4.1	**Amount and type of town centre uses floorspace provided (i) within centres (ii) edge of centre (iii) out of centre** (Last Updated: December 2018)

Original Indicator and notes:

4.1	Viability and vitality of retail town centres	Amount and type of town centre uses floorspace provided: (i) within town centre areas (TCA) (ii) edge of centre (iii) out of town areas	Report annual delivery by: (i) town centre areas (ii) edge of centre (iii) out of town areas

Headlines:

- **Vacancy rates in TCAs have increased by 2% since 2013**
- **The number of units within A1 and A2 use within TCAs are on a gradual decline**
- **A3 restaurants and cafes increased in TCAs by 0.8% since 2013 (though no change this year)**
- **Net reduction of -981 sqm convenience and -2710 sqm comparison floorspace within TCAs**
- **Total vacant floorspace increased by 6,885 sqm to 65,834 sqm (gross) within TCAs**
- **Floorspace in edge of centre areas a combined net loss of 615.3 sqm**
- **Delivered in out of town retail areas a combined net gain of 22,144 sqm**

Methodology:

Street surveys of the towns are completed between May and June of each year as a way of maintaining a consistent approach to monitoring the viability and vitality of 16 main towns in Cornwall. The results are used to update town centre maps, use class tables and retail sector tables by street for each town and to calculate the average figures for Cornwall. A detailed town report for each of the centres has been written to document changes over the year including any significant retail and housing developments that may affect a town. The individual town reports can be viewed on the main Cornwall Monitoring Report page.

The amount and type of all town centre uses for each town is shown in Table 1 below. These are added together to calculate the Cornwall average and to monitor any changes to the average. The table does not show the performance of an individual town in comparison to the average so this detail is covered within the corresponding town report.

(i) Amount & Type: Town centre areas

The 6 year trend shows the number of units within town centres is decreasing with a net reduction of 75 units Cornwall-wide since the 2013 survey. Losses can be due to units converting to residential use, amalgamating to create larger units or through demolition or redevelopment. This year, there was an overall net loss of 12 units.

The number of A1 retail units is gradually decreasing by approximately 0.1% per year as found in the previous four annual surveys, increasing to 0.7% this year; amounting to 1.5% overall. A2 uses are also reduced, in part in response to the reclassification of payday lending and betting shops to sui generis (SG) category which took place in time for the 2015 survey resulting in an approximate reduction of 3%

overall. Since then, there has been a small decline of about 0.1% annually. This increased to a 0.5% this year, in part, in response to the closure of many high street banks. (12 since June 2017).

Table 1 *Town centre Uses 2018 and Cornwall Averages 2012-2018 (no. units/ shops)*

Town Centre	A1	A2	A3	A4	A5	B1a	D1	D2	Vacant	SG	Total
Bodmin	82	22	11	6	8	5	10	8	21	8	181
Bude	107	19	20	5	10	2	1	3	10	4	181
Camborne	111	24	13	5	10	5	11	5	41	6	231
Falmouth	196	28	63	17	16	5	11	7	25	7	375
Hayle	64	11	10	4	5	5	5	2	7	4	117
Helston	78	29	13	9	5	6	17	6	20	8	191
Launceston	92	28	12	5	8	3	11	3	22	7	191
Liskeard	82	34	10	5	6	8	18	4	19	7	193
Newquay	144	19	41	13	21	8	8	9	28	22	313
Penzance	214	32	32	13	11	5	13	8	51	10	389
Redruth	94	26	14	5	10	10	20	9	34	6	228
Saltash	77	11	8	2	5	3	11	2	8	3	130
St Austell	98	39	11	6	8	9	16	10	42	12	251
St Ives	195	12	39	10	13	3	11	9	22	6	320
Truro	275	72	54	12	16	36	31	8	60	12	576
Wadebridge	106	18	18	4	6	4	9	4	9	6	184
Total All	**2015**	**424**	**369**	**121**	**158**	**117**	**203**	**97**	**419**	**128**	**4051**
Avg %	**49.7**	**10.5**	**9.1**	**3.0**	**3.9**	**2.9**	**5.0**	**2.4**	**10.3**	**3.2**	**100**
Movement	↓	↓	-	↑	↑	↑	↑	-	↑	↑	↓
2017/18	**50.5**	**11.0**	**9.1**	**2.9**	**3.8**	**2.7**	**4.9**	**2.4**	**9.6**	**3.1**	**4063**
2016/17	**50.6**	**11.1**	**9.0**	**2.9**	**3.8**	**2.7**	**5.0**	**2.4**	**9.4**	**3.1**	**4056**
2015/16	**50.7**	**11.3**	**9.0**	**3.0**	**3.6**	**2.8**	**4.8**	**2.5**	**9.1**	**3.2**	**4116**
2014/15	**50.5**	**13.2**	**8.6**	**3.1**	**3.7**	**2.9**	**4.7**	**2.6**	**8.6**	**2.2**	**4131**
2013/14	**51.2**	**13.5**	**8.3**	**2.9**	**3.5**	**2.9**	**4.5**	**2.6**	**8.4**	**2.2**	**4126**

CC data 2013-2017

In contrast, restaurants, cafes and takeaways (the hot food A3 and A5 uses) have increased over the timeframe with A3 use increasing by 0.8% and the A5 use up by 0.4%. The A4 pubs show a small recovery back to the levels recorded in 2016 with many of them re-opening after being renovated and with micro-breweries gaining in popularity to counterbalance those that have closed.

The number of units vacant (including those closed for refurbishment at the time of the surveys) has been creeping up from 8.4% recorded in 2013 to 10.3% this year: an increase of nearly 2% over 6 years when including all town centre uses.

The amount of vacant floorspace increased by 6,885 sqm (gross) to 65,834 sq m (gross) within the 16 towns monitored compared to last year. Vacant floorspace increased for the majority of towns although some showed improvements such as St Ives with the re-opening of the Tate Gallery although the gains were not so impressive due to the town losing two of its banks and a solicitor's office. The elevated rate in Truro can be in part explained by the closure of B&M and in St Austell part of the Sedgemoor Centre fell vacant and is being converted to residential use. The changes are summarised below along with the retailers with the largest floorspace area to give some meaning to the figures.

Table 2 Vacant Floorspace Sq m (gross) ***Larger Units Named Only***

Centre	2017	2018	Loss/gain	Units Closed	Units Opened
Truro	7345.6	10124.6	-2779	B&M, Whirlwind Sports, Frixon	
Penzance	7720	8682.3	-962.6	Argos	
Falmouth	3053	3003.6	49.4		
St Ives	3674.5	2252.4	1422.1	Lloyds, CVC, NatWest	Tate Gallery
Newquay	3921.5	5375.8	-1454.3	NatWest, Sahara City, Shoe Zone	
St Austell	6917.5	9847	-2929.5	Sedgemoor Centre, Store 21	
Camborne	4364.2	4253.2	111		
Redruth	6490	5599	891		Co-op Funeral Care
Bude	1998.2	1812.1	186.1		
Wadebridge	1054	1119.5	-65.5		
Liskeard	2274	3200.5	-926.6	NatWest, Job Centre	
Launceston	3014	3141.6	-127.7		
Helston	2686.3	3488.6	-802.3	Job Centre, CC One Stop Shop	
Bodmin	1713.5	2637.5	-924	Edinburgh Woollen Mill, NatWest	
Saltash	700.1	722.7	-22.6		
Hayle	2022.2	573.2	1449		Home Bargains
Total	**58948**	**65834**	**-6885**		

(ii) Floorspace provided: Edge of centre areas

The net gains to the amount and type of net floorspace provided on edge of centre locations recorded in 2018 is summarised in the table below. There were very small losses to the convenience and comparison sectors with gains to other town centre uses with the exception of B1a office space. The majority of the loss of office space can be attributed to the change of use of the former Inland Revenue office to residential units on Infirmary Hill, Truro, which accounts for a total loss of 1482 sqm.

A1	A1	A1	A1	A2	A3	A4	A5			
Misc.	**Conv.**	**Comp.**	**Serv.**	**Serv.**	**Serv.**	**Serv.**	**Serv.**	**D2**	**D1**	**B1a**
0	-23.6	-186	319.6	137.6	132	0	0	297.1	271.3	-1563.3

(iii) Floorspace provided: Out of centre areas

The amount and type of net floor space delivered within out of town centre areas (but within the urban boundary of the main towns) for 2018 is shown in the summary table below. There was a combined gain in convenience / comparison floorspace of 7469 sqm and a combined 2195 sqm was also gained within the hot food premises. Substantial gains were attributed to the education sector represented by D1 uses with the completion of Callywith College, Bodmin. The only loss was again from the B1a office category – the majority being converted to residential use. The main loss of 3863 sqm office space was through the demolition of the former Council offices in St Clare, Penzance.

A1	A1	A1	A1	A2	A3	A4	A5			
Misc.	**Conv.**	**Comp.**	**Serv.**	**Serv.**	**Serv.**	**Serv.**	**Serv.**	**D2**	**D1**	**B1a**
0	3706.7	3763	311	175.4	1540.4	103.6	654.9	4515	11299	-3719.2

The majority of convenience and comparison floorspace was delivered within the completion of several out of town retail stores. These include the completion of Pets at Home and £Stretcher within the Former Heliport Retail Park in Penzance and a new replacement Lidl store to the west of the town. A new Lidl store was also completed within the urban area of St Austell. Smaller gains to A1 floorspace were attributed to the division of Unit 1 into 3 units within Launceston Retail Park, through the conversion of the former fire station in Camborne into retail units and from the change of use of Illogan Car Centre into a retail centre.

4.2	Retail service, comparison and convenience floorspace in the main town centres and changes in the proportion of retail uses in Primary Shopping Areas (PSAs) (Last Updated: December 2018)

Original Indicator and notes:

4.2	Viability and vitality of retail town centres	(i) The amount of retail service, comparison and convenience floorspace in the main town centres (ii) The changes in the proportion of retail uses within Primary Shopping Areas	Report as change over time and in relation to the Cornwall average

Headlines:

- **Convenience and Services uses have marginally increased by 0.2% and by 1.1% since 2013**
- **The Comparison sector has declined by 2.8% since 2013**
- **Vacancy rates have increased by 2.2% since 2013**
- **Net loss of convenience floorspace of 981 sqm, net loss of comparison floorspace of 2710 sqm**

Source:

To measure the diversity of a town centre the A Use Class retail element can be split into 3 main categories; convenience, comparison and services uses. The 'health' of a town can be monitored by tracking the proportion of these sectors over time, and comparisons can be made with other towns and with data collected nationally. This method therefore discounts non retail premises such as community and leisure facilities, clinics, surgeries and B1a offices.

(i) Retail convenience, comparison and service floorspace in the main town centres

Table 2 below shows the quantity of units within each sector by town along with its corresponding % sector share. The towns have been sorted in terms of their size and grouped by colour into similar sized centres with the highest or lowest proportions recorded this year highlighted. For example, Wadebridge has the highest proportion of shops within the convenience sector and also has the lowest vacancy rate. Redruth on the other hand, has the lowest comparison sector whilst St Austell recorded the highest vacancy rate of all the centres.

The table also shows the average proportions recorded over the last 6 years and demonstrates very small changes when monitoring Cornwall as a whole. When comparing this year's figures with the data recorded in 2013, there has been a net loss of 62 units overall, (25 in the last year) in terms of the quantity of units. Losses can be attributed to the change of business use to non-retail uses in addition to the reasons mentioned earlier.

There has been little change to the convenience sector with the proportion fluctuating between 8 – 8.5% with an overall increase of 0.2% since 2013. However, the comparison sector has reduced by 144 units over the timeframe reducing by 3.3% overall. There has also been little change to the service sector with a gain of 15 units (1%) but the number of vacant units has gone up by 73 units, gradually increasing each year to 11.6%, 2.2% higher than six years ago.

The individual town reports give the detail on the performance of each centre over time in relation to the changes to the street scene.

***Table 2** Proportion of Retail Sectors 2013-2018*

Centre	Convenience		Comparison		Service		Vacant		Miscellaneous		Total
	No	%	No	%	No	%	No	%	No	%	
Truro	28	5.6	205	41.0	201	40.2	60	12.0	6	1.2	500
Penzance	29	8.1	156	43.3	123	34.2	51	14.2	1	0.3	360
Falmouth	28	8.0	135	38.6	161	46.0	25	7.1	1	0.3	350
St Ives	32	10.8	147	49.8	92	31.2	22	7.5	2	0.7	295
Newquay	32	11.3	94	33.2	127	44.9	28	9.9	2	0.7	283
St Austell	15	7.0	66	31.0	87	40.8	42	19.7	3	1.4	213
Camborne	18	8.6	74	35.2	76	36.2	41	19.5	1	0.5	210
Redruth	14	7.4	55	29.1	83	43.9	34	18.0	3	1.6	189
Bude	17	9.8	75	43.1	70	40.2	10	5.7	2	1.1	174
Wadebridge	19	11.5	76	46.1	61	37.0	9	5.5	0	0.0	165
Liskeard	11	6.8	60	37.0	71	43.8	19	11.7	1	0.6	162
Launceston	11	6.4	58	33.7	78	45.3	22	12.8	3	1.7	172
Helston	9	5.6	49	30.2	83	51.2	20	12.3	1	0.6	162
Bodmin	15	9.6	56	35.7	64	40.8	21	13.4	1	0.6	157
Saltash	12	10.5	42	36.8	52	45.6	8	7.0	0	0.0	114
Hayle	10	9.5	38	36.2	49	46.7	7	6.7	1	1.0	105
Cornwall Average 2018	300	**8.3**	1386	**38.4**	1478	**40.9**	419	**11.6**	28	**0.8**	3611
Cornwall Average 2017	299	8.2	1431	39.4	1484	40.8	390	10.7	32	0.9	3636
Cornwall Average 2016	296	8.5	1441	38.8	1472	41.3	381	10.4	35	1	3626
Cornwall Average 2015	288	8.2	1512	40.1	1478	40.5	374	10.2	34	0.9	3686
Cornwall Average 2014	296	8.0	1521	41.2	1480	40.1	358	9.7	36	1	3691
Cornwall Average 2013	298	8.1	1530	41.7	1463	39.8	346	9.4	36	1	3673

Cornwall Retail Sector compared to the National Average

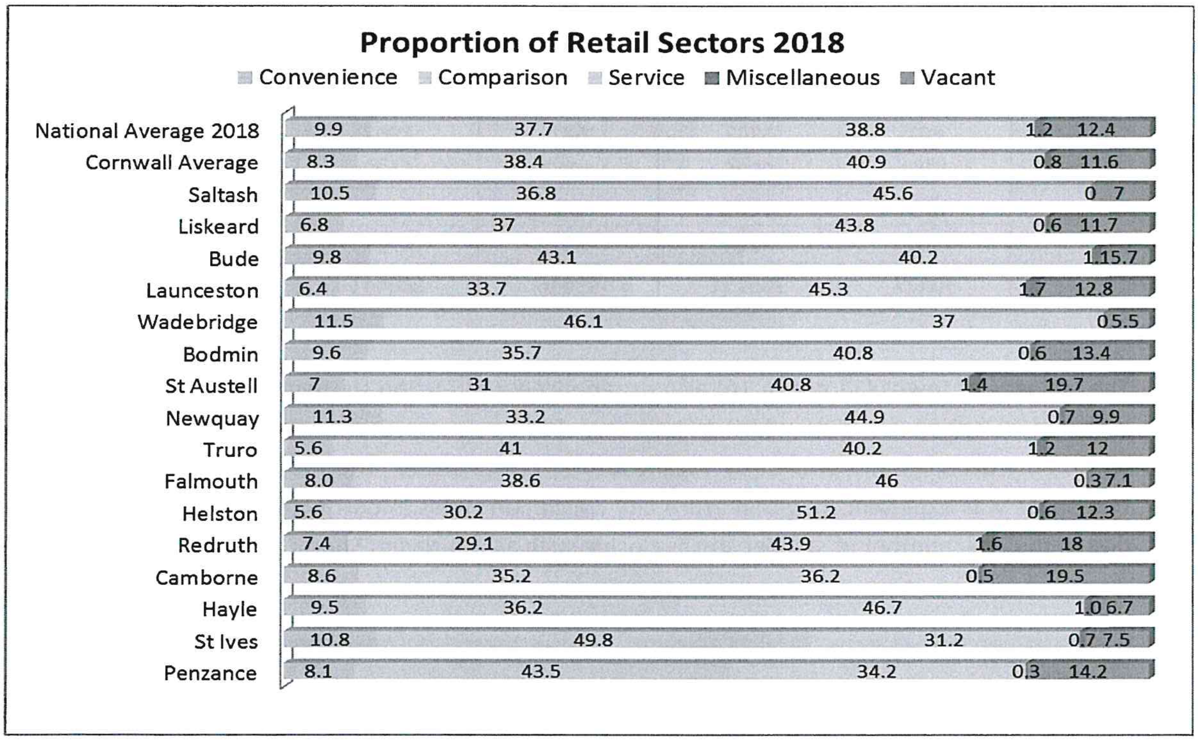
The proportion of retail sectors recorded in this year's survey is also shown below along with the national average figures (source; Experian GOAD). The retail sector average figures for Cornwall are much in line with the average data collated nationally. The convenience sector within Cornwall remains slightly below the national average but the county is performing marginally better in terms of its comparison and service sectors. Cornwall has retained a lower than average vacancy rate over the past 8 years when comparing it to the national average data although the margin between them is narrowing year on year. This is discussed in further detail within the relevant section of this report.

Table 3 Cornwall and National Average Retail Sectors 2018

2018	Convenience	Comparison	Service	Vacant	Miscellaneous
National Average	9.9	37.7	38.8	12.4	1.2
Cornwall Average	8.3	38.4	40.9	11.6	0.8

The proportion of retail sectors collated for 2018 shown in Table 2 are also shown in form of the chart below along with the national figures.

***Chart 1** % Proportion of Retail Sectors 2018*



Net change to A1 retail floorspace since last year within the TCAs

Retail floorspace within the towns are represented by convenience and comparison sectors. This section compares the net gain or net loss of floorspace compared to last year's survey. Table 4 below indicates that there was a loss of 981 sqm (net) to the convenience sector within Cornwall and a loss of 2,710 sqm (net) to the comparison sector. Notably, the greatest loss of convenience floorspace was from St Austell town centre which correlates with the relocation of its Lidl store to an out of centre location. The loss of 883 sqm of convenience use was subsequently gained within the comparison sector due to £stretcher opening in its place.

Table 4 Changes to the Convenience and Comparison Floorspace Data (sqm net) Since Last Year

Centre	2017		2018		Loss/Gain -/+	
	Convenience	Comparison	Convenience	Comparison	Convenience	Comparison
Truro	5753	57672	5635	55474	-119	-2198
Penzance	3332	19246	3223	18460	-110	-786
Falmouth	5814	18634	5571	18908	-243	274
St Ives	1516	7114	1465	7048	-51	-66
Newquay	8914	11717	9085	11099	171	-619
St Austell	4153	18329	3166	18762	-986	433
Camborne	2607	7884	2822	7438	215	-445
Redruth	4324	5317	4399	5424	75	108
Bude	3647	7739	3689	7722	42	-17
Wadebridge	3994	7708	4051	7426	57	-282
Liskeard	1726	5856	1614	5614	-112	-242
Launceston	725	3818	706	4045	-19	227
Helston	601	5143	631	4867	30	-276
Bodmin	1283	6506	1267	6208	-16	-298
Saltash	1446	3261	1531	3151	85	-111
Hayle	592	3208	592	4797	0	1589
Total	**50427**	**189151**	**49446**	**186441**	**-981**	**-2710**

The majority of towns (11 out of 16) also experienced a reduction to their comparison goods floorspace with the exception of Hayle which gained over 1500 sqm net due to the addition of Home Bargains which now occupies the previously vacant former Co-op store. The most notable loss of comparison floorspace was experienced within Truro city which correlates in part with the closure of B&M but also due to the high number of smaller stores closing such as Whirlwind Sports and Frixon.

(ii) The changes in proportion of A1 retail uses within the Primary Shopping Areas (PSA)

Another method of monitoring the health and viability of the centres is to record the percentage of units in A1 retail use within the designated Prime Shopping Area and the Town Centre Area. The proportions are calculated in relation to all town centre uses including non-retail uses. The data collected over the last four years supports the conclusions drawn earlier that A1 retail is decreasing and that this year, half of the towns had a below average proportion of A1 shops within their Prime Shopping Areas. The results in Table 5 below are sorted by size in order to easily identify the towns which are thriving and those with a declining A1 retail function. The towns with the lowest proportions tend to be those with a high proportion of service uses (the majority classified within the A2-A5 uses) and/or those towns with a high vacancy rate. There are some A1 uses which fall within the service category such as hair and beauty salons, travel agents and funeral parlours and are therefore included. This year's results show a 20% difference between the top performing town which was St Ives with the town with the lowest proportion; being St Austell.

Table 5 % Proportion of ground floor A1 retail uses within town centres

Town Centres	Prime Shopping Area	Town Centre Area
St Austell	45	39
Helston	46	41
Bodmin	47	45
Redruth	48	41
Liskeard	48	42
Newquay	49	46
Camborne	52	48
Hayle	52	55
Launceston	53	48
Falmouth	55	52
Truro	56	48
Penzance	57	55
Wadebridge	58	58
Saltash	60	59
Bude	63	59
St Ives	65	61
AVERAGE 2018	**53.4**	**49.8**
AVERAGE 2017	53.5	50.5
AVERAGE 2016	53.5	50.6
AVERAGE 2015	54.2	50.7

4.3	**Amount of retail & community facilities lost in smaller settlements** (Last Updated: December 2018)

Original Indicator and notes:

4.3	Viability and vitality of retail town centres	Amount of retail and community facilities lost in smaller settlements	No net loss of existing services and facilities in smaller settlements

Headlines:

- **3 Post Offices, 5 Convenience and 8 comparison stores have closed**
- **1 Bank, 4 chapels and 2 pubs have closed**
- **1447.6 sq m has been delivered within the food and drink sector (A3-A5 uses)**
- **Net increase of 2,800 sq m total floorspace delivered in smaller settlements**

Source:

The purpose of this indicator is to monitor the amount of retail and community facilities lost outside the 16 main towns and outside of their associated urban boundaries. A retail or community facility is only monitored here if there has been a change of use and is therefore excluded if the unit remains vacant. The table below itemises the losses completed within the year. The table shows 37 premises were lost to other uses, 28 of these being permanently lost through residential conversions; falling within C3 use.

Use Class	Use	No of Units	Floorspace	Retail Sector	No. Units (C3)
A1	Post Office	3	-110	Miscellaneous	3
A1	Shop	5	-357.1	Convenience	5
A1	Shop	8	-487.6	Comparison	5
A1	Shop	3	-172.6	Service	2
A2	Bank	1	-80.71	Service	1
A2	Office	1	-61	Service	1
A3	Café/Restaurant	4	-746	Service	3
A4	Pub	2	-567.8	Service	2
A5	Take/Away	1	-50	Service	1
D1	POW/Clinics	6	-1538.2	n/a	4
D2	Hall/ Gym	3	-941.1	n/a	1
		37	**-5112.11**	**n/a**	**28**

The monitoring also includes new provision completed within the smaller settlements and the table below records the number of new premises as being 42, with the majority of these being café /restaurants. The floorspace gained was however through extensions to existing café/ restaurants or through newly created small café areas associated with other existing establishments like within campsites, gyms and garden centres. Significant gains were recorded within the D2 leisure and recreation use which also was made up of extensions to existing facilities or through new shelters/ club huts to existing sports grounds. The largest newly created facility was a gym at Parkengue within a former industrial unit with a floorspace area of 1089 sqm.

Units created within the convenience/comparison sector made up a combined floorspace of 2054 sqm and were again delivered through the change of use or through the extension of existing premises. The largest shop with 366 sqm floorspace area was created through the redevelopment of the former sports hall at the disused airbase in St Eval, required by the adjacent Kernow Confectionary business.

To conclude, there was a loss to the number of A1 retail premises within smaller settlements but a gain to the overall floorspace through the enlargement of existing shops or through the change of use of existing buildings.

Use Class	Use	No of Units	Floorspace	Retail Sector
A1	Post Office	0	0	Miscellaneous
A1	Shop	6	1192.2	Convenience
A1	Shop	7	862.44	Comparison
A1	Shop	2	163	Service
A2	Bank	0	0	Service
A2	Office	2	153	Service
A3	Café/Restaurant	11	1248.8	Service
A4	Pub	1	48.3	Service
A5	Take/Away	2	150.5	Service
D1	Nursery/vet/museum	3	807.3	n/a
D2	Hall/ Gym	8	3286.5	n/a
		42	**7912.04**	

4.4	**Vacancy rates in main town centres** (Last Updated: December 2018)

Original Indicator and notes:

4.4	Viability and vitality of retail town centres	Vacancy rates in main town centres	Cornwall average below the national average.

Headlines:

- **The Cornwall average vacancy rate of 11.6% is below the national average (12.4%) for 2018**
- **The Cornwall average vacancy rate has remained below the national average for the past 8 years**
- **6 out of the 16 towns have a vacancy rate higher than the national average**
- **9 out of the 16 towns have a vacancy rate above the Cornwall average**

Source:

Table 5 below shows the vacancy percentages from 2012-2017 for the towns and for both the Cornwall and national averages, using retail sector data.

Table 5: *% Vacancy Rates 2012-2018 (Retail Sector data)- Experian GOAD National Averages (2012-18)*

	2012	**2013**	**2014**	**2015**	**2016**	**2017**	**2018**
Bodmin	10.4	7.7	10.8	9.5	12.6	11.3	13.4
Bude	7	7.7	7.6	5.6	4	7.4	5.7
Camborne	13.6	14.2	14.2	13.8	15.7	18.3	19.5
Falmouth	8.8	5.7	4.3	4.9	5.5	7.4	7.1
Hayle	7.5	1.9	0.9	5.6	3.8	6.6	6.7
Helston	7.7	11.1	12.6	14.1	9.2	8.5	12.3
Launceston	11.9	10	12.1	13	12.6	15.5	12.8
Liskeard	10.9	11.4	10.3	11	11.2	9.1	11.7
Newquay	5.5	5.6	6.7	7.6	7.4	8.5	9.9
Penzance	10.5	12	12.1	14.9	13.7	13.9	14.2
Redruth	17.7	18.7	19.9	23.5	20.4	18.8	18
Saltash	7.9	10.3	1.7	3.4	7	6.1	7
St Austell	12.1	14.5	15.7	15.3	19.4	18.4	19.7
St Ives	4.5	5.1	6.4	5.5	5.7	5.7	7.5
Truro	7.5	9.3	10.1	8.7	10.9	7.6	12
Wadebridge	4	5.9	7.1	6.5	7.6	7.7	5.5
Cornwall Average	**9.1**	**9.4**	**9.7**	**10.2**	**10.4**	**10.7**	**11.6**
National Average	13.2	11.5	13.7	12.7	12.1	12.1	12.4

The Cornwall average vacancy rate has consistently been lower than reported nationally but as the graph below shows the margin between them has narrowed to 0.8% this year.

Graph 1 Proportion of Vacant Units in Cornwall compared to the national Average 2010-18

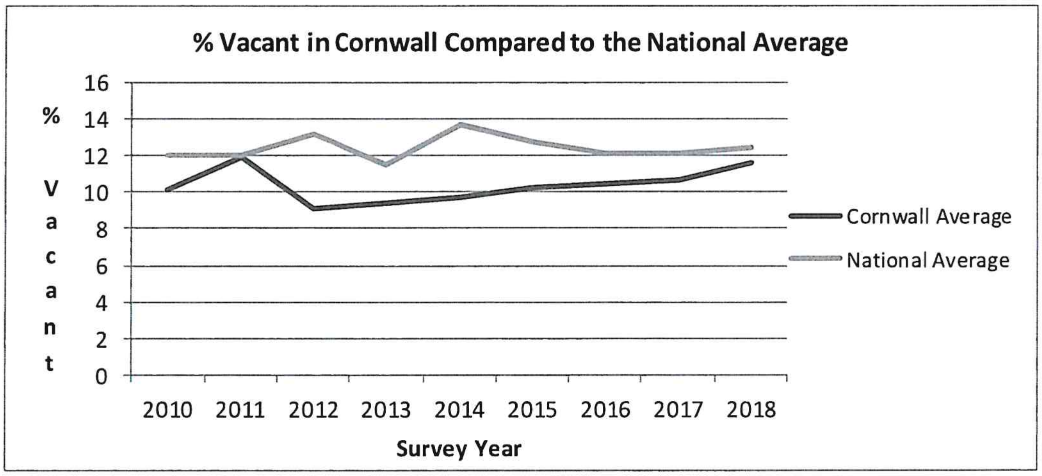


Table 6 Cornwall and National Average Vacancy Rates % (20120-18)

	2010	2011	2012	2013	2014	2015	2016	2017	2018
Cornwall Avg.	10.1	11.9	9.1	9.4	9.7	10.2	10.4	10.7	11.6
National Avg.	12.0	12.1	13.2	11.5	13.7	12.7	12.1	12.1	12.4

Bodmin now joins the towns which were reported last year as having a higher vacancy rate than the national average. These are St Austell, Redruth, Camborne, Liskeard and Penzance. Helston is now discounted from this list; just falling below 12.4%.

This year, Truro, Helston and Liskeard experienced large increases to their vacancy rates so join the previously listed towns in having a vacancy rate higher than the average in Cornwall.

Camborne, St Austell, Bodmin, Liskeard, Newquay, St Ives and Truro all experienced their highest vacancy rate over the time frame indicating 2018 as a tough year for some of Cornwall's centres. Contrary to this trend Redruth, Launceston, Falmouth, Saltash and Wadebridge all experienced a reduction to their vacancy rates.

General:

To conclude, the retail surveys measuring the viability and vitality of the 16 main towns shows that 2018 has been a mixed year depending on the town surveyed. But in terms of the average data collated for Cornwall the general trends (albeit small) indicate that the centres are decreasing in size, the comparison sector is in decline, vacancy rates are on the increase and the number of A1 retail shops within the centres is also on the decline. The top performing towns were Wadebridge, St Ives, Bude and Falmouth whilst the towns which continue to struggle are Camborne, Redruth and St Austell.

The composition of town centres is changing in response to consumer behaviour and market forces. Retailers are blaming competition from out-of-town supermarkets and retail parks, online shopping, parking charges and high business rates for the British high street decline. It has been reported that Cornwall has one of the highest online shopping rates with up to 40% being conducted online. The intention is to continue to monitor the high street and to document how the centres evolve.