the UK population is growing is accelerating. Between 1971 and 1991 it increased by just over 0.1% pa, whereas over the subsequent 20 years it increased by almost 0.5% pa. Over the next 10 years (2013-23) it is expected to increase by just over 0.7% pa, or 7.5% in total.
6. Advances in healthcare and medicine mean that people are living much longer. It will therefore be increasingly important for Councils to ensure that older consumers are adequately catered for with the right type of facilities in the right locations. The proportion of the population aged over 65 is expected to increase from 17.5% of the

total population in 2013 to 19.5% in 10 years' time, a growth rate of 20%, which is more than double the rate of total population growth (7.5%).

Retail Expenditure and Sales Efficiency

Retail Expenditure Growth

7. Comparison goods spending is expected to grow at a much higher rate than convenience goods spending over the plan period. For comparison goods, expenditure growth per head was 0.5% in 2011, increasing to 2.6% in 2012 and 4.6% in 2013 according to Experian. Between 2015 and 2025 annual average growth is expected to be around of 3.3% pa. For convenience goods, spending declined between 2011 and 2013. However, Experian estimate a return to positive expenditure growth between 2015 and 2025 of around 0.6% pa.
8. To put these forecasts into historical context, comparison goods growth averaged 4.2% pa over the last 40 years, with stronger growth of 5.2% pa over the last 30 years and 5.6% pa over the last 20 years. Convenience goods growth has been much weaker, averaging 0.4% pa over the last 40 years and 0.3% pa over the last 20 years.

Online Spending

9. The popularity of online retailing grew rapidly between 2008 and 2012. Most retailers now have an online presence, thus it is expected that this growth will slow. It is, however, likely to continue outpacing growth in total retail sales each year from 2013 to 2018, rising from £33.7bn to £50.2bn, an overall increase of 49%¹.
10. Internet spending and other forms of sales which are not derived from physical floorspace need to be taken into account when undertaking retail studies. Special Forms of Trading (SFT) includes all types of non-store retailing (internet, markets and mail order) and in 2013 was equivalent to 12% of total retailing (15.6% for comparison goods and 8.5% for convenience goods). In 2018, Experian predict that non-store sales (SFT) will reach 17% of total retail, growing steadily until it plateaus at around 21% by 2026.
11. Not all of non-store sales reduce the need for physical floorspace (for instance click and collect and the fulfilment of many grocery internet orders through local stores). Therefore, to account for this when calculating the effect of SFT on the need for retail

¹ Verdict: Online & Remote Shopping, E Retail in the UK (August 2013)

floorspace, Experian recommend adjustments of 11.1% for comparison goods and 2.3% for convenience goods in 2013. These are forecast to rise to 15.3% and 3.8% respectively by 2019².

Sales Efficiency Growth

12. The sales efficiency growth rate represents the potential ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (e.g. rent, rates and service charges) by increasing their average sales densities. Applying a turnover 'efficiency' sales density growth rate is a standard approach used in retail planning studies and has been used in this study in accordance with good practice.
13. Following the weak or negative overall sales growth during the recession and the growth of online shopping, many retailers have struggled to increase or maintain sales density levels and, together with other financial problems, this has led some retailers into administration. As a result sales density growth is now significantly lower than the high rates seen during the boom of the latter half of the 1990s and first half of the 2000s.
14. The trend towards the demolition of inefficient stores and the provision of more modern stores with higher and more efficient sales densities is expected to result in less scope to increase comparison goods sales densities in the future. Accordingly, Experian expect an efficiency growth rate for comparison goods of c. 2.6% pa between 2017 and 2021 and 2.2% pa between 2022-2035.
15. Scope for increased sales densities is even more limited for convenience goods because the majority of foodstores already drive high sales efficiencies. An efficiency growth rate of close to zero % pa between 2014 and 2030 is recommended by Experian and these assumptions inform our approach.

Internet Growth & Multichannel Retailing

16. The online shopping population is reaching saturation, with over 40m online shoppers in the UK expected by 2017. Future growth in the market is likely to come from increased spend driven by new technology and improved delivery options. Changes in technology are driving sales with the expansion of tablet devices which provide a

² Experian: Retail Planner Briefing Note 12.1, October 2014

better browsing experience. According to Verdict, in most sectors the average spend per trip is 64.5% higher on a tablet than a laptop/PC³.

17. Click and collect is forecast to be one of the most significant drivers of growth, with a rise of 62.7% in click and collect purchases expected between 2013 and 2018³. The service provides physical retailers with an important benefit over pure internet operators and creates opportunities for making additional purchases when customers collect orders from stores.
18. The growth in online sales has implications for bricks and mortar stores as it potentially reduces the need for so many outlets. However, trends indicate that online and in-store shopping channels are becoming more blurred as shoppers increasingly research items online or in stores before making purchases. According to Verdict, in 2012 61% of shoppers researched goods online before purchasing in store, and some 38% of customers researched goods in store before buying online.
19. These trends, combined with the importance of 'click and collect' highlight that physical stores will still have a significant role in the multichannel shopping environment, although their size and format will differ from traditional stores. The advantages of physical stores, in terms of the shopping experience, service and immediacy of products in a showroom setting, will see a network of key stores remain a fundamental component of retailer's strategies to provide an integrated multichannel retail proposition.

Changing Retailer Requirements

Space Requirements

20. The retail sector has undergone significant changes over the last decade which has fundamentally altered how, where and when we shop. This has had major implications for retailers' space requirements, which combined with the recent recession, has changed the retail landscape of our towns and cities.
21. During the recession retailers' margins were squeezed, whilst other costs continued to rise and a raft of multiple and independent retailers either collapsed or have significantly shrunk their store portfolios. The decline in the amount of occupied retail space in town centre locations has not typically been offset by new retail

³ Verdict: Online & Remote Shopping, E Retail in the UK (August 2013)

developments. Many town centre schemes have been put on hold or significantly scaled down in size, and with 'fairly weak' expenditure growth forecast in the medium term, retailers are expected to remain cautious about store expansion.

22. The growth of the internet means that retailers no longer need stores in every town to achieve national coverage. Many retailers are therefore focusing their development programmes on the provision of large flagship stores in strategic locations, supported by smaller satellite stores and transactional websites. The larger flagships accommodate full product ranges whilst smaller stores offer more select ranges, supplemented by internet kiosks allowing access to the full range. This offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions.
23. This polarisation of retailing will result in larger dominant centres continuing to attract key retailers (where space is available), with medium sized centres potentially struggling to attract investment. Local, or neighbourhood, centres should be less affected by this trend and are likely to retain their attraction for top-up and day-to-day shopping. This changing retail structure needs to be considered carefully when analysing household survey results as it will have implications on how to plan for growth and change.

Out-of-Centre Retailing

24. Retailers are opting to develop stores in the most strategic and cost effective locations, with a notable resurgence of out-of-centre destinations, which offer benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills (BIS) reports that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000; whilst the number of town centre stores fell by almost 15,000 between 2000 and 2009, the majority of which are likely to have been in 'high street' locations.
25. Many traditional town centre retailers have developed out-of-town store formats, including John Lewis, who now operate a number of 'At Home' stores in out-of-centre locations, as well as other retailers such as Next, Primark and H&M.

The Role of the Town Centre

26. The town centre has been the main shopping channel for centuries. However, with weaker expenditure growth and the loss of trade to out-of-centre and online, its future role is set to change dramatically. Emerging trends suggest that many centres will be used increasingly for leisure and social activities as well as traditional retailing, with more bars, restaurants, food outlets and community spaces opening in vacant units.
27. As retailers improve their multichannel offer, the expectation is that town centre stores will be used increasingly as showrooms and to support e-retailing (with click and collect points and safe drop boxes for customers to collect online orders, and in-store kiosks for customers to make online purchases). Towns will need to capitalise on the opportunities that click and collect services offer. Where overall demand for retail floorspace stabilises or declines, it is anticipated that more secondary and tertiary space, which suffers from lower levels of footfall, will increasingly be converted into alternative town centre and residential uses.
28. Enhancing the non-retail offer so towns function as more than just retail locations will also help drive footfall and increase dwell time. Towns should promote unique attractions such as heritage assets, historic buildings and cultural features which can differentiate a centre and improve its attractiveness.
29. To ensure that town centres have a viable function moving forwards they must provide an attractive shopping and leisure experience which the internet is unable to match. Councils /town centre managers need to gain a better understanding of the catchment and what local people want from their town, to provide the right mix of outlets and services. A vital component of this will be making town centres as accessible as possible, with improved and cheaper car parking.
30. An important consideration for councils and town centre managers over the next few years will be that many retail leases are due to expire, which will enable retailers to easily exit properties in poorer performing locations. This situation needs to be monitored closely and reinforces the need to improve town centres.
31. Some of these trends have recently been identified and promoted by the Government in the Portas Review, the Government's Response to the Portas Review and a Government supported industry taskforce report.

Retail Sector Trends

Food and Grocery

32. The top four supermarkets continue to dominate the market and represent approximately 60% of the total convenience market⁴. With vast store networks and online offers, their coverage is reaching peak levels. Combined with weaker spending on convenience goods and the transfer of trade online, expansion plans are increasingly focused on redevelopment and refurbishment of existing stores rather than on new large hypermarket type stores. In some cases, for example Tesco, space within their larger format stores is being sub-let to restaurants, gyms and children's play centres.
33. The development of smaller store formats for top up food shopping has become increasingly popular in response to consumers seeking to reduce waste by moving from weekly shops to more frequent smaller shops, or to avoid the high fuel prices associated with travelling long distances. As a result, many of the main operators are expanding their smaller concept stores - Tesco Express, Sainsbury's Local, M Local, Little Waitrose, etc.
34. The value/discount retailers are continuing to expand, having gained considerable market share during the recession. Aldi and Lidl have both succeeded in attracting customers who are looking to trade down in price but not quality, and between 2009 and 2013, Aldi has doubled its market share to 3.2%, whilst Lidl's market share has risen to 2.0%.
35. Food retailers are also continuing to develop online offers to meet increasing consumer demand for convenient food shopping, much of which is still fulfilled through existing store networks. Click and collect services are expanding into the grocery sector with some retailers developing 'drive-thru' collection points for picking up online orders.

Clothing and Footwear

36. By 2017, Verdict estimates that the clothing and footwear sector will represent 15.9% of total retail spend (a marginal increase from 15.2% in 2012). The proportion of clothing sales transacted online is currently around 12.4% and is expected to rise to just over 20% by 2017 as browsing services improve.

⁴ Verdict: Food & Grocery Market Forecasts, December 2013

37. Low levels of consumer confidence in addition to high prices are expected to keep clothing and footwear sales volumes low. Premium and luxury brands will continue to maintain their consumer appeal, whilst growth from value retailers will become more subdued as they seek to ensure their profitability.

Premium and Luxury Goods

38. More affluent consumers have been able to maintain a higher level of personal and discretionary spending during the recession and therefore the premium and luxury goods sector has remained relatively strong. There is still high demand for premium brands and goods across all retail sectors, from clothing and accessories to high tech items.
39. In response to this trend, Verdict predict that the premium sector of the UK department store market (e.g. Harrods and Selfridges) will account for 43% of total department store expenditure in 2017 as midmarket department stores (e.g. John Lewis, House of Fraser and Debenhams) expand designer and luxury goods ranges.

Electricals

40. The electrical sector has suffered as a result of the recession as households cut back on 'big ticket' items combined with the shift of spending online. Since 2008 the proportion of electrical spending which takes place online has more than doubled to 43%⁵. Casualties in the sector include Comet and Jessops, along with Best Buy who exited the UK market.
41. Growth remains strong however for smaller, high tech items such as tablets and premium electrical goods, with retailers such as Apple and John Lewis continuing to do well. There is also demand for 'value' ranges of electrical goods, much of which has been captured by the supermarkets. Over the medium-term at least, sales of big-ticket items are likely to remain subdued.

Homewares

42. Growth in the more traditional part of the homewares market (such as furniture and floorcoverings) is heavily reliant on the housing market and has been weak in recent years. Growth is expected to remain subdued during 2014, but will improve as the housing market strengthens. The softer end of the homewares market (i.e. smaller

⁵ Verdict: UK Retail Review & Sector Forecasts to 2017

more decorative items), has been more resilient as consumers look at cheaper ways to refresh their homes.

Music, Video and Books

43. Technology is removing the need for physical stores as consumers can now download/stream music and films directly. As a result the music and video sector has shrunk significantly with negative growth in retail spending. Over three quarters (78%) of music and video sales are now online and Verdict predicts that by 2017 online sales will account for 90% of the market⁴.
44. The book sector has been heavily influenced by the growth of e-reader devices (e.g. Kindle), and the sector is increasingly moving from physical to digital products. By 2018 it is estimated that just fewer than three-quarters of the book market will be online, with almost half of the online market attributed to digital sales.

Relevant Government Research

The Portas Review (December 2011)

45. In May 2011, Mary Portas was appointed to lead an independent review into the future of the high street, in response to the effects of the recession on the retail industry and local high streets in particular.
46. The report suggested measures to tackle the further decline of the high street. Amongst 28 separate recommendations, there is a call to strengthen policy in favour of 'town centres first' following the publication of the (then draft) NPPF. In summary the recommendations aim to:
 - o Run town centres like businesses: by strengthening the management of high streets through 'Town Teams', developing the BID model and encouraging new markets;
 - o Get the basics right: by looking at how the business rate system could better support small businesses and independent retailers, encouraging affordable town centre car parking and looking at further opportunities to remove red tape on the high street;
 - o Level the playing field: by ensuring a strong town centre first approach in planning, introducing Secretary of State 'exceptional sign off' for out-of-centre

proposals and encouraging large retailers to show their support for high streets by mentoring local businesses;

- o Define landlords' roles/responsibilities: by looking at disincentives for landlords leaving properties vacant, empowering local authorities where landlords are negligent and making proactive use of Compulsory Purchase Order powers; and
- o Give communities greater say: by including the high street in neighbourhood planning and encouraging innovative community uses of empty high street spaces.

Government Response to Portas

47. The Government published its formal response to the Portas Review in March 2012, which accepted the majority of Portas' recommendations. It announced a number of 'Portas Pilot' towns, which were chosen to set up Town Teams to create plans for the future of their high streets. In addition, the Government announced their intention to provide investment to help Business Improvement Districts (BIDs) access loans for set-up costs and provide funding for a Future High Street X-Fund (now rebranded as the High Streets Renewal Fund) to reward towns which are delivering innovative plans to bring their town centres back to life. Other initiatives included a National Market Day in June; plans to double small business rate relief; community involvement in the redesigning the concept of their high streets to reinvigorate areas of decline, to increase footfall and encourage people to live in town centres.
48. One measure which did not receive Government support was the call to introduce Secretary of State 'exceptional sign off' for all new out-of-town developments and require all large new developments to have an 'affordable shops' quota. The Government stated that LPAs are best placed to understand local needs and 'exceptional sign off' is contrary to the Government's ethos of devolution. As such, the Government will continue to use the call-in power sparingly.
49. Arising from key recommendations in the Portas Review, the Government supported the establishment of an industry taskforce to analyse retail property issues relating to town centres. This taskforce published their report, Beyond Retail – Redefining the shape and purpose of town centres in November 2013 and their principal recommendations for achieving rejuvenated town centres fit for the future requires:
 - o Retail capacity models need to fully reflect the impact of the growth of online shopping.

- Greater engagement with the private sector to improve local authority skills and understanding of market demand and trends so that the retail core can be strengthened and re-configured, re-using obsolete areas for new uses.
- Proactive use of Compulsory Purchase Orders (CPO) to enable regeneration of town centres, alongside an urgent review of the complexity and costs associated with CPO.
- A workable, private sector led Tax Increment Finance (TIF) model in addition to traditional funding models for town centre redevelopment.
- Local authorities to take more risk in investing capital reserves now to help improve town centres, which can be repaid as the local economy recovers.
- Piloting the concept of a joint venture vehicle and associated high street property fund so that land assets can be pooled which would overcome fragmented ownership.
- The National Planning Policy Framework (NPPF) to be reinforced, further strengthening the 'town centre' first approach to planning policy.
- Town centres to develop an integrated digital strategy, incorporating mobile, social media and website, to encourage more shoppers and longer visits.
- A business rate cap until the next revaluation takes effect in 2017, using this time to undertake a full review of the business rates system as a sustainable means of raising money towards paying for local government.
- The quality, quantity and cost of town centre car parking to be reviewed in relation to free out-of-centre provision. Flexible parking policies are needed to attract town centre visitors.

Summary

- Economic growth will continue to remain muted over the plan period, with relatively weak expenditure growth in the short-medium term.
- It is evident that the traditional high street faces a number of challenges, not least from the impacts of the recession, including tightening of retail spending and changing consumer behaviour, but also from increasing competition posed by the internet, multichannel retailing and out of centre developments.
- Town centre strategies which support the continued evolution of the high street are considered ever more vital. This may involve providing a high quality shopping 'experience', maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets to increase length of stay and spend.
- It will be important for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan

period and to reaffirm their unique selling points which differentiate their retail offer from other centres.

- o The on-going pattern of polarisation suggests that larger centres are well placed to maintain and enhance their offer. However, this is dependent on continued investment to ensure the right mix of retailers and other services.

Appendix C:
Retail Capacity: Falmouth & Penryn

TABLE 9a: CONVENIENCE GOODS EXPENDITURE CAPACITY, FALMOUTH & PENRYN, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|--|---------------|---------------|--------------|--------------|
| Available Convenience Goods Expenditure (£m) | £1,856.0 | £1,971.2 | £2,097.6 | £2,257.0 |
| Turnover from Study Area (£m) | £82.9 | £92.7 | £98.8 | £106.4 |
| Market Share (%) | 4.5% | 4.7% | 4.7% | 4.7% |
| Expenditure Inflow (£m) | £10.4 | £11.1 | £11.8 | £12.7 |
| Total Turnover Potential (£m) | £93.3 | £103.8 | £110.6 | £119.1 |
| Benchmark Turnover of Existing Facilities (£m) | £94.1 | £92.2 | £92.4 | £93.5 |
| Commitments (£m) | £25.8 | £25.3 | £25.3 | £25.7 |
| Residual Expenditure (£m) | -£26.6 | -£13.7 | -£7.2 | -£0.1 |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000 | £11,762 | £11,785 | £11,927 |
| Indicative retail floorspace capacity (£m) | -2215 | -1164 | -610 | -10 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 5

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from Table 7. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative and based on a large grocery operator format.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

TABLE 10a: COMPARISON GOODS EXPENDITURE CAPACITY, FALMOUTH, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|---|---------------|---------------|---------------|-------------|
| Available Comparison Goods Expenditure (£m) | £2,925.0 | £3,566.9 | £4,310.9 | £5,424.6 |
| Turnover from Study Area (£m) | £75.1 | £113.6 | £137.6 | £173.5 |
| Market Share (%) | 2.6% | 3.2% | 3.2% | 3.2% |
| Expenditure Inflow (£m) | £9.5 | £11.5 | £13.9 | £17.5 |
| Total Turnover Potential (£m) | £84.5 | £125.2 | £151.5 | £191.0 |
| Benchmark Turnover of Existing Facilities (£m) | £91.8 | £103.4 | £114.9 | £130.9 |
| Commitments (£m) | £40.5 | £45.6 | £50.7 | £57.8 |
| Residual Expenditure (£m) | -£47.8 | -£23.9 | -£14.1 | £2.3 |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,000 | £5,634 | £6,257 | £7,130 |
| Indicative retail floorspace capacity (£m) | -9559 | -4246 | -2249 | 328 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 7

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from 2010 Retail Study. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative only.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

Appendix D:
Retail Capacity: Bodmin

TABLE 9b: CONVENIENCE GOODS EXPENDITURE CAPACITY, BODMIN, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|--|--------------|---------------|---------------|--------------|
| Available Convenience Goods Expenditure (£m) | £1,856.0 | £1,971.2 | £2,097.6 | £2,257.0 |
| Turnover from Study Area (£m) | £67.3 | £53.9 | £58.9 | £65.2 |
| Market Share (%) | 3.6% | 2.7% | 2.8% | 2.9% |
| Expenditure Inflow (£m) | £8.6 | £9.1 | £9.7 | £10.4 |
| Total Turnover Potential (£m) | £75.9 | £63.0 | £68.6 | £75.6 |
| Benchmark Turnover of Existing Facilities (£m) | £79.6 | £78.0 | £78.2 | £79.1 |
| Commitments (£m) | £3.6 | £3.5 | £3.5 | £3.6 |
| Residual Expenditure (£m) | -£7.3 | -£18.5 | -£13.1 | -£7.0 |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000 | £11,762 | £11,785 | £11,927 |
| Indicative retail floorspace capacity (£m) | -609 | -1576 | -1113 | -591 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 5

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from Table 7. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative and based on a large grocery operator format.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

TABLE 10b: COMPARISON GOODS EXPENDITURE CAPACITY, BODMIN, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|---|--------------|--------------|--------------|-------------|
| Available Comparison Goods Expenditure (£m) | £2,925.0 | £3,566.9 | £4,310.9 | £5,424.6 |
| Turnover from Study Area (£m) | £49.6 | £51.8 | £64.1 | £82.6 |
| Market Share (%) | 1.7% | 1.5% | 1.5% | 1.5% |
| Expenditure Inflow (£m) | £3.1 | £3.8 | £4.6 | £5.8 |
| Total Turnover Potential (£m) | £52.8 | £55.7 | £68.7 | £88.4 |
| Benchmark Turnover of Existing Facilities (£m) | £52.8 | £59.4 | £66.0 | £75.2 |
| Commitments (£m) | £2.4 | £2.7 | £3.0 | £3.4 |
| Residual Expenditure (£m) | -£2.4 | -£6.5 | -£0.4 | £9.7 |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,000 | £5,634 | £6,257 | £7,130 |
| Indicative retail floorspace capacity (£m) | -480 | -1154 | -58 | 1364 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 7

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover at 2014 assumed to be in equilibrium with current (2014) turnover. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative only.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

Appendix E:
Retail Capacity: Penzance & Newlyn

TABLE 9c: CONVENIENCE GOODS EXPENDITURE CAPACITY, PENZANCE & NEWLYN, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|--|--------------|--------------|-------------|-------------|
| Available Convenience Goods Expenditure (£m) | £1,856.0 | £1,971.2 | £2,097.6 | £2,257.0 |
| Turnover from Study Area (£m) | £94.4 | £92.7 | £99.4 | £107.8 |
| Market Share (%) | 5.1% | 4.7% | 4.7% | 4.8% |
| Expenditure Inflow (£m) | £11.9 | £12.6 | £13.4 | £14.5 |
| Total Turnover Potential (£m) | £106.3 | £105.3 | £112.8 | £122.3 |
| Benchmark Turnover of Existing Facilities (£m) | £110.6 | £108.4 | £108.6 | £109.9 |
| Commitments (£m) | £2.6 | £2.6 | £2.6 | £2.6 |
| Residual Expenditure (£m) | -£6.9 | -£5.6 | £1.7 | £9.8 |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000 | £11,762 | £11,785 | £11,927 |
| Indicative retail floorspace capacity (£m) | -571 | -478 | 141 | 821 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 5

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from Table 7. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative and based on a large grocery operator format.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

TABLE 10c: COMPARISON GOODS EXPENDITURE CAPACITY, PENZANCE & NEWLYN, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|---|---------------|---------------|---------------|-------------|
| Available Comparison Goods Expenditure (£m) | £2,925.0 | £3,566.9 | £4,310.9 | £5,424.6 |
| Turnover from Study Area (£m) | £90.8 | £106.5 | £129.5 | £164.2 |
| Market Share (%) | 3.1% | 3.0% | 3.0% | 3.0% |
| Expenditure Inflow (£m) | £8.2 | £10.0 | £12.0 | £15.2 |
| Total Turnover Potential (£m) | £99.0 | £116.4 | £141.6 | £179.4 |
| Benchmark Turnover of Existing Facilities (£m) | £114.1 | £128.6 | £142.8 | £162.7 |
| Commitments (£m) | £8.8 | £9.9 | £11.0 | £12.5 |
| Residual Expenditure (£m) | -£23.9 | -£22.1 | -£12.2 | £4.1 |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,000 | £5,634 | £6,257 | £7,130 |
| Indicative retail floorspace capacity (£m) | -4776 | -3914 | -1951 | 579 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 7

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from 2010 Retail Study. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative only.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

Appendix F:
Retail Capacity: Liskeard

TABLE 9d: CONVENIENCE GOODS EXPENDITURE CAPACITY, LISKEARD, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|--|--------------|--------------|--------------|--------------|
| Available Convenience Goods Expenditure (£m) | £1,856.0 | £1,971.2 | £2,097.6 | £2,257.0 |
| Turnover from Study Area (£m) | £56.0 | £52.7 | £56.2 | £60.5 |
| Market Share (%) | 3.0% | 2.7% | 2.7% | 2.7% |
| Expenditure Inflow (£m) | £3.4 | £3.6 | £3.8 | £4.1 |
| Total Turnover Potential (£m) | £59.4 | £56.3 | £60.0 | £64.6 |
| Benchmark Turnover of Existing Facilities (£m) | £38.8 | £38.0 | £38.1 | £38.5 |
| Commitments (£m) | £8.4 | £8.3 | £8.3 | £8.4 |
| Residual Expenditure (£m) | £12.2 | £10.1 | £13.6 | £17.7 |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000 | £11,762 | £11,785 | £11,927 |
| Indicative retail floorspace capacity (£m) | 1015 | 855 | 1157 | 1485 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 5

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from Table 7. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative and based on a large grocery operator format.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

TABLE 10d: COMPARISON GOODS EXPENDITURE CAPACITY, LISKEARD, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|---|--------------|--------------|-------------|--------------|
| Available Comparison Goods Expenditure (£m) | £2,925.0 | £3,566.9 | £4,310.9 | £5,424.6 |
| Turnover from Study Area (£m) | £60.6 | £70.1 | £85.1 | £107.6 |
| Market Share (%) | 2.1% | 2.0% | 2.0% | 2.0% |
| Expenditure Inflow (£m) | £5.2 | £6.3 | £7.6 | £9.6 |
| Total Turnover Potential (£m) | £65.8 | £76.4 | £92.7 | £117.2 |
| Benchmark Turnover of Existing Facilities (£m) | £65.8 | £74.1 | £82.3 | £93.8 |
| Commitments (£m) | £3.7 | £4.2 | £4.6 | £5.3 |
| Residual Expenditure (£m) | -£3.7 | -£1.9 | £5.8 | £18.1 |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,000 | £5,634 | £6,257 | £7,130 |
| Indicative retail floorspace capacity (£m) | -740 | -333 | 919 | 2536 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 7

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover at 2014 assumed to be in equilibrium with current (2014) turnover. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative only.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

Appendix G:
Retail Capacity: Wadebridge

TABLE 9e: CONVENIENCE GOODS EXPENDITURE CAPACITY, WADEBRIDGE, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|--|---------------|---------------|---------------|---------------|
| Available Convenience Goods Expenditure (£m) | £1,856.0 | £1,971.2 | £2,097.6 | £2,257.0 |
| Turnover from Study Area (£m) | £37.1 | £42.3 | £45.8 | £50.4 |
| Market Share (%) | 2.0% | 2.1% | 2.2% | 2.2% |
| Expenditure Inflow (£m) | £6.9 | £7.3 | £7.8 | £8.3 |
| Total Turnover Potential (£m) | £44.0 | £49.6 | £53.6 | £58.7 |
| Benchmark Turnover of Existing Facilities (£m) | £35.4 | £34.7 | £34.8 | £35.2 |
| Commitments (£m) | £41.4 | £40.6 | £40.6 | £41.1 |
| Residual Expenditure (£m) | -£32.9 | -£25.7 | -£21.8 | -£17.6 |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000 | £11,762 | £11,785 | £11,927 |
| Indicative retail floorspace capacity (£m) | -2738 | -2187 | -1852 | -1478 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 5

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from Table 7. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative and based on a large grocery operator format.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

TABLE 10e: COMPARISON GOODS EXPENDITURE CAPACITY, WADEBRIDGE, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|---|---------------|---------------|---------------|--------------|
| Available Comparison Goods Expenditure (£m) | £2,925.0 | £3,566.9 | £4,310.9 | £5,424.6 |
| Turnover from Study Area (£m) | £27.8 | £36.8 | £45.3 | £58.0 |
| Market Share (%) | 1.0% | 1.0% | 1.0% | 1.1% |
| Expenditure Inflow (£m) | £4.2 | £5.1 | £6.1 | £7.7 |
| Total Turnover Potential (£m) | £32.0 | £41.9 | £51.4 | £65.8 |
| Benchmark Turnover of Existing Facilities (£m) | £32.0 | £36.0 | £40.0 | £45.6 |
| Commitments (£m) | £19.1 | £21.5 | £23.9 | £27.2 |
| Residual Expenditure (£m) | -£19.1 | -£15.6 | -£12.5 | -£7.0 |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,000 | £5,634 | £6,257 | £7,130 |
| Indicative retail floorspace capacity (£m) | -3819 | -2777 | -1999 | -989 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 7

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover at 2014 assumed to be in equilibrium with current (2014) turnover. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative only.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

Appendix H:
Retail Capacity: Helston

TABLE 9f: CONVENIENCE GOODS EXPENDITURE CAPACITY, HELSTON, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|--|--------------|-------------|-------------|--------------|
| Available Convenience Goods Expenditure (£m) | £1,856.0 | £1,971.2 | £2,097.6 | £2,257.0 |
| Turnover from Study Area (£m) | £59.9 | £61.1 | £64.7 | £69.3 |
| Market Share (%) | 3.2% | 3.1% | 3.1% | 3.1% |
| Expenditure Inflow (£m) | £10.1 | £10.7 | £11.4 | £12.2 |
| Total Turnover Potential (£m) | £69.9 | £71.8 | £76.1 | £81.5 |
| Benchmark Turnover of Existing Facilities (£m) | £71.6 | £70.2 | £70.3 | £71.1 |
| Commitments (£m) | £0.0 | £0.0 | £0.0 | £0.0 |
| Residual Expenditure (£m) | -£1.6 | £1.7 | £5.8 | £10.4 |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000 | £11,762 | £11,785 | £11,927 |
| Indicative retail floorspace capacity (£m) | -136 | 141 | 493 | 869 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 5

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from Table 7. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative and based on a large grocery operator format.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

TABLE 10f: COMPARISON GOODS EXPENDITURE CAPACITY, HELSTON, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|---|-------------|--------------|-------------|-------------|
| Available Comparison Goods Expenditure (£m) | £2,925.0 | £3,566.9 | £4,310.9 | £5,424.6 |
| Turnover from Study Area (£m) | £25.9 | £27.1 | £32.6 | £40.7 |
| Market Share (%) | 0.9% | 0.8% | 0.8% | 0.8% |
| Expenditure Inflow (£m) | £3.3 | £4.0 | £4.9 | £6.2 |
| Total Turnover Potential (£m) | £29.3 | £31.1 | £37.4 | £46.9 |
| Benchmark Turnover of Existing Facilities (£m) | £29.3 | £33.0 | £36.6 | £41.7 |
| Commitments (£m) | £0.0 | £0.0 | £0.0 | £0.0 |
| Residual Expenditure (£m) | £0.0 | -£1.8 | £0.8 | £5.1 |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,000 | £5,634 | £6,257 | £7,130 |
| Indicative retail floorspace capacity (£m) | 0 | -325 | 134 | 721 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 7

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover at 2014 assumed to be in equilibrium with current (2014) turnover. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative only.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

Appendix I:
Retail Capacity: Camborne, Pool & Redruth

TABLE 9g: CONVENIENCE GOODS EXPENDITURE CAPACITY, CPR, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|--|---------------|---------------|--------------|-------------|
| Available Convenience Goods Expenditure (£m) | £1,856.0 | £1,971.2 | £2,097.6 | £2,257.0 |
| Turnover from Study Area (£m) | £134.7 | £130.8 | £139.7 | £150.9 |
| Market Share (%) | 7.3% | 6.6% | 6.7% | 6.7% |
| Expenditure Inflow (£m) | £5.4 | £5.7 | £6.1 | £6.6 |
| Total Turnover Potential (£m) | £140.1 | £136.5 | £145.8 | £157.4 |
| Benchmark Turnover of Existing Facilities (£m) | £137.3 | £134.6 | £134.8 | £136.4 |
| Commitments (£m) | £13.4 | £13.1 | £13.2 | £13.3 |
| Residual Expenditure (£m) | -£10.6 | -£11.2 | -£2.2 | £7.7 |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000 | £11,762 | £11,785 | £11,927 |
| Indicative retail floorspace capacity (£m) | -880 | -948 | -188 | 642 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 5

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from Table 7. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative and based on a large grocery operator format.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

TABLE 10g: COMPARISON GOODS EXPENDITURE CAPACITY, CPR, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|---|---------------|---------------|---------------|--------------|
| Available Comparison Goods Expenditure (£m) | £2,925.0 | £3,566.9 | £4,310.9 | £5,424.6 |
| Turnover from Study Area (£m) | £94.6 | £113.8 | £137.9 | £207.1 |
| Market Share (%) | 3.2% | 3.2% | 3.2% | 3.8% |
| Expenditure Inflow (£m) | £9.46 | £11.5 | £13.9 | £17.5 |
| Total Turnover Potential (£m) | £104.0 | £125.4 | £151.9 | £224.6 |
| Benchmark Turnover of Existing Facilities (£m) | £131.9 | £148.6 | £165.0 | £188.0 |
| Commitments (£m) | £8.9 | £10.1 | £11.2 | £12.7 |
| Residual Expenditure (£m) | -£36.8 | -£33.3 | -£24.3 | £23.9 |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,000 | £5,634 | £6,257 | £7,130 |
| Indicative retail floorspace capacity (£m) | -7352 | -5906 | -3889 | 3348 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 7

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from 2010 Retail Study. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative only.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

Appendix J:
Retail Capacity: Newquay

TABLE 9h: CONVENIENCE GOODS EXPENDITURE CAPACITY, NEWQUAY, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|--|---------------|---------------|---------------|---------------|
| Available Convenience Goods Expenditure (£m) | £1,856.0 | £1,971.2 | £2,097.6 | £2,257.0 |
| Turnover from Study Area (£m) | £60.7 | £57.5 | £62.4 | £68.8 |
| Market Share (%) | 3.3% | 2.9% | 3.0% | 3.0% |
| Expenditure Inflow (£m) | £12.8 | £13.5 | £14.4 | £15.5 |
| Total Turnover Potential (£m) | £73.5 | £71.0 | £76.9 | £84.3 |
| Benchmark Turnover of Existing Facilities (£m) | £76.0 | £74.5 | £74.7 | £75.6 |
| Commitments (£m) | £68.2 | £66.8 | £67.0 | £67.8 |
| Residual Expenditure (£m) | -£70.7 | -£70.4 | -£64.8 | -£59.1 |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000 | £11,762 | £11,785 | £11,927 |
| Indicative retail floorspace capacity (£m) | -5895 | -5983 | -5497 | -4952 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 5

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from Table 7. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative and based on a large grocery operator format.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

TABLE 10h: COMPARISON GOODS EXPENDITURE CAPACITY, NEWQUAY, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|---|----------------|---------------|---------------|---------------|
| Available Comparison Goods Expenditure (£m) | £2,925.0 | £3,566.9 | £4,310.9 | £5,424.6 |
| Turnover from Study Area (£m) | £27.4 | £83.3 | £101.4 | £128.7 |
| Market Share (%) | 0.9% | 2.3% | 2.4% | 2.4% |
| Expenditure Inflow (£m) | £4.3 | £5.2 | £6.3 | £7.9 |
| Total Turnover Potential (£m) | £31.6 | £88.5 | £107.7 | £136.7 |
| Benchmark Turnover of Existing Facilities (£m) | £46.4 | £52.2 | £58.0 | £66.1 |
| Commitments (£m) | £87.7 | £98.8 | £109.7 | £125.0 |
| Residual Expenditure (£m) | -£102.4 | -£62.5 | -£60.0 | -£54.5 |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,000 | £5,634 | £6,257 | £7,130 |
| Indicative retail floorspace capacity (£m) | -20479 | -11099 | -9587 | -7637 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 7

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from 2010 Retail Study. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative only.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

Appendix K:
Retail Capacity: Launceston

TABLE 9i: CONVENIENCE GOODS EXPENDITURE CAPACITY, LAUNCESTON, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|--|-------------|--------------|--------------|--------------|
| Available Convenience Goods Expenditure (£m) | £1,856.0 | £1,971.2 | £2,097.6 | £2,257.0 |
| Turnover from Study Area (£m) | £54.2 | £60.4 | £64.6 | £69.9 |
| Market Share (%) | 2.9% | 3.1% | 3.1% | 3.1% |
| Expenditure Inflow (£m) | £4.6 | £4.9 | £5.2 | £5.6 |
| Total Turnover Potential (£m) | £58.8 | £65.3 | £69.8 | £75.5 |
| Benchmark Turnover of Existing Facilities (£m) | £29.7 | £29.1 | £29.1 | £29.5 |
| Commitments (£m) | £22.4 | £22.0 | £22.0 | £22.3 |
| Residual Expenditure (£m) | £6.7 | £14.3 | £18.7 | £23.8 |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000 | £11,762 | £11,785 | £11,927 |
| Indicative retail floorspace capacity (£m) | 561 | 1215 | 1586 | 1993 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 5

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from Table 7. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative and based on a large grocery operator format.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

TABLE 10i: COMPARISON GOODS EXPENDITURE CAPACITY, LAUNCESTON, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|---|--------------|--------------|-------------|--------------|
| Available Comparison Goods Expenditure (£m) | £2,925.0 | £3,566.9 | £4,310.9 | £5,424.6 |
| Turnover from Study Area (£m) | £47.0 | £58.2 | £70.7 | £89.5 |
| Market Share (%) | 1.6% | 1.6% | 1.6% | 1.7% |
| Expenditure Inflow (£m) | £3.0 | £3.7 | £4.4 | £5.6 |
| Total Turnover Potential (£m) | £50.0 | £61.9 | £75.1 | £95.1 |
| Benchmark Turnover of Existing Facilities (£m) | £50.0 | £56.4 | £62.6 | £71.4 |
| Commitments (£m) | £5.4 | £6.1 | £6.8 | £7.7 |
| Residual Expenditure (£m) | -£5.4 | -£0.6 | £5.7 | £16.0 |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,000 | £5,634 | £6,257 | £7,130 |
| Indicative retail floorspace capacity (£m) | -1082 | -111 | 918 | 2248 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 7

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover at 2014 assumed to be in equilibrium with current (2014) turnover. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative only.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

Appendix L:
Retail Capacity: Bude

TABLE 9j: CONVENIENCE GOODS EXPENDITURE CAPACITY, BUDE, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|--|-------------|-------------|-------------|-------------|
| Available Convenience Goods Expenditure (£m) | £1,856.0 | £1,971.2 | £2,097.6 | £2,257.0 |
| Turnover from Study Area (£m) | £42.5 | £43.5 | £45.9 | £49.0 |
| Market Share (%) | 2.3% | 2.2% | 2.2% | 2.2% |
| Expenditure Inflow (£m) | £3.6 | £3.8 | £4.1 | £4.4 |
| Total Turnover Potential (£m) | £46.2 | £47.3 | £50.0 | £53.4 |
| Benchmark Turnover of Existing Facilities (£m) | £40.3 | £39.5 | £39.6 | £40.1 |
| Commitments (£m) | £3.8 | £3.7 | £3.7 | £3.8 |
| Residual Expenditure (£m) | £2.0 | £4.1 | £6.7 | £9.5 |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000 | £11,762 | £11,785 | £11,927 |
| Indicative retail floorspace capacity (£m) | 168 | 344 | 566 | 801 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 5

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from Table 7. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative and based on a large grocery operator format.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

TABLE 10j: COMPARISON GOODS EXPENDITURE CAPACITY, BUDE, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|---|---------------|--------------|--------------|-------------|
| Available Comparison Goods Expenditure (£m) | £2,925.0 | £3,566.9 | £4,310.9 | £5,424.6 |
| Turnover from Study Area (£m) | £26.0 | £36.0 | £43.3 | £54.2 |
| Market Share (%) | 0.9% | 1.0% | 1.0% | 1.0% |
| Expenditure Inflow (£m) | £3.2 | £3.9 | £4.8 | £6.0 |
| Total Turnover Potential (£m) | £29.2 | £39.9 | £48.0 | £60.1 |
| Benchmark Turnover of Existing Facilities (£m) | £31.5 | £35.5 | £39.4 | £44.9 |
| Commitments (£m) | £8.7 | £9.8 | £10.8 | £12.3 |
| Residual Expenditure (£m) | -£10.9 | -£5.3 | -£2.2 | £2.9 |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,000 | £5,634 | £6,257 | £7,130 |
| Indicative retail floorspace capacity (£m) | -2188 | -949 | -356 | 403 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 7

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from 2010 Retail Study. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative only.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

Appendix M:
Retail Capacity: St Austell

TABLE 9k: CONVENIENCE GOODS EXPENDITURE CAPACITY, ST AUSTELL, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|--|---------------|--------------|-------------|--------------|
| Available Convenience Goods Expenditure (£m) | £1,856.0 | £1,971.2 | £2,097.6 | £2,257.0 |
| Turnover from Study Area (£m) | £116.1 | £123.9 | £133.6 | £145.8 |
| Market Share (%) | 6.3% | 6.3% | 6.4% | 6.5% |
| Expenditure Inflow (£m) | £7.0 | £7.4 | £7.9 | £8.5 |
| Total Turnover Potential (£m) | £123.0 | £131.3 | £141.5 | £154.2 |
| Benchmark Turnover of Existing Facilities (£m) | £94.8 | £93.0 | £93.1 | £94.3 |
| Commitments (£m) | £41.3 | £40.5 | £40.6 | £41.1 |
| Residual Expenditure (£m) | -£13.2 | -£2.1 | £7.7 | £18.9 |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000 | £11,762 | £11,785 | £11,927 |
| Indicative retail floorspace capacity (£m) | -1096 | -182 | 655 | 1584 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 5

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from Table 7. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative and based on a large grocery operator format.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

TABLE 10k: COMPARISON GOODS EXPENDITURE CAPACITY, ST AUSTELL, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|---|---------------|---------------|-------------|--------------|
| Available Comparison Goods Expenditure (£m) | £2,925.0 | £3,566.9 | £4,310.9 | £5,424.6 |
| Turnover from Study Area (£m) | £110.1 | £147.3 | £180.3 | £230.1 |
| Market Share (%) | 3.8% | 4.1% | 4.2% | 4.2% |
| Expenditure Inflow (£m) | £8.8 | £10.7 | £13.0 | £16.3 |
| Total Turnover Potential (£m) | £118.9 | £158.0 | £193.3 | £246.4 |
| Benchmark Turnover of Existing Facilities (£m) | £118.9 | £133.9 | £148.8 | £169.5 |
| Commitments (£m) | £32.0 | £36.1 | £40.0 | £45.6 |
| Residual Expenditure (£m) | -£32.0 | -£12.0 | £4.5 | £31.3 |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,000 | £5,634 | £6,257 | £7,130 |
| Indicative retail floorspace capacity (£m) | -6400 | -2129 | 712 | 4388 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 7

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover at 2014 assumed to be in equilibrium with current (2014) turnover. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative only.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

Appendix N:
Retail Capacity: Saltash

TABLE 9I: CONVENIENCE GOODS EXPENDITURE CAPACITY, SALTASH, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|--|---------------|-------------|-------------|--------------|
| Available Convenience Goods Expenditure (£m) | £1,856.0 | £1,971.2 | £2,097.6 | £2,257.0 |
| Turnover from Study Area (£m) | £40.7 | £57.5 | £60.7 | £64.6 |
| Market Share (%) | 2.2% | 2.9% | 2.9% | 2.9% |
| Expenditure Inflow (£m) | £3.5 | £3.7 | £3.9 | £4.2 |
| Total Turnover Potential (£m) | £44.1 | £61.2 | £64.6 | £68.8 |
| Benchmark Turnover of Existing Facilities (£m) | £38.7 | £38.0 | £38.0 | £38.5 |
| Commitments (£m) | £18.4 | £18.0 | £18.1 | £18.3 |
| Residual Expenditure (£m) | -£13.0 | £5.2 | £8.5 | £12.1 |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000 | £11,762 | £11,785 | £11,927 |
| Indicative retail floorspace capacity (£m) | -1084 | 441 | 719 | 1012 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 5

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from Table 7. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative and based on a large grocery operator format.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

TABLE 10I: COMPARISON GOODS EXPENDITURE CAPACITY, SALTASH, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|---|---------------|--------------|-------------|-------------|
| Available Comparison Goods Expenditure (£m) | £2,925.0 | £3,566.9 | £4,310.9 | £5,424.6 |
| Turnover from Study Area (£m) | £19.2 | £32.8 | £39.3 | £48.8 |
| Market Share (%) | 0.7% | 0.9% | 0.9% | 0.9% |
| Expenditure Inflow (£m) | £0.6 | £0.7 | £0.9 | £1.1 |
| Total Turnover Potential (£m) | £19.8 | £33.5 | £40.1 | £49.9 |
| Benchmark Turnover of Existing Facilities (£m) | £19.8 | £22.3 | £24.8 | £28.3 |
| Commitments (£m) | £10.4 | £11.7 | £13.0 | £14.8 |
| Residual Expenditure (£m) | -£10.4 | -£0.6 | £2.3 | £6.8 |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,000 | £5,634 | £6,257 | £7,130 |
| Indicative retail floorspace capacity (£m) | -2081 | -99 | 365 | 954 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 7

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover at 2014 assumed to be in equilibrium with current (2014) turnover. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative only.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

Appendix O:
Retail Capacity: Hayle

TABLE 9m: CONVENIENCE GOODS EXPENDITURE CAPACITY, HAYLE, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|--|---------------|-------------|-------------|-------------|
| Available Convenience Goods Expenditure (£m) | £1,856.0 | £1,971.2 | £2,097.6 | £2,257.0 |
| Turnover from Study Area (£m) | £19.2 | £43.3 | £46.2 | £49.9 |
| Market Share (%) | 1.0% | 2.2% | 2.2% | 2.2% |
| Expenditure Inflow (£m) | £3.6 | £3.8 | £4.0 | £4.3 |
| Total Turnover Potential (£m) | £22.8 | £47.1 | £50.2 | £54.2 |
| Benchmark Turnover of Existing Facilities (£m) | £20.0 | £19.6 | £19.6 | £19.9 |
| Commitments (£m) | £26.5 | £25.9 | £26.0 | £26.3 |
| Residual Expenditure (£m) | -£23.6 | £1.6 | £4.6 | £8.1 |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000 | £11,762 | £11,785 | £11,927 |
| Indicative retail floorspace capacity (£m) | -1971 | 134 | 394 | 677 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 5

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from Table 7. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative and based on a large grocery operator format.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

TABLE 10m: COMPARISON GOODS EXPENDITURE CAPACITY, HAYLE, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|---|---------------|--------------|-------------|--------------|
| Available Comparison Goods Expenditure (£m) | £2,925.0 | £3,566.9 | £4,310.9 | £5,424.6 |
| Turnover from Study Area (£m) | £28.8 | £48.3 | £58.6 | £74.1 |
| Market Share (%) | 1.0% | 1.4% | 1.4% | 1.4% |
| Expenditure Inflow (£m) | £5.76 | £7.0 | £8.5 | £10.7 |
| Total Turnover Potential (£m) | £34.6 | £55.3 | £67.1 | £84.7 |
| Benchmark Turnover of Existing Facilities (£m) | £34.6 | £39.0 | £43.3 | £49.3 |
| Commitments (£m) | £15.9 | £17.9 | £19.8 | £22.6 |
| Residual Expenditure (£m) | -£15.9 | -£1.5 | £4.0 | £12.8 |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,000 | £5,634 | £6,257 | £7,130 |
| Indicative retail floorspace capacity (£m) | -3172 | -270 | 632 | 1797 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 7

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover at 2014 assumed to be in equilibrium with current (2014) turnover. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative only.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

Appendix P:
Retail Capacity: Truro

TABLE 9n: CONVENIENCE GOODS EXPENDITURE CAPACITY, TRURO, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|--|---------------|--------------|-------------|--------------|
| Available Convenience Goods Expenditure (£m) | £1,856.0 | £1,971.2 | £2,097.6 | £2,257.0 |
| Turnover from Study Area (£m) | £104.0 | £113.7 | £122.2 | £133.0 |
| Market Share (%) | 5.6% | 5.8% | 5.8% | 5.9% |
| Expenditure Inflow (£m) | £15.9 | £16.9 | £18.0 | £19.4 |
| Total Turnover Potential (£m) | £119.9 | £130.6 | £140.2 | £152.4 |
| Benchmark Turnover of Existing Facilities (£m) | £107.1 | £104.9 | £105.1 | £106.4 |
| Commitments (£m) | £29.2 | £28.7 | £28.7 | £29.1 |
| Residual Expenditure (£m) | -£16.4 | -£3.0 | £6.4 | £16.9 |
| Indicative sales density for new convenience goods floorspace (£/sq m) | £12,000 | £11,762 | £11,785 | £11,927 |
| Indicative retail floorspace capacity (£m) | -1363 | -252 | 540 | 1415 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 5

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from Table 7. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative and based on a large grocery operator format.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

TABLE 10n: COMPARISON GOODS EXPENDITURE CAPACITY, TRURO, 2014-2030

| | 2014 | 2019 | 2024 | 2030 |
|---|-------------|---------------|--------------|---------------|
| Available Comparison Goods Expenditure (£m) | £2,925.0 | £3,566.9 | £4,310.9 | £5,424.6 |
| Turnover from Study Area (£m) | £425.8 | £449.4 | £548.6 | £698.1 |
| Market Share (%) | 14.6% | 12.6% | 12.7% | 12.9% |
| Expenditure Inflow (£m) | £21.29 | £26.0 | £31.4 | £39.5 |
| Total Turnover Potential (£m) | £447.1 | £475.4 | £580.0 | £737.6 |
| Benchmark Turnover of Existing Facilities (£m) | £412.0 | £464.3 | £515.6 | £587.5 |
| Commitments (£m) | £34.6 | £39.0 | £43.3 | £49.4 |
| Residual Expenditure (£m) | £0.5 | -£27.9 | £21.0 | £100.7 |
| Indicative sales density for new comparison goods floorspace (£/sq m) | £5,000 | £5,634 | £6,257 | £7,130 |
| Indicative retail floorspace capacity (£m) | 95 | -4957 | 3356 | 14121 |

Notes:

Available expenditure from Table 3

Turnover from study area taken from Table 7

Market share is the turnover from study area expressed as a proportion of total available expenditure (taking into account impact of commitments).

Expenditure inflow based on assumptions within 2010 Retail Study.

Total turnover potential is the turnover from study area plus expenditure inflow

Benchmark turnover taken from 2010 Retail Study. Turnover of commitments taken from Table 8.

Residual expenditure is the total turnover potential minus benchmark turnover and turnover of commitments.

Sales density for new floorspace is indicative only.

Benchmark turnover and indicative sales density for new floorspace subject changes in floorspace efficiency between 2014-2030 (based on forecasts from Experian)

2012 PRICES

Appendix Q:
Baseline Quantitative Assessment Tables

TABLE 1: POPULATION WITHIN THE STUDY AREA, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | |
|-------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------|-------|-------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 2014 | 34498 | 11953 | 21318 | 29908 | 40950 | 25141 | 13584 | 12490 | 19720 | 29486 | 12679 | 9571 | 37675 | 54075 | 17555 | 26298 | 18276 | 33165 | 36208 | 15084 | 22480 | 9068 | 26830 | 273755 | 29214 | 24298 |
| 2019 | 35973 | 12472 | 22187 | 30743 | 42395 | 25988 | 14105 | 13550 | 19829 | 31241 | 13111 | 9747 | 39824 | 57161 | 17863 | 27972 | 19254 | 34435 | 36885 | 15503 | 23389 | 9689 | 27464 | 278588 | 30397 | 25377 |
| 2024 | 37447 | 12990 | 23056 | 31578 | 43839 | 26836 | 14626 | 14610 | 19938 | 32997 | 13544 | 9923 | 41973 | 60247 | 18172 | 29646 | 20231 | 35704 | 37563 | 15922 | 24298 | 10311 | 28098 | 283420 | 31580 | 26456 |
| 2030 | 39216 | 13612 | 24098 | 32580 | 45572 | 27853 | 15251 | 15882 | 20069 | 35103 | 14063 | 10135 | 44551 | 63950 | 18542 | 31655 | 21404 | 37227 | 38375 | 16425 | 25389 | 11057 | 28859 | 289219 | 33000 | 27751 |
| Change, 2014-2019 | 1474 | 519 | 869 | 835 | 1444 | 848 | 521 | 1060 | 109 | 1755 | 433 | 176 | 2149 | 3086 | 308 | 1674 | 977 | 1269 | 677 | 419 | 909 | 621 | 634 | 4832 | 1183 | 1079 |
| % | 4.3% | 4.3% | 4.1% | 2.8% | 3.5% | 3.4% | 3.8% | 8.5% | 0.6% | 6.0% | 3.4% | 1.8% | 5.7% | 5.7% | 1.8% | 6.4% | 5.3% | 3.8% | 1.9% | 2.8% | 4.0% | 6.9% | 2.4% | 1.8% | 4.0% | 4.4% |
| Change, 2014-2024 | 2948 | 1037 | 1738 | 1670 | 2888 | 1695 | 1042 | 2120 | 219 | 3511 | 865 | 353 | 4297 | 6171 | 617 | 3348 | 1955 | 2538 | 1354 | 838 | 1818 | 1243 | 1268 | 9665 | 2366 | 2158 |
| % | 8.5% | 8.7% | 8.2% | 5.6% | 7.1% | 6.7% | 7.7% | 17.0% | 1.1% | 11.9% | 6.8% | 3.7% | 11.4% | 11.4% | 3.5% | 12.7% | 10.7% | 7.7% | 3.7% | 5.6% | 8.1% | 13.7% | 4.7% | 3.5% | 8.1% | 8.9% |
| Change, 2014-2030 | 4717 | 1659 | 2780 | 2672 | 4621 | 2713 | 1668 | 3392 | 350 | 5617 | 1384 | 564 | 6876 | 9874 | 987 | 5357 | 3127 | 4061 | 2167 | 1342 | 2910 | 1989 | 2030 | 15464 | 3786 | 3453 |
| % | 13.7% | 13.9% | 13.0% | 8.9% | 11.3% | 10.8% | 12.3% | 27.2% | 1.8% | 19.0% | 10.9% | 5.9% | 18.3% | 18.3% | 5.6% | 20.4% | 17.1% | 12.2% | 6.0% | 8.9% | 12.9% | 21.9% | 7.6% | 5.6% | 13.0% | 14.2% |

Notes:
 Population based on 2011 Census data and projected forward using data supplied by Cornwall Council.

TABLE 2a: PER CAPITA CONVENIENCE GOODS EXPENDITURE, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | |
|------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 2014 | £2,101 | £2,181 | £2,150 | £2,218 | £2,131 | £1,991 | £2,058 | £1,898 | £2,323 | £2,144 | £2,292 | £2,299 | £2,076 | £2,028 | £2,109 | £2,137 | £2,155 | £2,173 | £2,138 | £2,316 | £2,152 | £2,083 | £2,162 | £1,986 | £2,267 | £2,309 |
| 2019 | £2,159 | £2,241 | £2,209 | £2,278 | £2,189 | £2,045 | £2,114 | £1,950 | £2,387 | £2,203 | £2,355 | £2,362 | £2,132 | £2,083 | £2,167 | £2,196 | £2,214 | £2,232 | £2,197 | £2,380 | £2,211 | £2,139 | £2,221 | £2,040 | £2,328 | £2,372 |
| 2024 | £2,224 | £2,309 | £2,276 | £2,348 | £2,256 | £2,107 | £2,178 | £2,009 | £2,459 | £2,270 | £2,427 | £2,434 | £2,197 | £2,146 | £2,233 | £2,262 | £2,281 | £2,300 | £2,263 | £2,452 | £2,278 | £2,204 | £2,289 | £2,102 | £2,399 | £2,444 |
| 2030 | £2,306 | £2,393 | £2,359 | £2,433 | £2,338 | £2,184 | £2,258 | £2,083 | £2,549 | £2,353 | £2,515 | £2,523 | £2,277 | £2,225 | £2,314 | £2,345 | £2,365 | £2,384 | £2,346 | £2,541 | £2,361 | £2,285 | £2,372 | £2,179 | £2,487 | £2,534 |

Notes:

Base 2012 per capita expenditure data obtained from Experian and then projected forwards using forecasts provided by Experian in October 2014.

TABLE 2b: PER CAPITA COMPARISON GOODS EXPENDITURE ON CLOTHES & SHOES, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | |
|------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 2014 | £829 | £825 | £871 | £965 | £883 | £807 | £826 | £766 | £1,005 | £973 | £951 | £1,020 | £842 | £827 | £850 | £911 | £893 | £897 | £910 | £1,002 | £934 | £865 | £948 | £879 | £1,033 | £1,061 |
| 2019 | £978 | £973 | £1,028 | £1,139 | £1,041 | £952 | £974 | £903 | £1,186 | £1,147 | £1,122 | £1,203 | £993 | £975 | £1,003 | £1,075 | £1,054 | £1,058 | £1,074 | £1,182 | £1,101 | £1,020 | £1,119 | £1,036 | £1,218 | £1,252 |
| 2024 | £1,146 | £1,140 | £1,204 | £1,334 | £1,220 | £1,115 | £1,141 | £1,058 | £1,389 | £1,344 | £1,315 | £1,410 | £1,163 | £1,143 | £1,175 | £1,260 | £1,235 | £1,239 | £1,258 | £1,385 | £1,290 | £1,195 | £1,311 | £1,214 | £1,427 | £1,467 |
| 2030 | £1,392 | £1,385 | £1,463 | £1,621 | £1,483 | £1,355 | £1,387 | £1,286 | £1,688 | £1,633 | £1,598 | £1,713 | £1,413 | £1,389 | £1,428 | £1,530 | £1,500 | £1,506 | £1,529 | £1,683 | £1,568 | £1,452 | £1,593 | £1,476 | £1,734 | £1,782 |

Notes:

Base 2012 per capita expenditure data obtained from Experian and then projected forwards using forecasts provided by Experian in October 2014.

TABLE 2c: PER CAPITA COMPARISON GOODS EXPENDITURE ON FURNITURE, FLOORCOVERINGS AND TEXTILES, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | |
|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 2014 | £325 | £344 | £349 | £376 | £363 | £326 | £333 | £306 | £417 | £375 | £405 | £395 | £337 | £340 | £337 | £354 | £337 | £350 | £372 | £423 | £358 | £309 | £311 | £337 | £426 | £368 |
| 2019 | £384 | £406 | £411 | £444 | £429 | £385 | £393 | £361 | £492 | £443 | £478 | £465 | £397 | £401 | £398 | £418 | £397 | £413 | £439 | £499 | £423 | £365 | £367 | £398 | £502 | £435 |
| 2024 | £450 | £476 | £482 | £520 | £502 | £451 | £461 | £423 | £576 | £519 | £560 | £545 | £465 | £470 | £466 | £490 | £466 | £484 | £515 | £584 | £495 | £428 | £430 | £466 | £588 | £509 |
| 2030 | £546 | £578 | £586 | £632 | £610 | £548 | £560 | £514 | £700 | £630 | £680 | £663 | £565 | £572 | £567 | £595 | £566 | £588 | £625 | £710 | £602 | £519 | £523 | £567 | £715 | £619 |

Notes:

Base 2012 per capita expenditure data obtained from Experian and then projected forwards using forecasts provided by Experian in October 2014.

TABLE 2d: PER CAPITA COMPARISON GOODS EXPENDITURE ON DIY GOODS, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | |
|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 2014 | £185 | £210 | £207 | £218 | £191 | £164 | £179 | £149 | £247 | £195 | £247 | £222 | £191 | £180 | £193 | £193 | £204 | £205 | £199 | £246 | £199 | £188 | £193 | £150 | £227 | £218 |
| 2019 | £218 | £248 | £244 | £257 | £225 | £193 | £211 | £176 | £292 | £230 | £291 | £262 | £226 | £213 | £227 | £227 | £240 | £242 | £235 | £290 | £235 | £222 | £227 | £177 | £268 | £257 |
| 2024 | £255 | £291 | £286 | £301 | £264 | £226 | £247 | £206 | £342 | £269 | £341 | £307 | £265 | £249 | £266 | £266 | £282 | £284 | £275 | £340 | £276 | £260 | £266 | £208 | £314 | £301 |
| 2030 | £310 | £353 | £347 | £366 | £321 | £275 | £300 | £250 | £415 | £327 | £414 | £373 | £322 | £303 | £324 | £323 | £342 | £345 | £334 | £413 | £335 | £316 | £323 | £253 | £381 | £366 |

Notes:
 Base 2012 per capita expenditure data obtained from Experian and then projected forwards using forecasts provided by Experian in October 2014.

TABLE 2e: PER CAPITA COMPARISON GOODS EXPENDITURE ON DOMESTIC APPLIANCES, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | |
|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 2014 | £149 | £147 | £153 | £170 | £150 | £146 | £139 | £138 | £167 | £159 | £164 | £180 | £143 | £143 | £156 | £158 | £162 | £159 | £157 | £166 | £171 | £165 | £184 | £149 | £174 | £205 |
| 2019 | £176 | £174 | £180 | £201 | £177 | £172 | £165 | £162 | £197 | £188 | £194 | £212 | £169 | £168 | £183 | £186 | £191 | £187 | £186 | £196 | £202 | £195 | £217 | £176 | £205 | £242 |
| 2024 | £206 | £204 | £211 | £235 | £207 | £202 | £193 | £190 | £231 | £220 | £227 | £249 | £197 | £197 | £215 | £218 | £224 | £219 | £218 | £230 | £237 | £229 | £255 | £206 | £240 | £284 |
| 2030 | £251 | £247 | £256 | £286 | £252 | £245 | £234 | £231 | £281 | £268 | £276 | £302 | £240 | £240 | £261 | £265 | £272 | £266 | £264 | £279 | £287 | £278 | £309 | £250 | £292 | £345 |

Notes:

Base 2012 per capita expenditure data obtained from Experian and then projected forwards using forecasts provided by Experian in October 2014.

TABLE 2f: PER CAPITA COMPARISON GOODS EXPENDITURE ON TV, HI-FI, RADIO, PHOTOGRAPHIC AND COMPUTER GOODS, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | |
|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 19 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 2014 | £267 | £321 | £316 | £321 | £286 | £269 | £281 | £250 | £336 | £299 | £321 | £304 | £265 | £282 | £307 | £293 | £314 | £294 | £310 | £324 | £268 | £286 | £285 | £276 | £329 | £300 |
| 2019 | £315 | £379 | £372 | £379 | £338 | £318 | £331 | £295 | £396 | £353 | £379 | £359 | £313 | £333 | £362 | £345 | £370 | £346 | £366 | £382 | £316 | £338 | £336 | £325 | £389 | £354 |
| 2024 | £369 | £444 | £436 | £444 | £396 | £372 | £388 | £346 | £464 | £413 | £444 | £420 | £366 | £390 | £425 | £404 | £433 | £406 | £429 | £448 | £371 | £396 | £394 | £381 | £455 | £415 |
| 2030 | £449 | £539 | £530 | £539 | £481 | £452 | £472 | £420 | £564 | £502 | £539 | £511 | £445 | £474 | £516 | £491 | £527 | £493 | £521 | £544 | £450 | £481 | £479 | £463 | £553 | £504 |

Notes:
 Base 2012 per capita expenditure data obtained from Experian and then projected forwards using forecasts provided by Experian in October 2014.

TABLE 2g: PER CAPITA COMPARISON GOODS EXPENDITURE ON PERSONAL AND LUXURY GOODS, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | |
|------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 2014 | £741 | £789 | £801 | £866 | £789 | £704 | £763 | £683 | £924 | £833 | £884 | £905 | £791 | £762 | £790 | £783 | £803 | £816 | £831 | £925 | £824 | £773 | £805 | £710 | £924 | £879 |
| 2019 | £874 | £931 | £945 | £1,021 | £931 | £831 | £900 | £805 | £1,089 | £983 | £1,043 | £1,067 | £933 | £899 | £931 | £924 | £947 | £963 | £980 | £1,091 | £971 | £912 | £950 | £837 | £1,089 | £1,037 |
| 2024 | £1,024 | £1,091 | £1,107 | £1,196 | £1,090 | £973 | £1,055 | £944 | £1,277 | £1,152 | £1,222 | £1,250 | £1,093 | £1,053 | £1,091 | £1,082 | £1,110 | £1,128 | £1,149 | £1,278 | £1,138 | £1,069 | £1,113 | £981 | £1,277 | £1,215 |
| 2030 | £1,244 | £1,326 | £1,345 | £1,454 | £1,325 | £1,183 | £1,282 | £1,147 | £1,551 | £1,399 | £1,485 | £1,519 | £1,328 | £1,280 | £1,326 | £1,315 | £1,349 | £1,371 | £1,396 | £1,553 | £1,383 | £1,299 | £1,352 | £1,192 | £1,551 | £1,477 |

Notes:

Base 2012 per capita expenditure data obtained from Experian and then projected forwards using forecasts provided by Experian in October 2014.

TABLE 2h: PER CAPITA COMPARISON GOODS EXPENDITURE ON RECREATION GOODS, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | |
|------|--------|--------|--------|--------|--------|--------|------|------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 2014 | £623 | £653 | £657 | £700 | £655 | £609 | £602 | £569 | £731 | £679 | £736 | £734 | £617 | £614 | £639 | £661 | £659 | £670 | £675 | £734 | £681 | £623 | £667 | £612 | £733 | £747 |
| 2019 | £735 | £770 | £775 | £826 | £772 | £719 | £710 | £671 | £862 | £801 | £868 | £866 | £727 | £724 | £754 | £780 | £777 | £790 | £796 | £866 | £803 | £735 | £787 | £722 | £864 | £881 |
| 2024 | £856 | £897 | £903 | £962 | £900 | £837 | £827 | £782 | £1,004 | £933 | £1,011 | £1,009 | £847 | £843 | £878 | £908 | £905 | £920 | £927 | £1,009 | £936 | £856 | £917 | £842 | £1,007 | £1,026 |
| 2030 | £1,028 | £1,077 | £1,084 | £1,155 | £1,081 | £1,006 | £993 | £939 | £1,206 | £1,121 | £1,215 | £1,211 | £1,018 | £1,013 | £1,054 | £1,091 | £1,087 | £1,105 | £1,114 | £1,211 | £1,124 | £1,028 | £1,101 | £1,011 | £1,209 | £1,232 |

Notes:
 Base 2012 per capita expenditure data obtained from Experian and then projected forwards using forecasts provided by Experian in October 2014.

TABLE 3a: TOTAL CONVENIENCE GOODS EXPENDITURE, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | |
|------|-------|-------|-------|-------|--------|-------|-------|-------|-------|-------|-------|-------|--------|--------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------|-------|-------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 2014 | £72.5 | £26.1 | £45.8 | £66.3 | £87.3 | £50.1 | £28.0 | £23.7 | £45.8 | £63.2 | £29.1 | £22.0 | £78.2 | £109.7 | £37.0 | £56.2 | £39.4 | £72.1 | £77.4 | £34.9 | £48.4 | £18.9 | £58.0 | £543.7 | £66.2 | £56.1 |
| 2019 | £77.7 | £27.9 | £49.0 | £70.0 | £92.8 | £53.2 | £29.8 | £26.4 | £47.3 | £68.8 | £30.9 | £23.0 | £84.9 | £119.1 | £38.7 | £61.4 | £42.6 | £76.9 | £81.0 | £36.9 | £51.7 | £20.7 | £61.0 | £568.4 | £70.8 | £60.2 |
| 2024 | £83.3 | £30.0 | £52.5 | £74.1 | £98.9 | £56.6 | £31.9 | £29.4 | £49.0 | £74.9 | £32.9 | £24.2 | £92.2 | £129.3 | £40.6 | £67.1 | £46.2 | £82.1 | £85.0 | £39.0 | £55.4 | £22.7 | £64.3 | £595.8 | £75.8 | £64.7 |
| 2030 | £90.4 | £32.6 | £56.9 | £79.3 | £106.6 | £60.8 | £34.4 | £33.1 | £51.2 | £82.6 | £35.4 | £25.6 | £101.5 | £142.3 | £42.9 | £74.2 | £50.6 | £88.8 | £90.0 | £41.7 | £60.0 | £25.3 | £68.5 | £630.2 | £82.1 | £70.3 |

Notes:
 Total expenditure calculated by multiplying population data by zone (Table 1) with per capita retail expenditure by zone (Table 2)

TABLE 3b: TOTAL COMPARISON GOODS EXPENDITURE ON CLOTHES AND SHOES, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | |
|------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------|-------|-------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 2014 | £28.6 | £9.9 | £18.6 | £28.9 | £36.2 | £20.3 | £11.2 | £9.6 | £19.8 | £28.7 | £12.1 | £9.8 | £31.7 | £44.7 | £14.9 | £24.0 | £16.3 | £29.7 | £33.0 | £15.1 | £21.0 | £7.8 | £25.4 | £240.5 | £30.2 | £25.8 |
| 2019 | £35.2 | £12.1 | £22.8 | £35.0 | £44.1 | £24.7 | £13.7 | £12.2 | £23.5 | £35.8 | £14.7 | £11.7 | £39.5 | £55.8 | £17.9 | £30.1 | £20.3 | £36.4 | £39.6 | £18.3 | £25.8 | £9.9 | £30.7 | £288.7 | £37.0 | £31.8 |
| 2024 | £42.9 | £14.8 | £27.8 | £42.1 | £53.5 | £29.9 | £16.7 | £15.5 | £27.7 | £44.4 | £17.8 | £14.0 | £48.8 | £68.9 | £21.4 | £37.3 | £25.0 | £44.2 | £47.3 | £22.1 | £31.4 | £12.3 | £36.8 | £344.2 | £45.1 | £38.8 |
| 2030 | £54.6 | £18.9 | £35.3 | £52.8 | £67.6 | £37.7 | £21.2 | £20.4 | £33.9 | £57.3 | £22.5 | £17.4 | £63.0 | £88.8 | £26.5 | £48.4 | £32.1 | £56.1 | £58.7 | £27.6 | £39.8 | £16.1 | £46.0 | £426.7 | £57.2 | £49.5 |

Notes:

Total expenditure calculated by multiplying population data by zone (Table 1) with per capita retail expenditure by zone (Table 2)

TABLE 3c: TOTAL COMPARISON GOODS EXPENDITURE ON FURNITURE, FLOORCOVERINGS AND TEXTILES, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | |
|------|-------|------|-------|-------|-------|-------|------|------|-------|-------|------|------|-------|-------|-------|-------|-------|-------|-------|-------|-------|------|-------|--------|-------|-------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 2014 | £11.2 | £4.1 | £7.4 | £11.3 | £14.9 | £8.2 | £4.5 | £3.8 | £8.2 | £11.1 | £5.1 | £3.8 | £12.7 | £18.4 | £5.9 | £9.3 | £6.2 | £11.6 | £13.5 | £6.4 | £8.1 | £2.8 | £8.3 | £92.4 | £12.4 | £9.0 |
| 2019 | £13.8 | £5.1 | £9.1 | £13.7 | £18.2 | £10.0 | £5.5 | £4.9 | £9.8 | £13.8 | £6.3 | £4.5 | £15.8 | £22.9 | £7.1 | £11.7 | £7.7 | £14.2 | £16.2 | £7.7 | £9.9 | £3.5 | £10.1 | £110.9 | £15.3 | £11.0 |
| 2024 | £16.8 | £6.2 | £11.1 | £16.4 | £22.0 | £12.1 | £6.7 | £6.2 | £11.5 | £17.1 | £7.6 | £5.4 | £19.5 | £28.3 | £8.5 | £14.5 | £9.4 | £17.3 | £19.3 | £9.3 | £12.0 | £4.4 | £12.1 | £132.2 | £18.6 | £13.5 |
| 2030 | £21.4 | £7.9 | £14.1 | £20.6 | £27.8 | £15.3 | £8.5 | £8.2 | £14.1 | £22.1 | £9.6 | £6.7 | £25.2 | £36.6 | £10.5 | £18.8 | £12.1 | £21.9 | £24.0 | £11.7 | £15.3 | £5.7 | £15.1 | £163.9 | £23.6 | £17.2 |

Notes:
 Total expenditure calculated by multiplying population data by zone (Table 1) with per capita retail expenditure by zone (Table 2)

TABLE 3d: TOTAL COMPARISON GOODS EXPENDITURE ON DIY GOODS, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | |
|------|-------|------|------|-------|-------|------|------|------|------|-------|------|------|-------|-------|------|-------|------|-------|-------|------|------|------|------|-------|-------|-------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 2014 | £6.4 | £2.5 | £4.4 | £6.5 | £7.8 | £4.1 | £2.4 | £1.9 | £4.9 | £5.7 | £3.1 | £2.1 | £7.2 | £9.7 | £3.4 | £5.1 | £3.7 | £6.8 | £7.2 | £3.7 | £4.5 | £1.7 | £5.2 | £41.2 | £6.6 | £5.3 |
| 2019 | £7.8 | £3.1 | £5.4 | £7.9 | £9.6 | £5.0 | £3.0 | £2.4 | £5.8 | £7.2 | £3.8 | £2.6 | £9.0 | £12.2 | £4.1 | £6.4 | £4.6 | £8.3 | £8.7 | £4.5 | £5.5 | £2.1 | £6.2 | £49.4 | £8.1 | £6.5 |
| 2024 | £9.6 | £3.8 | £6.6 | £9.5 | £11.6 | £6.1 | £3.6 | £3.0 | £6.8 | £8.9 | £4.6 | £3.0 | £11.1 | £15.0 | £4.8 | £7.9 | £5.7 | £10.1 | £10.3 | £5.4 | £6.7 | £2.7 | £7.5 | £58.9 | £9.9 | £8.0 |
| 2030 | £12.2 | £4.8 | £8.4 | £11.9 | £14.6 | £7.7 | £4.6 | £4.0 | £8.3 | £11.5 | £5.8 | £3.8 | £14.3 | £19.4 | £6.0 | £10.2 | £7.3 | £12.8 | £12.8 | £6.8 | £8.5 | £3.5 | £9.3 | £73.0 | £12.6 | £10.1 |

Notes:
 Total expenditure calculated by multiplying population data by zone (Table 1) with per capita retail expenditure by zone (Table 2)

TABLE 3e: TOTAL COMPARISON GOODS EXPENDITURE ON DOMESTIC APPLIANCES, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | |
|------|------|------|------|------|-------|------|------|------|------|------|------|------|-------|-------|------|------|------|------|-------|------|------|------|------|-------|------|------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 2014 | £5.1 | £1.8 | £3.3 | £5.1 | £6.1 | £3.7 | £1.9 | £1.7 | £3.3 | £4.7 | £2.1 | £1.7 | £5.4 | £7.7 | £2.7 | £4.2 | £3.0 | £5.3 | £5.7 | £2.5 | £3.8 | £1.5 | £4.9 | £40.8 | £5.1 | £5.0 |
| 2019 | £6.3 | £2.2 | £4.0 | £6.2 | £7.5 | £4.5 | £2.3 | £2.2 | £3.9 | £5.9 | £2.5 | £2.1 | £6.7 | £9.6 | £3.3 | £5.2 | £3.7 | £6.4 | £6.9 | £3.0 | £4.7 | £1.9 | £6.0 | £49.0 | £6.2 | £6.1 |
| 2024 | £7.7 | £2.6 | £4.9 | £7.4 | £9.1 | £5.4 | £2.8 | £2.8 | £4.6 | £7.3 | £3.1 | £2.5 | £8.3 | £11.9 | £3.9 | £6.5 | £4.5 | £7.8 | £8.2 | £3.7 | £5.7 | £2.4 | £7.2 | £58.4 | £7.6 | £7.5 |
| 2030 | £9.8 | £3.4 | £6.2 | £9.3 | £11.5 | £6.8 | £3.6 | £3.7 | £5.6 | £9.4 | £3.9 | £3.1 | £10.7 | £15.3 | £4.8 | £8.4 | £5.8 | £9.9 | £10.1 | £4.6 | £7.3 | £3.1 | £8.9 | £72.4 | £9.6 | £9.6 |

Notes:
 Total expenditure calculated by multiplying population data by zone (Table 1) with per capita retail expenditure by zone (Table 2)

TABLE 3f: TOTAL COMPARISON GOODS EXPENDITURE ON TV, HI-FI, RADIO, PHOTOGRAPHIC AND COMPUTER GOODS, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | |
|------|-------|------|-------|-------|-------|-------|------|------|-------|-------|------|------|-------|-------|------|-------|-------|-------|-------|------|-------|------|-------|--------|-------|-------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 19 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 2014 | £9.2 | £3.8 | £6.7 | £9.6 | £11.7 | £6.8 | £3.8 | £3.1 | £6.6 | £8.8 | £4.1 | £2.9 | £10.0 | £15.2 | £5.4 | £7.7 | £5.7 | £9.7 | £11.2 | £4.9 | £6.0 | £2.6 | £7.6 | £75.5 | £9.6 | £7.3 |
| 2019 | £11.3 | £4.7 | £8.3 | £11.6 | £14.3 | £8.3 | £4.7 | £4.0 | £7.9 | £11.0 | £5.0 | £3.5 | £12.5 | £19.0 | £6.5 | £9.7 | £7.1 | £11.9 | £13.5 | £5.9 | £7.4 | £3.3 | £9.2 | £90.6 | £11.8 | £9.0 |
| 2024 | £13.8 | £5.8 | £10.1 | £14.0 | £17.3 | £10.0 | £5.7 | £5.1 | £9.3 | £13.6 | £6.0 | £4.2 | £15.4 | £23.5 | £7.7 | £12.0 | £8.8 | £14.5 | £16.1 | £7.1 | £9.0 | £4.1 | £11.1 | £108.0 | £14.4 | £11.0 |
| 2030 | £17.6 | £7.3 | £12.8 | £17.6 | £21.9 | £12.6 | £7.2 | £6.7 | £11.3 | £17.6 | £7.6 | £5.2 | £19.8 | £30.3 | £9.6 | £15.6 | £11.3 | £18.4 | £20.0 | £8.9 | £11.4 | £5.3 | £13.8 | £133.9 | £18.3 | £14.0 |

Notes:
 Total expenditure calculated by multiplying population data by zone (Table 1) with per capita retail expenditure by zone (Table 2)

TABLE 3g: TOTAL COMPARISON GOODS EXPENDITURE ON PERSONAL AND LUXURY GOODS, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | |
|------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------|-------|-------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 2014 | £25.6 | £9.4 | £17.1 | £25.9 | £32.3 | £17.7 | £10.4 | £8.5 | £18.2 | £24.6 | £11.2 | £8.7 | £29.8 | £41.2 | £13.9 | £20.6 | £14.7 | £27.1 | £30.1 | £13.9 | £18.5 | £7.0 | £21.6 | £194.2 | £27.0 | £21.4 |
| 2019 | £31.4 | £11.6 | £21.0 | £31.4 | £39.5 | £21.6 | £12.7 | £10.9 | £21.6 | £30.7 | £13.7 | £10.4 | £37.1 | £51.4 | £16.6 | £25.8 | £18.2 | £33.1 | £36.2 | £16.9 | £22.7 | £8.8 | £26.1 | £233.2 | £33.1 | £26.3 |
| 2024 | £38.4 | £14.2 | £25.5 | £37.8 | £47.8 | £26.1 | £15.4 | £13.8 | £25.5 | £38.0 | £16.6 | £12.4 | £45.9 | £63.5 | £19.8 | £32.1 | £22.5 | £40.3 | £43.1 | £20.3 | £27.7 | £11.0 | £31.3 | £277.9 | £40.3 | £32.2 |
| 2030 | £48.8 | £18.0 | £32.4 | £47.4 | £60.4 | £32.9 | £19.6 | £18.2 | £31.1 | £49.1 | £20.9 | £15.4 | £59.2 | £81.9 | £24.6 | £41.6 | £28.9 | £51.0 | £53.6 | £25.5 | £35.1 | £14.4 | £39.0 | £344.6 | £51.2 | £41.0 |

Notes:

Total expenditure calculated by multiplying population data by zone (Table 1) with per capita retail expenditure by zone (Table 2)

TABLE 3h: TOTAL COMPARISON GOODS EXPENDITURE ON RECREATION GOODS, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | |
|------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------|-------|-------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 2014 | £21.5 | £7.8 | £14.0 | £20.9 | £26.8 | £15.3 | £8.2 | £7.1 | £14.4 | £20.0 | £9.3 | £7.0 | £23.2 | £33.2 | £11.2 | £17.4 | £12.0 | £22.2 | £24.4 | £11.1 | £15.3 | £5.6 | £17.9 | £167.7 | £21.4 | £18.1 |
| 2019 | £26.4 | £9.6 | £17.2 | £25.4 | £32.7 | £18.7 | £10.0 | £9.1 | £17.1 | £25.0 | £11.4 | £8.4 | £29.0 | £41.4 | £13.5 | £21.8 | £15.0 | £27.2 | £29.4 | £13.4 | £18.8 | £7.1 | £21.6 | £201.3 | £26.3 | £22.3 |
| 2024 | £32.1 | £11.6 | £20.8 | £30.4 | £39.4 | £22.5 | £12.1 | £11.4 | £20.0 | £30.8 | £13.7 | £10.0 | £35.6 | £50.8 | £16.0 | £26.9 | £18.3 | £32.8 | £34.8 | £16.1 | £22.7 | £8.8 | £25.8 | £238.5 | £31.8 | £27.1 |
| 2030 | £40.3 | £14.7 | £26.1 | £37.6 | £49.2 | £28.0 | £15.2 | £14.9 | £24.2 | £39.3 | £17.1 | £12.3 | £45.3 | £64.8 | £19.6 | £34.5 | £23.3 | £41.1 | £42.7 | £19.9 | £28.5 | £11.4 | £31.8 | £292.3 | £39.9 | £34.2 |

Notes:
 Total expenditure calculated by multiplying population data by zone (Table 1) with per capita retail expenditure by zone (Table 2)

TABLE 3i: TOTAL COMPARISON GOODS EXPENDITURE, BY ZONE

| YEAR | ZONE | | | | | | | | | | | | | | | | | | | | | | | | | | TOTAL |
|------|--------|-------|--------|--------|--------|--------|-------|-------|--------|--------|-------|-------|--------|--------|--------|--------|--------|--------|--------|--------|--------|-------|--------|----------|--------|--------|----------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | |
| 2014 | £107.6 | £39.3 | £71.5 | £108.2 | £135.8 | £76.1 | £42.4 | £35.7 | £75.5 | £103.6 | £47.0 | £36.0 | £120.0 | £170.2 | £57.4 | £88.2 | £61.6 | £112.4 | £125.1 | £57.6 | £77.2 | £29.1 | £91.1 | £852.2 | £112.3 | £91.8 | £2,925.0 |
| 2019 | £132.4 | £48.4 | £87.7 | £131.2 | £165.9 | £92.7 | £52.0 | £45.7 | £89.5 | £129.5 | £57.4 | £43.2 | £149.6 | £212.3 | £68.9 | £110.6 | £76.6 | £137.7 | £150.3 | £69.8 | £94.8 | £36.7 | £110.0 | £1,023.0 | £137.9 | £113.1 | £3,566.9 |
| 2024 | £161.3 | £59.0 | £106.7 | £157.7 | £200.7 | £112.1 | £63.1 | £57.7 | £105.3 | £160.0 | £69.3 | £51.5 | £184.6 | £261.8 | £82.1 | £137.2 | £94.2 | £167.1 | £179.2 | £84.0 | £115.2 | £45.7 | £131.7 | £1,218.1 | £167.6 | £138.0 | £4,310.9 |
| 2030 | £204.7 | £74.9 | £135.2 | £197.2 | £253.0 | £141.0 | £79.7 | £76.0 | £128.6 | £206.4 | £87.3 | £63.8 | £237.5 | £336.9 | £101.5 | £177.6 | £120.8 | £211.2 | £221.9 | £105.0 | £146.0 | £59.4 | £163.9 | £1,506.9 | £212.4 | £175.5 | £5,424.6 |

Notes:

Total expenditure calculated by multiplying population data by zone (Table 1) with per capita retail expenditure by zone (Table 2)

TABLE 6: COMPARISON GOODS MARKET SHARE, BY ZONE

| | DIY/Decorating - 1st choice | | | | | | | | | | | | | | | | | | | | | | | | | | DIY/Decorating - 2nd choice | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|-----------------------|-----------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-----------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|------|------|------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 19 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 19 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | | | |
| Falmouth & Penryn | 0.6% | 0.0% | 3.3% | 33.2% | 92.0% | 1.3% | 0.0% | 0.0% | 13.0% | 11.1% | 1.3% | 2.1% | 0.4% | 0.0% | 3.2% | 0.0% | 1.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 4.2% | 0.0% | 9.2% | 26.9% | 57.6% | 0.0% | 5.3% | 4.0% | 21.5% | 35.5% | 13.6% | 2.3% | 2.9% | 2.5% | 3.0% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | 1.3% | 0.0% | 6.5% | 0.0% | 0.0% | 0.0% | | | |
| St Austell | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 0.0% | 49.2% | 19.6% | 88.6% | 67.1% | 6.0% | 7.9% | 0.8% | 0.0% | 0.0% | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.7% | 0.0% | 36.4% | 22.2% | 69.3% | 48.2% | 8.7% | 10.1% | 5.7% | 0.0% | 0.0% | 0.0% | 2.8% | 0.0% | 0.0% | 0.0% | | | | | |
| Truro | 1.8% | 1.3% | 6.8% | 3.2% | 5.2% | 0.8% | 7.5% | 3.2% | 34.3% | 77.7% | 84.8% | 46.1% | 42.3% | 4.3% | 0.0% | 0.9% | 4.5% | 1.3% | 0.6% | 0.0% | 0.0% | 0.9% | 2.7% | 0.0% | 0.0% | 0.8% | 19.2% | 12.0% | 6.6% | 11.4% | 29.9% | 13.4% | 16.3% | 30.0% | 22.7% | 39.8% | 52.3% | 40.6% | 35.1% | 5.5% | 3.0% | 8.9% | 14.9% | 0.0% | 0.0% | 0.0% | 1.3% | 15.5% | 0.0% | 0.0% | 0.0% | | | | |
| Penzance | 72.1% | 46.3% | 40.0% | 15.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 38.2% | 23.9% | 32.0% | 9.6% | 0.0% | 0.0% | 2.6% | 0.0% | 0.0% | 1.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | |
| Bodmin | 0.0% | 0.0% | 0.0% | 0.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% | 0.0% | 8.4% | 64.3% | 41.3% | 4.6% | 2.2% | 1.9% | 2.9% | 32.1% | 0.6% | 0.0% | 0.0% | 0.8% | 0.0% | 2.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.5% | 2.3% | 8.5% | 26.2% | 17.5% | 11.6% | 0.0% | 0.0% | 3.3% | 42.8% | 1.4% | 0.0% | 0.0% | 0.0% | | | | | |
| Camborne | 0.0% | 3.2% | 12.1% | 7.9% | 0.0% | 26.7% | 3.8% | 4.3% | 2.5% | 0.4% | 5.2% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 7.1% | 0.0% | 0.0% | 2.0% | 0.0% | 24.4% | 7.2% | 3.1% | 31.5% | 2.3% | 3.7% | 1.8% | 0.0% | 5.5% | 0.0% | 1.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | |
| Hayle | 0.0% | 2.4% | 2.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.2% | 13.0% | 3.2% | 0.7% | 0.0% | 3.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | |
| Wadebridge | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | 0.0% | 1.3% | 0.0% | 0.0% | 2.8% | 26.9% | 0.0% | 0.0% | 0.0% | 0.0% | 4.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.8% | 0.0% | 6.2% | 18.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | |
| Launceston | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.5% | 0.0% | 30.4% | 85.7% | 15.7% | 38.3% | 0.0% | 10.4% | 18.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 1.8% | 3.6% | 21.6% | 45.0% | 10.1% | 29.1% | 0.0% | 19.7% | 9.4% | 0.0% | 0.0% | 0.0% | | | |
| Redruth | 0.6% | 0.0% | 0.0% | 1.8% | 0.9% | 3.0% | 13.9% | 13.3% | 2.0% | 0.0% | 3.8% | 0.0% | 0.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 7.9% | 4.2% | 0.0% | 2.3% | 16.7% | 19.2% | 8.1% | 0.0% | 6.7% | 0.0% | 1.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | |
| Liskeard | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.5% | 1.5% | 0.9% | 0.0% | 0.0% | 1.3% | 3.3% | 4.4% | 12.3% | 21.5% | 10.7% | 72.7% | 16.4% | 11.8% | 2.8% | 17.3% | 3.3% | 0.3% | 3.6% | 0.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.8% | 0.0% | 3.0% | 5.9% | 1.4% | 9.0% | 7.7% | 32.2% | 16.5% | 47.0% | 21.1% | 4.3% | 17.9% | 4.5% | 5.2% | 0.0% | 3.7% | 0.0% | 0.0% | | | |
| Newquay | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 21.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.4% | 6.7% | 0.0% | 11.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | |
| Looe | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 3.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | |
| Saltash | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 14.7% | 0.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.9% | 29.4% | 3.8% | 0.0% | 0.0% | 0.0% | 4.3% | 1.9% | 0.0% | 0.0% | 0.0% | | | |
| Camelford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 3.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | |
| Padstow | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | |
| Callington | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.9% | 5.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | 2.0% | 3.3% | 40.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | |
| St Ives | 0.0% | 12.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.0% | 15.0% | 0.0% | 0.0% | 0.0% | 3.7% | 0.0% | 0.0% | 1.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| Torpoint | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| Pool | 1.1% | 8.1% | 20.3% | 13.8% | 0.6% | 67.3% | 74.2% | 73.5% | 45.0% | 5.8% | 3.6% | 0.0% | 3.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 20.4% | 13.7% | 7.8% | 2.7% | 29.2% | 43.4% | 37.2% | 31.1% | 5.1% | 5.5% | 0.0% | 1.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| Bude | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| Helston | 0.0% | 0.0% | 0.0% | 14.5% | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| Other Stores | 21.6% | 26.3% | 12.5% | 7.3% | 0.0% | 0.0% | 0.0% | 1.9% | 2.3% | 0.7% | 0.0% | 1.3% | 1.9% | 1.0% | 8.9% | 0.9% | 6.2% | 12.3% | 59.0% | 46.1% | 3.2% | 11.2% | 32.0% | 98.4% | 80.3% | 72.2% | 17.5% | 6.3% | 0.0% | 5.9% | 1.9% | 6.0% | 4.3% | 0.0% | 5.5% | 0.0% | 2.1% | 4.2% | 1.5% | 4.2% | 8.9% | 1.1% | 3.8% | 15.5% | 32.9% | 29.8% | 15.7% | 7.0% | 32.1% | 83.6% | 72.2% | 80.3% | 0.0% | 0.0% | 0.0% |
| Internet / Mail Order | 2.1% | 0.0% | 2.9% | 2.1% | 1.1% | 0.9% | 0.0% | 1.5% | 0.0% | 3.8% | 1.3% | 0.0% | 4.0% | 1.8% | 0.0% | 3.6% | 0.5% | 3.7% | 4.0% | 3.9% | 5.4% | 4.5% | 3.5% | 1.3% | 5.8% | 4.9% | 14.7% | 6.8% | 3.0% | 6.8% | 4.8% | 10.6% | 9.0% | 6.0% | 6.1% | 13.0% | 4.6% | 10.6% | 19.1% | 5.3% | 20.8% | 15.0% | 17.0% | 9.3% | 7.7% | 0.0% | 15.5% | 6.3% | 7.6% | 12.2% | 2.6% | 6.6% | 0.0% | 0.0% | 0.0% |

Notes:

TABLE 6: COMPARISON GOODS MARKET SHARE, BY ZONE

| | Clothes, footwear and fashion - 1st choice destination | | | | | | | | | | | | | | | | | | | | | | | | | | Clothes, footwear and fashion - 2nd choice | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|-----------------------|--|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|------|------|------|------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 19 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 19 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | | | | |
| Falmouth & Penryn | 1.1% | 0.0% | 0.5% | 3.1% | 28.3% | 0.0% | 2.8% | 0.5% | 1.5% | 1.5% | 0.7% | 0.0% | 0.0% | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.3% | 0.0% | 2.4% | 12.9% | 34.5% | 2.4% | 5.8% | 5.6% | 10.5% | 6.9% | 2.3% | 0.0% | 0.0% | 0.6% | 0.0% | 0.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | | | | | |
| St Austell | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% | 0.0% | 3.4% | 2.0% | 31.3% | 29.4% | 5.9% | 5.9% | 1.8% | 0.0% | 0.0% | 0.0% | 1.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.8% | 0.0% | 1.1% | 25.8% | 10.6% | 29.6% | 21.0% | 13.3% | 4.8% | 5.8% | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | | | | | | | |
| Truro | 20.1% | 34.2% | 22.3% | 44.1% | 39.3% | 48.0% | 49.8% | 54.0% | 61.1% | 81.1% | 83.8% | 73.4% | 62.5% | 40.5% | 28.8% | 30.9% | 41.5% | 6.0% | 0.9% | 0.9% | 4.6% | 11.7% | 1.3% | 0.5% | 0.0% | 0.0% | 30.9% | 33.0% | 26.9% | 23.4% | 35.5% | 25.6% | 32.5% | 27.4% | 32.8% | 19.9% | 25.9% | 23.2% | 28.7% | 29.0% | 39.2% | 25.9% | 34.0% | 5.6% | 4.0% | 5.6% | 8.3% | 8.9% | 3.0% | 2.2% | 0.0% | 3.0% | | | | |
| Penzance | 47.3% | 21.6% | 20.8% | 2.9% | 0.0% | 0.5% | 1.0% | 1.5% | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 29.5% | 5.9% | 22.9% | 10.2% | 0.0% | 11.3% | 5.9% | 5.4% | 3.6% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | |
| Bodmin | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.6% | 0.3% | 5.3% | 20.4% | 4.2% | 7.6% | 0.0% | 0.0% | 0.9% | 9.5% | 2.3% | 0.3% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.1% | 2.7% | 2.0% | 17.6% | 6.4% | 11.5% | 0.0% | 0.0% | 2.1% | 29.4% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | |
| Camborne | 0.0% | 1.2% | 1.1% | 0.3% | 1.0% | 12.4% | 4.2% | 1.5% | 1.1% | 0.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.4% | 0.0% | 4.8% | 0.8% | 0.0% | 17.6% | 7.5% | 4.5% | 1.8% | 0.0% | 2.3% | 0.0% | 1.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | | |
| Hayle | 10.4% | 15.6% | 17.8% | 3.6% | 0.0% | 10.9% | 6.3% | 2.3% | 1.2% | 0.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 9.8% | 10.8% | 19.1% | 4.2% | 2.5% | 14.9% | 8.1% | 9.8% | 11.2% | 0.0% | 1.1% | 0.0% | 0.0% | 0.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | |
| Wadebridge | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.4% | 0.0% | 0.0% | 5.7% | 15.6% | 0.0% | 0.0% | 0.0% | 0.0% | 6.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.1% | 0.0% | 0.0% | 2.5% | 0.0% | 0.0% | 0.0% | 5.2% | 20.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 7.5% | 0.0% | 2.8% | 0.0% | 0.0% | | | |
| Launceston | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% | 0.0% | 0.0% | 0.7% | 0.0% | 1.3% | 15.7% | 5.9% | 3.5% | 0.0% | 1.1% | 3.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.8% | 0.0% | 8.4% | 14.7% | 6.2% | 6.7% | 0.0% | 8.9% | 4.9% | | | | | | |
| Redruth | 0.0% | 0.0% | 0.0% | 0.5% | 0.0% | 0.7% | 7.6% | 14.1% | 13.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.0% | 2.3% | 0.0% | 0.0% | 0.7% | 1.3% | 12.4% | 12.3% | 10.5% | 0.7% | 2.7% | 0.0% | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | |
| Liskeard | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.3% | 0.4% | 12.3% | 1.1% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.6% | 3.0% | 1.1% | 0.0% | 10.6% | 6.3% | 2.3% | 0.0% | 1.5% | 0.0% | 0.0% | 1.8% | 0.0% | | | | |
| Newquay | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.7% | 0.0% | 12.6% | 0.0% | 0.0% | 0.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.0% | 0.0% | 1.0% | 7.5% | 0.0% | 11.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | | |
| Looe | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | |
| Saltash | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.8% | 8.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.9% | 0.0% | 0.0% | | | | |
| Camelford | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | | |
| Padstow | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.7% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 3.7% | 0.0% | 0.0% | 0.0% | 0.0% | 1.5% | 0.0% | 0.0% | 0.0% | 0.0% | | | | |
| Callington | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 1.2% | 1.1% | 4.2% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | |
| St Ives | 0.4% | 5.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 2.6% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | | |
| Torpoint | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.9% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| Pool | 0.0% | 0.0% | 0.5% | 0.0% | 0.0% | 2.1% | 1.3% | 0.5% | 1.4% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 4.0% | 0.5% | 0.0% | 0.0% | 1.0% | 2.0% | 0.0% | 1.1% | 1.1% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |
| Bude | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.7% | 10.5% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 5.4% | 8.5% | 0.0% | 0.0% | 2.5% | |
| Helston | 0.0% | 0.0% | 0.0% | 14.7% | 0.4% | 0.7% | 0.0% | 0.0% | 0.8% | 0.4% | 0.0% | 0.7% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | |
| Other Stores | 4.3% | 1.2% | 6.1% | 5.3% | 2.0% | 3.0% | 1.7% | 2.1% | 6.0% | 3.7% | 0.0% | 3.1% | 5.1% | 3.0% | 13.3% | 17.3% | 5.3% | 54.4% | 76.8% | 67.9% | 56.1% | 18.7% | 54.5% | 83.9% | 68.6% | 75.9% | 10.2% | 20.0% | 3.8% | 10.9% | 13.0% | 12.7% | 6.3% | 8.0% | 11.1% | 31.3% | 16.2% | 13.6% | 18.9% | 21.4% | 19.9% | 15.4% | 12.4% | 31.2% | 30.4% | 41.1% | 50.8% | 26.8% | 59.3% | 49.2% | 59.2% | 66.4% | | | | |
| Internet / Mail Order | 16.4% | 21.3% | 31.0% | 25.4% | 28.9% | 21.6% | 25.3% | 22.9% | 13.0% | 10.9% | 14.8% | 19.3% | 15.7% | 24.3% | 23.2% | 19.5% | 25.8% | 15.3% | 17.6% | 25.0% | 22.7% | 45.8% | 27.9% | 14.8% | 30.3% | 20.6% | 14.7% | 25.5% | 16.1% | 21.9% | 12.7% | 14.3% | 20.5% | 23.0% | 14.0% | 38.3% | 39.6% | 32.7% | 27.2% | 13.9% | 15.0% | 21.0% | 17.7% | 30.0% | 49.2% | 40.7% | 23.3% | 10.7% | 17.7% | 45.0% | 30.1% | 23.1% | | | | |

Notes: market shares taken from Cornwall Household Survey 2014.

TABLE 8: CONVENIENCE GOODS BENCHMARK TURNOVER, 2014

| STORE / LOCATION | FLOORSPACE (sq m net) | | CONV GOODS SALES DENSITY (£/sq m) | TOTAL CONVENIENCE GOODS TURNOVER (£m) |
|---------------------------------------|-----------------------|-------------------------|-----------------------------------|---------------------------------------|
| | Total Net Sales | Convenience Goods Sales | | |
| FALMOUTH & PENRYN | | | | |
| Asda, Penryn | 4180 | 2972 | 13350 | 39.7 |
| Tesco, Killigrew Street, Falmouth | 717 | 645 | 11619 | 7.5 |
| Sainsburys, Ponsharden, Falmouth | 2113 | 1796 | 12181 | 21.9 |
| Iceland, Berkeley Vale, Falmouth | 432 | 384 | 7313 | 2.8 |
| Marks & Spencer, Falmouth | | 465 | 11119 | 5.2 |
| Lidl, Penryn | 1063 | 850.4 | 3900 | 3.3 |
| Tesco Express, Discovery Quay | 292 | 262.8 | 11619 | 3.1 |
| Other town centre | | 1932 | 4500 | 8.7 |
| Other | | 500 | 4000 | 2.0 |
| TOTAL | | | | 94.1 |
| PENZANCE | | | | |
| Tesco, Penzance | 1750 | 1516 | 11619 | 17.6 |
| Morrisons, Penzance | 2657 | 2126 | 12857 | 27.3 |
| Sainsburys, Penzance | 4645 | 3019 | 12181 | 36.8 |
| Co-op, Market Jew Street | 401 | 361 | 7823 | 2.8 |
| Co-op, Parade Street | 210 | 189 | 7823 | 1.5 |
| Tesco Express, Market Jew Street | 190 | 171 | 11619 | 2.0 |
| Lidl, Penzance | 875 | 700 | 3900 | 2.7 |
| Iceland, Wharfside, Penzance | 467 | 420 | 7313 | 3.1 |
| Other town centre | | 2138 | 4500 | 9.6 |
| Other | | 500 | 4000 | 2.0 |
| Co-op, The Strand, Newlyn | 203 | 193 | 7823 | 1.5 |
| Co-op, Wherrytown | 488 | 464 | 7823 | 3.6 |
| TOTAL | | | | 110.6 |
| LISKEARD | | | | |
| Morrisons, Liskeard | 2461 | 1969 | 12857 | 25.3 |
| Aldi, Liskeard | 952 | 762 | 7436 | 5.7 |
| Co-op, Barras Street | 678 | 610 | 7823 | 4.8 |
| Other | | 670 | 4500 | 3.0 |
| TOTAL | | | | 38.8 |
| WADEBRIDGE | | | | |
| Tesco, Wadebridge | 2282 | 1720 | 11619 | 20.0 |
| Co-op, Wadebridge | 1137 | 966 | 7823 | 7.6 |
| Lidl, Wadebridge | 1129 | 903 | 3900 | 3.5 |
| Other | | 969 | 4500 | 4.4 |
| TOTAL | | | | 35.4 |
| HELSTON | | | | |
| Tesco, Helston | 4377 | 2785 | 11619 | 32.4 |
| Sainsburys, Helston | 2759 | 1931 | 12181 | 23.5 |
| Co-op, Helston | 997 | 848 | 7823 | 6.6 |
| Lidl, Helston | 1286 | 1029 | 3900 | 4.0 |
| Other, Helston town centre | | 1123 | 4500 | 5.1 |
| TOTAL | | | | 71.6 |
| CAMBORNE, POOL & REDRUTH | | | | |
| Tesco, Wesley Street, Camborne | 1924 | 1635 | 11619 | 19.0 |
| Iceland, Trelowarren Street, Camborne | 434 | 412 | 7313 | 3.0 |
| Aldi, Church Street, Camborne | 896 | 806 | 7436 | 6.0 |
| Lidl | 1063 | 850 | 3900 | 3.3 |
| Other Camborne town centre | 1045 | 993 | 4500 | 4.5 |
| other | | 250 | 4000 | 1.0 |
| Tesco Extra, Pool | 6503 | 3252 | 11619 | 37.8 |
| Morrisons, Pool | 2807 | 2386 | 12857 | 30.7 |
| Other Pool | 250 | 250 | 4000 | 1.0 |
| Tesco, Tolgus Hill, Redruth | 2183 | 1856 | 11619 | 21.6 |
| Iceland, Fore Street, Redruth | 455 | 455 | 7313 | 3.3 |
| Other Redruth town centre | 1268 | 1141 | 4500 | 5.1 |
| Other | 250 | 250 | 4000 | 1.0 |
| TOTAL | | | | 137.3 |
| NEWQUAY | | | | |
| Morrisons, Newquay | 2787 | 2230 | 12857 | 28.7 |
| Sainsburys, Fore Street, Newquay | 1431 | 1216 | 12181 | 14.8 |
| ASDA, Oakleigh Terrace, Newquay | 1200 | 1020 | 13350 | 13.6 |
| Aldi, Newquay | 760 | 646 | 7436 | 4.8 |
| Tesco Express (town centre) | 320 | 288 | 11619 | 3.3 |
| Lidl | 929 | 743 | 3900 | 2.9 |
| Other Newquay town centre | 1377 | 1308 | 4500 | 5.9 |
| Other | 500 | 500 | 4000 | 2.0 |
| TOTAL | | | | 76.0 |
| LAUNCESTON | | | | |
| Tesco, Launceston | 2282 | 1452 | 11619 | 16.9 |
| Lidl Launceston | 929 | 743 | 3900 | 2.9 |
| Co-op, Broad Street, Launceston | 210 | 200 | 7823 | 1.6 |
| Co-op, Newport Ind Estate | 880 | 792 | 7823 | 6.2 |
| Other | 501 | 476 | 4500 | 2.1 |
| TOTAL | | | | 29.7 |
| BODMIN | | | | |
| Asda, Bodmin | 3188 | 1913 | 13350 | 25.5 |
| Morrisons, Bodmin | 2304 | 1843 | 12857 | 23.7 |
| Sainsburys, Bodmin | 1922 | 1538 | 12181 | 18.7 |
| Iceland, Bodmin | 314 | 298 | 7313 | 2.2 |
| Lidl, Bodmin | 1070 | 856 | 3900 | 3.3 |
| Other Bodmin town centre | 960 | 912 | 4500 | 4.1 |
| Other | 500 | 500 | 4000 | 2.0 |
| TOTAL | | | | 79.6 |
| BUDE | | | | |
| Morrisons, Bude | | 1687 | 12857 | 21.7 |
| Sainsburys, Bude | | 843 | 12181 | 10.3 |
| Co-op, Bude | | 540 | 7823 | 4.2 |
| Other | | 923 | 4500 | 4.2 |
| TOTAL | | | | 40.3 |
| ST AUSTELL | | | | |
| Asda, St Austell | | 2822 | 13350 | 37.7 |
| Tesco, St Austell | | 1817 | 11619 | 21.1 |
| Co-op, West Hill, St Austell | | 937 | 7823 | 7.3 |
| Co-op, Slades Road | | 251 | 7823 | 2.0 |
| Co-op, Middleway, St Blazey | | 580 | 7823 | 4.5 |
| Aldi, St Austell | | 700 | 7436 | 5.2 |
| Lidl, St Austell | | 650 | 3900 | 2.5 |
| Other St Austell town centre | | 1655 | 4500 | 7.4 |
| Other (St Austell / St Blazey / Par) | | 1200 | 4000 | 4.8 |
| Iceland, St Austell | | 306 | 7313 | 2.2 |
| TOTAL | | | | 94.8 |
| SALTASH | | | | |
| Waitrose, Saltash | 2780 | 2224 | 12561 | 27.9 |
| Lidl, Saltash | | 1029 | 3900 | 4.0 |
| Co-op, Saltash | 495 | 446 | 7823 | 3.5 |
| Other | 770 | 732 | 4500 | 3.3 |
| TOTAL | | | | 38.7 |
| ST IVES | | | | |
| Co-op, Royal Square | 170 | 162 | 7823 | 1.3 |
| Co-op, The Stennack | 234 | 223 | 7823 | 1.7 |
| Tesco, Carbis Bay | 1,578 | 1,263 | 11619 | 14.7 |
| Co-op, Iregenna Place, St Ives | 260 | 247 | 7823 | 1.9 |
| Other stores, Carbis Bay | 312 | 296 | 4000 | 1.2 |
| Other stores, St Ives | 897 | 1,220 | 4500 | 5.5 |
| TOTAL | | | | 26.3 |
| HAYLE | | | | |
| Co-op, Hayle | 995 | 895 | 7823 | 7.0 |
| Lidl, Hayle | | 1126 | 3900 | 4.4 |
| Marks & Spencer, Hayle | | 558 | 11119 | 6.2 |
| Other | | 530 | 4500 | 2.4 |
| TOTAL | | | | 20.0 |
| TRURO | | | | |
| Tesco, Truro | 3587 | 2511 | 11619 | 29.2 |
| Sainsburys, Truro | 5891 | 3694 | 12181 | 45.0 |
| Aldi, Truro | 760 | 616 | 7439 | 4.6 |
| Co-op, Boscowen Street, Truro | 583 | 496 | 7823 | 3.9 |
| Marks & Spencer, Truro | 1394 | 1324 | 11119 | 14.7 |
| Iceland, Truro | 430 | 409 | 7313 | 3.0 |
| Other Truro city centre | 1292 | 1227.4 | 4500 | 5.5 |
| Other | | 300 | 4000 | 1.2 |
| TOTAL | | | | 107.1 |

Notes:

floorpace data taken from IGD, Cornwall Council, GVA and GOAD data

sales density information for specific operators derived from Mintel and Verdict research. Densities for other (unspecified) convenience stores based on GVA experience

TABLE 8b: RETAIL FLOORSPACE COMMITMENTS

| COMMITMENT | FLOORSPACE (sq m net) | SALES DENSITY (£/sq m) | TOTAL TURNOVER (£m) |
|-----------------------------------|--------------------------|---------------------------|------------------------|
| CONVENIENCE | | | |
| PENZANCE | | | |
| Lidl | 280.8 | £3,900 | £1.1 |
| Gas Works site | 304.5 | £5,000 | £1.5 |
| HAYLE | | | |
| ASDA | 1785 | £13,350 | £23.8 |
| North Quay | 350 | £7,500 | £2.6 |
| CPR | | | |
| East Hill | 440 | £7,500 | £3.3 |
| Trevenson Park South (Phase 1) | 414 | £7,500 | £3.1 |
| Corner Plot, Camborne RP | 372 | £7,500 | £2.8 |
| Rowe Bowl | 304 | £7,500 | £2.3 |
| Dudnance Lane / Station Road | 258 | £7,500 | £1.9 |
| FALMOUTH & PENRYN | | | |
| New Sainsburys (increase) | 2119 | £12,181 | £25.8 |
| TRURO | | | |
| Hendra site | 400 | £7,500 | £3.0 |
| Waitrose / Taste of Cornwall | 1850 | £12,561 | £23.2 |
| Langarth Farm | 400 | £7,500 | £3.0 |
| NEWQUAY | | | |
| Trevithick Manor | 1990 | £12,000 | £23.9 |
| Newquay Growth Area | 3019 | £12,000 | £36.2 |
| Newquay Growth Area | 1078 | £7,500 | £8.1 |
| ST AUSTELL | | | |
| Tesco extension | 1195 | £11,619 | £13.9 |
| Morrisons | 2135 | £12,857 | £27.4 |
| BODMIN | | | |
| Dunmere Road | 480 | £7,500 | £3.6 |
| WADEBRIDGE | | | |
| Sainsburys | 2237 | £12,181 | £27.2 |
| Tesco extension | 500 | £11,619 | £5.8 |
| Land South of Travelodge | 1110 | £7,500 | £8.3 |
| BUDE | | | |
| Discount Foodstore, Binhamy Farm | 975.2 | £3,900 | £3.8 |
| LAUNCESTON | | | |
| Morrisons | 1742 | £12,857 | £22.4 |
| LISKEARD | | | |
| Morrisons extension | 315 | £12,857 | £4.0 |
| Barras Place | 584 | £7,500 | £4.4 |
| SALTASH | | | |
| Tesco | 1583 | £11,619 | £18.4 |
| ST COLUMB MAJOR | | | |
| Supermarket | 1600 | £12,000 | £19.2 |
| CAMELFORD | | | |
| Victoria Road Supermarket | 1400 | £12,000 | £16.8 |
| FRADDON | | | |
| Kingsley Village | 500 | £12,000 | £6.0 |
| COMPARISON | | | |
| PENZANCE | | | |
| Lidl | 70.2 | £3,900 | £0.3 |
| Gas Works site | 304.5 | £5,000 | £1.5 |
| The Range | 2787 | £2,500 | £7.0 |
| HAYLE | | | |
| ASDA | 765 | £8,511 | £6.5 |
| North Quay | 350 | £5,000 | £1.8 |
| Foundry Yard | 1256 | £5,000 | £6.3 |
| South Quay | 264 | £5,000 | £1.3 |
| CPR | | | |
| East Hill | 440 | £5,000 | £2.2 |
| Trevenson Park South (Phase 1) | 414 | £5,000 | £2.1 |
| Corner Plot, Camborne RP | 372 | £5,000 | £1.9 |
| Rowe Bowl | 304 | £5,000 | £1.5 |
| Dudnance Lane / Station Road | 258 | £5,000 | £1.3 |
| FALMOUTH & PENRYN | | | |
| New Sainsburys (increase) | 2489 | £9,941 | £24.7 |
| Conversion of Existing Sainsburys | 2113 | £4,000 | £8.5 |
| Kernick Road | 1463 | £5,000 | £7.3 |
| TRURO | | | |
| Lemon Quay refurbishment | 2606 | £5,000 | £13.0 |
| Oak Tree Inn | 1710 | £5,000 | £8.5 |
| The Range (mezzanine floor) | 1466 | £2,500 | £3.7 |
| Hendra site | 400 | £5,000 | £2.0 |
| Waitrose / Taste of Cornwall | 150 | £6,990 | £1.0 |
| Langarth Farm | 400 | £5,000 | £2.0 |
| PC World unit (mezzanine floor) | 648 | £6,697 | £4.3 |
| NEWQUAY | | | |
| Trevithick Manor | 8890 | £4,500 | £40.0 |
| Newquay Growth Area | 3404 | £5,000 | £17.0 |
| Land adjacent to Morrisons | 2264 | £5,000 | £11.3 |
| Treloggan Road | 3865 | £5,000 | £19.3 |
| ST AUSTELL | | | |
| Tesco extension | 2074 | £11,716 | £24.3 |
| Morrisons | 710 | £9,310 | £6.6 |
| Penwinnick Road | 218 | £5,000 | £1.1 |
| BODMIN | | | |
| Dunmere Road | 480 | £5,000 | £2.4 |
| WADEBRIDGE | | | |
| Sainsburys | 559 | £9,942 | £5.6 |
| Tesco extension | 348 | £11,716 | £4.1 |
| Land South of Travelodge | 1892 | £5,000 | £9.5 |
| Bude | | | |
| Discount Foodstore, Binhamy Farm | 243.8 | £3,900 | £1.0 |
| Bulky Goods Units, Binhamy Farm | 1927 | £4,000 | £7.7 |
| LAUNCESTON | | | |
| Morrisons | 581 | £9,310 | £5.4 |
| LISKEARD | | | |
| Morrisons extension | 84 | £9,310 | £0.8 |
| Barras Place | 584 | £5,000 | £2.9 |
| SALTASH | | | |
| Tesco | 372 | £11,716 | £4.4 |
| Parkway Industrial Estate | 1512 | £4,000 | £6.0 |
| CAMELFORD | | | |
| Victoria Road Supermarket | 600 | £9,000 | £5.4 |
| ST COLUMB MAJOR | | | |
| Supermarket | 400 | £9,000 | £3.6 |
| FRADDON | | | |
| Kingsley Village | 1129 | £4,325 | £4.9 |

Notes: