

Cornwall Monitoring Report

Saltash Town Report

December 2017

Saltash Town Report 2017

1 Saltash Town Centre Survey

1.1 The annual survey of town centre uses was undertaken for Saltash in June 2017. A map and tables detailing the town centre uses including the health check data (by street) are appended to this report.

1.2 Saltash is known as the 'gateway to Cornwall', as it lies just across the River Tamar from Plymouth. It is a flourishing modern town with historic roots stretching back to the 12th century. Saltash is the second smallest centre after Hayle with 129 units. The quantity of units by use class has been surveyed over the last 6 years and is recorded in Table 1 below.

Table 1 Saltash Town Centre Uses

| Survey Year | A1 | A2 | A3 | A4 | A5 | B1a | D1 | D2 | Vacant | Other | Total | % Vacant | % Vacant Cornwall |
|-------------|----|----|----|----|----|-----|----|----|--------|-------|-------|----------|-------------------|
| 2017 | 77 | 12 | 8 | 2 | 6 | 3 | 9 | 2 | 7 | 3 | 129 | 5.4 | 9.6 |
| 2016 | 74 | 12 | 8 | 2 | 6 | 4 | 8 | 2 | 8 | 4 | 128 | 6.3 | 9.4 |
| 2015 | 76 | 14 | 8 | 2 | 6 | 1 | 8 | 2 | 4 | 4 | 125 | 3.2 | 9.1 |
| 2014 | 76 | 20 | 7 | 2 | 7 | 2 | 7 | 2 | 2 | 1 | 126 | 1.6 | 8.4 |
| 2013 | 70 | 19 | 6 | 2 | 5 | 2 | 7 | 2 | 12 | 2 | 127 | 9.4 | 8.8 |
| 2012 | 71 | 17 | 7 | 3 | 4 | 4 | 2 | 3 | 9 | 4 | 124 | 7.3 | 8.7 |

1.3 In terms of its share of A1 uses, unlike many Cornish town centres, Saltash has seen an increase in its share with 60% of all town centre uses. It has one of the highest proportions of A1 uses behind only St Ives. The same applies to its proportion of A1 uses within the Prime Shopping Area which has strengthened from 55% in 2013 to 60% this year, in response to the gain of A1 units over the timeframe.

1.4 Notable changes to the town has been the closure of 2 of its high street banks in 2016; HSBC and Natwest, leaving just 2 remaining banks to serve the town. A charity shop now occupies the former HSBC premises whilst the Natwest building remains empty. Saltash has a high proportion of independent traders and has a town centre Co-op for the main convenience goods offer. Vacancy rates have fluctuated over the last four years peaking in 2013. Despite increasing last year it recovered this year to 5% below the average for Cornwall.

Convenience, Comparison and Service uses within the Town Centre

1.5 To measure the diversity of a town centre the A class retail element is split into three main categories; convenience, comparison and service uses. The

'health' of a town can be monitored by tracking the proportion of these sectors over time and comparisons with other towns can be made. This method therefore excludes the non-retail premises such as community and leisure facilities (D2), clinics and surgeries (D1) and B1a offices, hence reducing the number of units monitored.

1.6 The results from the surveys conducted over the last 6 years can be seen in Table 2 below. The table shows a net gain of one unit due to the subdivision of a unit along Lower Fore Street with a total of 115 units included in Saltash this year. The share of convenience uses has remained consistent over the last couple of years and is higher than both the Cornish and national averages. Despite a Premier convenience store closing a new health food shop opened maintaining the number of convenience units at 11 held for the past 3 years. The comparison sector improved this year after last year's dip with the opening of a second hand electrical shop, an embroidery shop, a gift shop and a bear workshop opened. The town lost its bathroom & kitchen shop and its Field Leisure store resulting in an overall gain of 2 comparison stores. Whilst this sector has improved it remains below the Cornwall average. Saltash has a higher than average service sector with 46.1% and is in third place after Hayle and Helston.

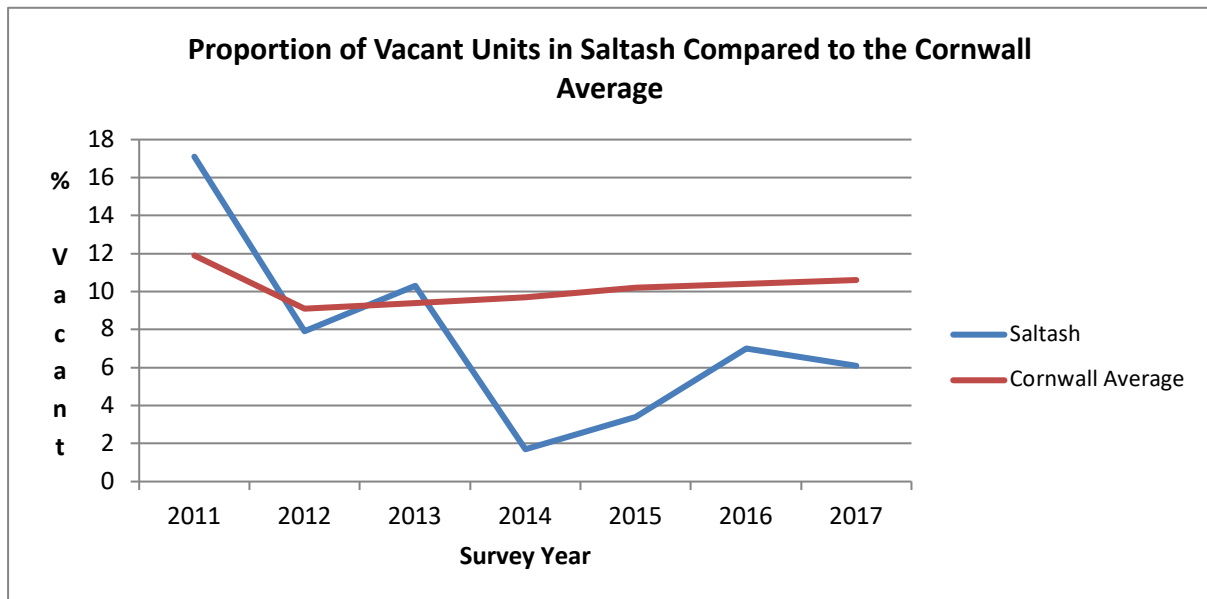
Table 2 Retail Sectors of Saltash Town Centre 2012-17

| Sector | 2012 | | 2013 | | 2014 | | 2015 | | 2016 | | 2017 | | Cornwall Average 2017 | National Average 2017 |
|---------------|------|------|------|------|------|------|------|------|------|------|------|------|-----------------------|-----------------------|
| | No | % | No | % | No | % | No | % | No | % | No | % | % | % |
| Convenience | 11 | 9.7 | 10 | 8.6 | 9 | 7.8 | 11 | 9.5 | 11 | 9.6 | 11 | 9.6 | 8.2 | 9.4 |
| Comparison | 42 | 36.8 | 43 | 37.1 | 49 | 42.2 | 47 | 40.5 | 42 | 36.8 | 44 | 38.3 | 39.4 | 39.0 |
| Service | 52 | 45.6 | 51 | 44 | 56 | 48.3 | 54 | 46.6 | 53 | 46.5 | 53 | 46.1 | 40.8 | 38.3 |
| Vacant | 9 | 7.9 | 12 | 10.3 | 2 | 1.7 | 4 | 3.4 | 8 | 7 | 7 | 6.1 | 10.7 | 12.1 |
| Miscellaneous | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.9 | 1.2 |
| Total | 114 | 100 | 116 | 100 | 116 | 100 | 116 | 100 | 114 | 100 | 115 | 100 | 100 | 100 |

Source: GOAD data 2012 CC Town Centre Surveys: 2013 - 2017 GOAD National Average 2017

1.7 Using the vacancy rates in Table 2 a graph can be plotted to track the changes to the vacancy rate over the last 6 years and compare it with the Cornwall average. It shows there has been a significant fall in vacancy rates between 2011 and 2012 and again between 2013 and 2014. This is in part due to the small overall numbers involved that result in disproportionate shifts in the percentage share. This is particularly true for Saltash and Hayle which are the smallest towns in Cornwall with 115 and 106 units respectively. Despite the small fluctuations, the overall trend is that the town has maintained a lower than average vacancy rate for the past 4 years. Of the 7 vacant units counted this year, 5 of the units were occupied the previous year. Saltash has the second

lowest vacancy score (after St Ives) out of all the towns with 6.1%, 4.5% below the Cornwall average recorded this year.



GOAD 2011 CC data 2012-17 (Health Check Data)

Retail Representation

1.8 The number of major multiple retailers within Saltash remains low with only two represented and this is unchanged on last year. The town has Boots and Superdrug stores and ranks 12th alongside Hayle and Liskeard in Cornwall's retail hierarchy in terms of the major multiple retailers as identified by Experian GOAD.

Out of Town Centre Retail Provision

1.9 There are two out of town supermarkets to the north of Saltash located around the Carkeel roundabout, the principle intersection of the A38 and the A388 Callington Road on the edge of the town. Saltash formerly had had the only Waitrose store in Cornwall (now joined by Truro which opened its store in June 2016). It is located on the edge of the Tamar View Industrial Estate and accommodates 2,780 sqm of retail floor space after completing its extension in 2009. A B&M store exists on the adjacent site. There is also a Lidl store on Gilston Road, south of the Carkeel roundabout which after its extension in 2013 now provides 1000 sqm of retail floor space.

2 Significant Decisions made in the last year

2.1 No significant planning decisions have been made for retail development within the past year. However, in 2014, a Tesco food store was approved at Planning Committee (PA10/04741) on the site of Sanford Suzuki, Saltash Industrial Estate, Gilston Road. Permission was granted for a store with a gross

floor area of 3300 sq. m (2272sq m net), with a convenience (1583sqm) / comparison (372sqm) split. After a confirmed material start the proposal remains extant although Tesco has pulled out of developing the 3.5acre site. Pre-application advice has been sought for a mixed used scheme with 4 units comprising of an Aldi, a drive thru restaurant and 2 non-food units. (PA17/01913/PREAPP).

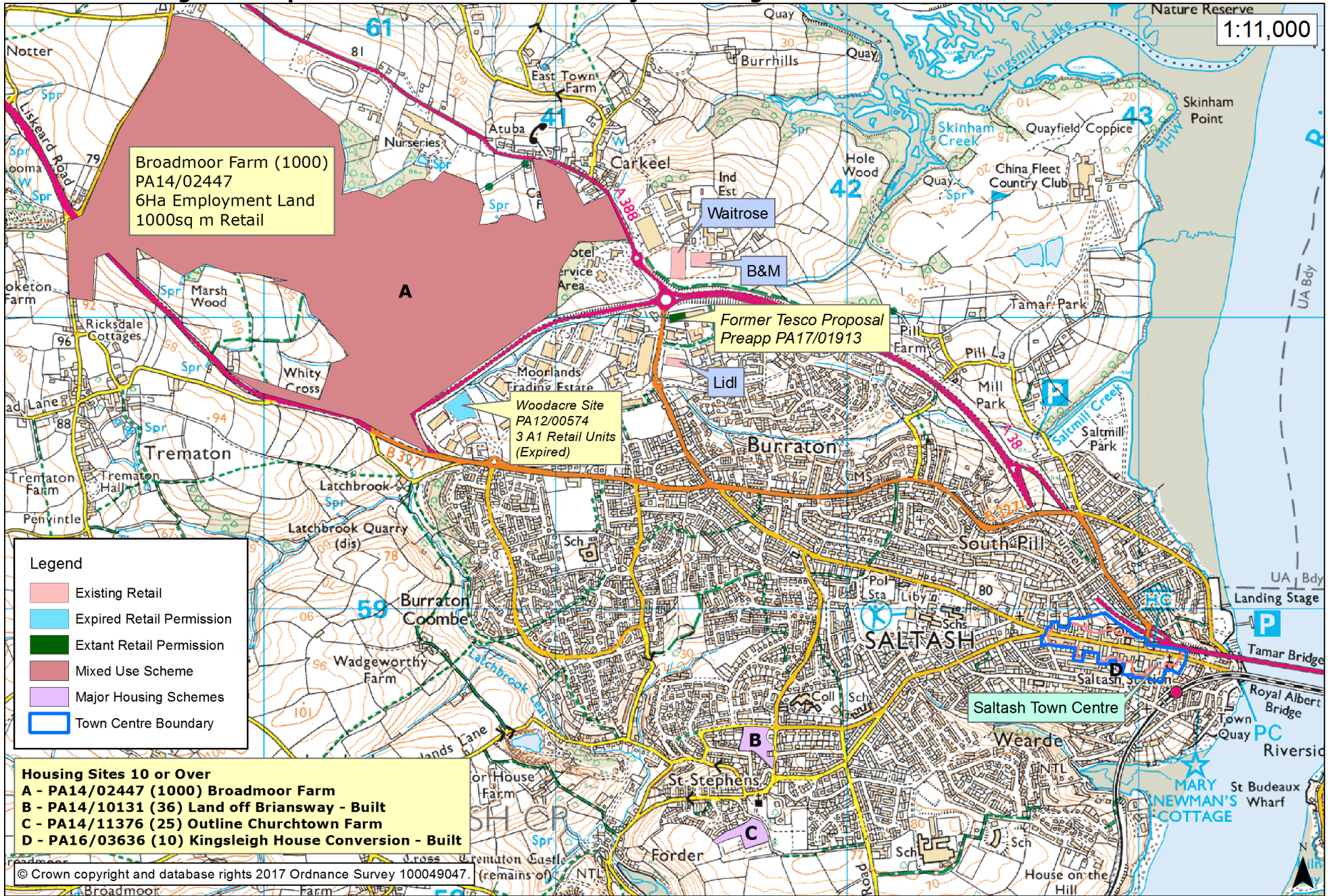
2.2 A major urban extension scheme has just gained outline planning permission under (PA14/02447) this October at Broadmoor Farm for a mix of uses including 1000 homes, 60 bed hotel, 80 bed care home or 50 sheltered apartments, 6 hectares of employment land and a neighbourhood centre with up to 1000 sq m of retail uses. Permission also includes a primary school, sports facilities and a variety of open space such as allotments, orchards and play areas. This site is allocated within the emerging Site Allocation DPD coded SLT-UE1 and SLT-E1.

2.3 Other housing sites of 10 or more homes around Saltash include: PA14/11376 has outline permission for 25 homes (10 affordable), 36 affordable homes on land off Briansway completed this autumn; and lastly PA16/03636 for the Grade II Listed former care home at Kingsleigh House which completed its conversion to 10 flats at the beginning of this year. The map below shows the sites discussed.

Saltash Existing and Proposed Retail Provision and Major Housing Schemes

November 2017

1:11,000



3 Local Plan Retail Capacity Targets

3.1 The Local Plan retail capacity targets for Saltash over the Plan period are shown in Table 3 below. They take into account the Waitrose and Lidl extensions and the Tesco commitment and forecast a modest capacity level by 2030 of 1,000sq m net. Potentially should the Tesco site not be sold to another supermarket chain these projections would need to be adjusted by the permitted convenience floor space quoted in the Tesco application, i.e. 1583sqm net or indeed reduced to reflect the Aldi proposal for 1254sqm sales area.

Table 3 Local Plan Capacity Targets (sq m net)

| | 2014 | 2019 | 2024 | 2030 |
|-------------|-------------|-------------|-------------|-------------|
| Convenience | -1084 | 441 | 719 | 1012 |
| Comparison | -2081 | -99 | 365 | 954 |

3.2 The same applies for the comparison goods floor space capacity as the projections include the Tesco commitment and further commitments at Parkway Industrial Estate. There was permission on the industrial estate to build 3 non-food retail units on vacant land known as the Woodacre site, application PA12/00574, though this has now lapsed. The parking area of this application now has a permitted use by the neighbouring Roger Young Landrover enterprise to serve staff and customers which was agreed under application PA15/08365.

Appendix

Use Class by Street

| Street | A1 | A2 | A3 | A4 | A5 | B1a | D1 | D2 | Vacant | Other | Total |
|----------------------|-----------|-----------|----------|----------|----------|----------|----------|----------|----------|----------|------------|
| Fore Street | 53 | 11 | 3 | 2 | 5 | 2 | 4 | 1 | 4 | 2 | 87 |
| Keats Mews | 6 | | 1 | | | | 2 | | | | 9 |
| Culver Road | 2 | | | | | | | | | | 2 |
| Wesley Road | 2 | | | | | | | | | | 2 |
| St Stephens Road | 2 | | | | | | | | | | 2 |
| Top of the Town Yard | 4 | | 1 | | | | | | | | 5 |
| Regal Court | 3 | 1 | 1 | | 1 | | | | 2 | | 8 |
| Lower Fore Street | 5 | | 2 | | | 1 | 3 | 1 | 1 | 1 | 14 |
| Total | 77 | 12 | 8 | 2 | 6 | 3 | 9 | 2 | 7 | 3 | 129 |
| Percentage | 59.7 | 9.3 | 6.2 | 1.6 | 4.7 | 2.3 | 7 | 1.6 | 5.4 | 2.3 | 100 |

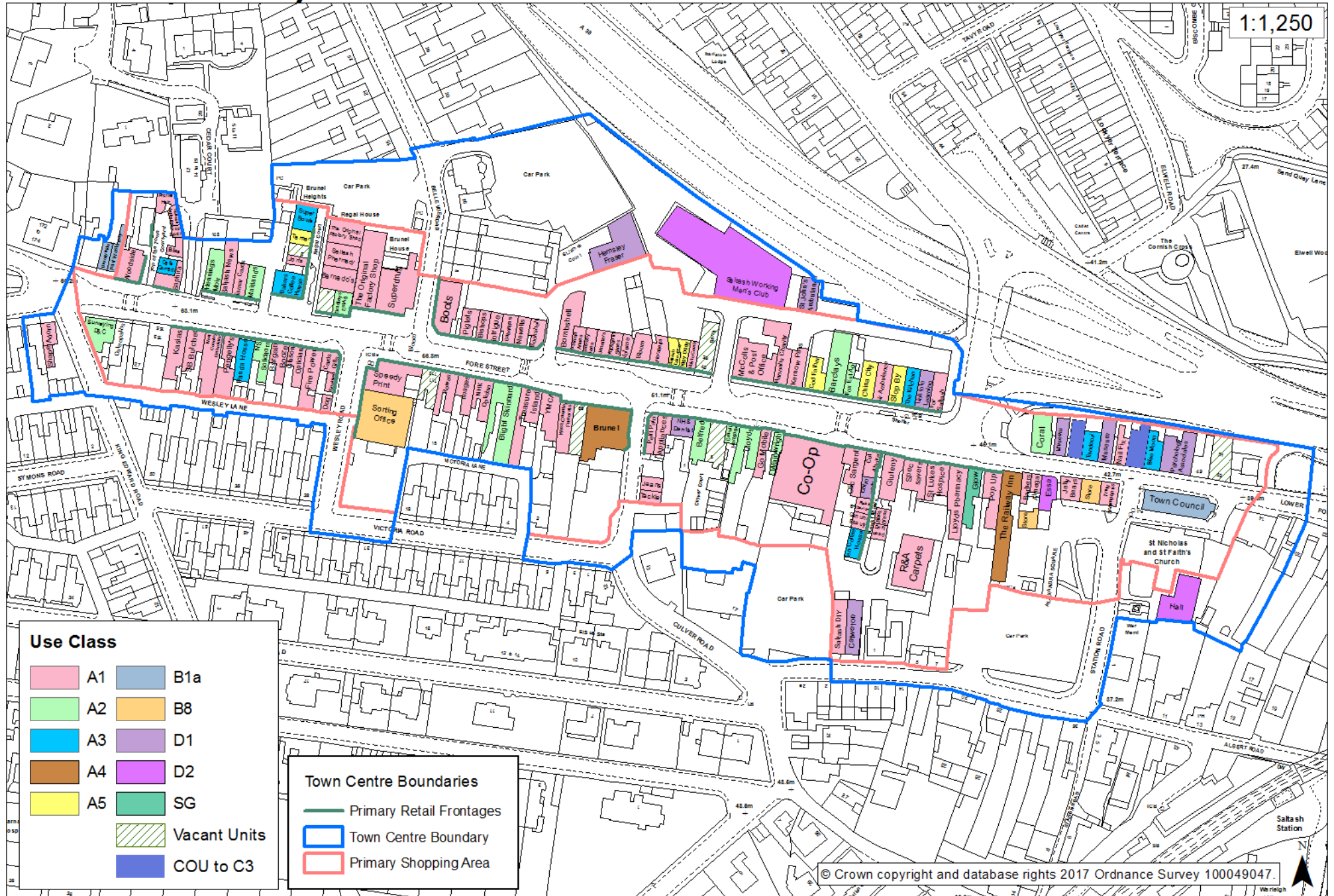
Health Check Sector by Street

| Street | Convenience | Comparison | Service | Vacant | Miscellaneous | Total |
|----------------------|-------------|------------|-----------|----------|---------------|------------|
| Fore Street | 10 | 32 | 34 | 4 | | 80 |
| Keats Mews | | 5 | 2 | | | 7 |
| Culver Road | | 1 | 1 | | | 2 |
| Victoria Road | | | | | | 0 |
| Wesley Road | | 1 | 1 | | | 2 |
| St Stephens Road | | 1 | 1 | | | 2 |
| Top of the Town Yard | | | 5 | | | 5 |
| Regal Court | | 2 | 4 | 2 | | 8 |
| Lower Fore Street | 1 | 2 | 5 | 1 | | 9 |
| Total | 11 | 44 | 53 | 7 | 0 | 115 |
| Percentage | 9.6 | 38.3 | 46.1 | 6.1 | 0.0 | 100 |

Saltash Town Survey

June 2017

1:1,250



Use Class

| | |
|---|---|
| A1 | B1a |
| A2 | B8 |
| A3 | D1 |
| A4 | D2 |
| A5 | SG |
| Vacant Units | |
| COU to C3 | |

Town Centre Boundaries

| |
|---|
| Primary Retail Frontages |
| Town Centre Boundary |
| Primary Shopping Area |

