

## **TORBAY LOCAL PLAN**

A landscape for success

The Plan for Torbay – 2012 to 2032 and beyond

## **SUBMISSION PLAN**

# **TORBAY RETAIL MONITOR 2014 - SUMMARY**

Torbay Council - July 2014

## TORBAY'S RETAIL HIERARCHY

Torbay has a highly dispersed pattern of shopping provision based on a hierarchy of shopping centres comprising town centres, district centres and local centres. These are described below. The Submission Local Plan proposes an additional category of 'neighbourhood centre' (see P13).

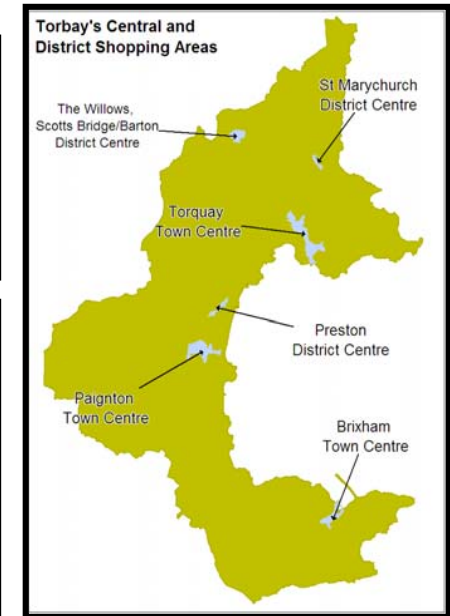
### Town Centres (Total=3)

Torquay, Paignton and Brixham town centre each offer a range of key town centre shops and services. Although a significant number of high-street multiples are located in the three town centres, the market for major stores providing comparison goods is generally constrained by the Bay's close proximity to the regional centres of Plymouth and Exeter, especially as both of these have modern shopping developments. An important feature of each Central Area is its retail clusters (areas with a distinctive function), in particular the concentrations of Class A2 (financial and professional services) and A3, A4 and A5 (cafes, bars and takeaways) business units.

### District Centres (Total=3)

**Torquay = St Marychurch and The Willows Paignton = Preston**

The role of district centres is to provide shops and services that complement rather than undermine those provided by town centres. These tend to include a mix of specialist shops, and convenience shops and services to meet the needs of surrounding areas. St Marychurch and Preston District Centres, in Torquay and Paignton respectively, are long-established district centres of a traditional nature and provide a range of community facilities which in turn have less reliance on the car-borne shopper. The Willows in Torquay was purpose built in the early 1990s to provide a retail focus for the new community being developed at Scott's Bridge, Barton. It has a more limited range of facilities, although individually the units are very large and draw shoppers from a wider area.



### Local Centres (Total=29)

**Torquay = Moor Lane, Watcombe  
Barton Hill Road, Barton  
Fore Street, Barton  
Hele Road, Hele  
Cadewell Lane, Shiphay  
Hawkins Avenue, Shiphay  
Queensway, Shiphay  
Plainmoor  
Broadpark Road, Livermead**

**Babbacombe  
Sherwell Valley Road, Chelston  
Old Mill Road, Chelston  
Walnut Road, Chelston  
Lucius Street/Belgrave Road  
Higher Union Street, Torre  
Ellacombe  
Wellswood  
Scotts Bridge/Barton**

**Paignton = Preston Down Road  
Marldon Road  
Foxhole  
Three Beaches, Goodrington  
Kingsway Avenue  
Cherrybrook Square  
Churston Broadway**

**Brixham = Pillar Avenue  
Summercourt Way  
St Mary's Square  
Briseham Road**

Local centres meet the shopping needs of local communities, generally serving only their immediate catchment: The monitoring and assessment of the range and balance of local centre services and facilities enables us to assess where current deficiencies exist in the provision of local convenience shopping and other facilities which serve those day-to-day needs.

**TORBAY RETAIL MONITOR JULY 2014**

**SUMMARY TABLE- TOWN CENTRES**

	A1	A2	A3	A4	A5	A1/A3	B1	B2	B8	C1	C3	D1	D2	SG	VAC	SEASONAL CLOSURES	TOTAL
Torquay Central Area	218 46.19 %	39 8.26% 56	11.86 %	24 5.08% 16	3.39%	7 1.48 %	8 1.69%	0 0.00 %	0 0.00 %	1 0.21 %	4 0.85%	4 0.85%	3 0.64%	15 3.18%	77 16.31 %	0%	472
Paignton Central Area	215 48.31 %	37 8.31% 34	7.64%	10 2.25% 13	2.92%	1 0.22 %	5 1.12%	0 0.00 %	0 0.00 %	0 0.00 %	28 6.29%	9 2.02%	1 0.22%	28 6.29%	64 14.38 %	0%	445
Brixham Central Area	122 50.41 %	7.02%	29 11.98 %	8 3.31% 13	2.48%	6 0.83 %	3 1.24%	2 0.83 %	0 0.00 %	0 0.00 %	15 6.20%	7 2.89%	0 0.00%	9 3.72%	22 9.09%	0%	242
<b>TOTALS</b>	<b>555</b>	<b>93</b>	<b>119</b>	<b>42</b>	<b>35</b>	<b>10</b>	<b>16</b>	<b>2</b>	<b>0</b>	<b>1</b>	<b>47</b>	<b>20</b>	<b>4</b>	<b>52</b>	<b>163</b>	<b>0</b>	<b>1159</b>

**SUMMARY TABLE- DISTRICT CENTRES**

	A1	A2	A3	A4	A5	A1/A3	B1	B2	B8	C1	C3	D1	D2	SG	VAC	SEASONAL CLOSURES	TOTAL
The Willows District Centre	7 87.50 %	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00 %	0 0.00%	0 0.00 %	0 0.00 %	0 0.00 %	0 0.00%	1 12.50 %	0 0.00%	0 0.00%	0 0.00%	N/A	8
St Marychurch District Centre	53 55.79 %	14.74 %	7 7.37%	3 3.16%	0 0.00%	0 0.00 %	0 0.00%	0 0.00 %	0 0.00 %	0 0.00 %	3 3.16%	5 5.26%	0 0.00%	2 2.11%	8 8.42%	N/A	95
Preston District Centre	66 41.77 %	7.59%	5 3.16%	1 0.63% 12	5.06%	8 0.63 %	10 6.33%	4 2.53 %	1 0.63 %	0 0.00 %	16 10.13 %	5 3.16%	1 0.63%	11 6.96%	17 10.76 %	N/A	158
<b>TOTALS</b>	<b>126</b>	<b>26</b>	<b>12</b>	<b>4</b>	<b>8</b>	<b>1</b>	<b>10</b>	<b>4</b>	<b>1</b>	<b>0</b>	<b>19</b>	<b>11</b>	<b>1</b>	<b>13</b>	<b>25</b>		<b>261</b>

**SUMMARY TABLE- LOCAL CENTRES**

Torbay Retail Monitor 2014 - Summary

	A1	A2	A3	A4	A5	A1/A3	B1	B2	B8	C1	C3	D1	D2	SG	VAC	SEASONAL CLOSURES	TOTAL
Moor Lane, Watcombe	3 75.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	1 25.00%	0 0.00%	0 0%	4
Barton Hill Road, Barton	6 54.55%	1 9.09%	0 0.00%	1 9.09%	2 18.18%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	1 9.09%	0 0.00%	0 0.00%	11
Fore Street, Barton	3 42.86%	0 0.00%	0 0.00%	0 0.00%	3 42.86%	0 0.00%	1 14.29%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	7
Hele Road, Hele	5 45.45%	0 0.00%	0 0.00%	0 0.00%	1 9.09%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	4 36.36%	0 0.00%	0 0.00%	0 0.00%	1 9.09%	0 0%	11
Cadewell Lane, Torquay	5 35.71%	2 14.29%	1 7.14%	0 0.00%	1 7.14%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	3 21.43%	1 7.14%	0 0.00%	1 7.14%	0 0.00%	0 0.00%	14
Hawkins Avenue, Shiphay	2 28.57%	0 0.00%	0 0.00%	0 0.00%	1 14.29%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	4 57.14%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	7
Queensway, Shiphay	2 28.57%	2 28.57%	0 0.00%	0 0.00%	1 14.29%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	2 28.57%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	7
Plainmoor	18 36.73%	2 4.08%	2 4.08%	3 6.12%	7 14.29%	0 0.00%	2 4.08%	0 0.00%	0 0.00%	0 0.00%	9 18.37%	1 2.04%	0 0.00%	3 6.12%	2 4.08%	0 0.00%	49
Babbacombe	33 37.08%	5 5.62%	11 12.36%	2 2.25%	4 4.49%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	24 26.97%	4 4.49%	0 0.00%	3 3.37%	3 3.37%	0 0.00%	89
Sherwell Valley Road, Chelston	5 55.56%	0 0.00%	0 0.00%	1 11.11%	1 11.11%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	1 11.11%	0 0.00%	1 11.11%	0 0.00%	0 0%	9
Old Mill Road, Chelston	14 58.33%	1 4.17%	1 4.17%	0 0.00%	4 16.67%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	1 4.17%	2 8.33%	1 4.17%	0 0%	24
Walnut Road,	13	5	0	0	1	0	4	0	0	0	17	3	0	2	2	0	47

Torbay Retail Monitor 2014 - Summary

Chelston	27.66 %	10.64 %	0.00%	0.00%	2.13%	0.00 %	8.51%	0.00 %	0.00 %	0.00 %	36.17 %	6.38%	0.00%	4.26%	4.26%	0.00 %	
Lucius Street/ Belgrave Road	26 40.63 %	4 6.25%	3 4.69%	2 3.13%	5 7.81%	0 0.00 %	1 1.56%	0 0.00 %	0 0.00 %	0 0.00 %	12 18.75 %	1 1.56%	0 0.00%	4 6.25%	6 9.38%	0 0.00 %	64
Higher Union Street, Torre	24 24.00 %	9 9.00%	6 6.00%	2 2.00%	3 3.00%	0 0.00 %	8 8.00%	0 0.00 %	0 0.00 %	0 0.00 %	25 25.00 %	1 1.00%	2 2.00%	4 4.00%	16 16.00 %	0 0.00 %	100
<b>TOTALS</b>	<b>159</b>	<b>31</b>	<b>24</b>	<b>11</b>	<b>34</b>	<b>0</b>	<b>16</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>100</b>	<b>12</b>	<b>3</b>	<b>22</b>	<b>31</b>	<b>0</b>	<b>443</b>

SUMMARY TABLE- LOCAL CENTRES CONTINUED

	A1	A2	A3	A4	A5	A1/A3	B1	B2	B8	C1	C3	D1	D2	SG	VAC	SEASONAL CLOSURES	TOTAL
Ellacombe	4 26.67 %	0 0.00%	0 0.00%	0 0.00%	1 6.67%	0 0.00 %	0 0.00%	0 0.00 %	0 0.00 %	0 0.00 %	8 53.33 %	0 0.00%	0 0.00%	2 13.33 %	0 0.00%	0 0%	15
Wellswood	16 57.14 %	1 3.57%	4 14.29 %	1 3.57%	0 0.00%	0 0.00 %	1 3.57%	0 0.00 %	0 0.00 %	0 0.00 %	2 7.14%	0 0.00%	0 0.00%	2 7.14%	1 3.57%	0 0.00 %	28
Broadpark Road, Livermead	4 50.00 %	0 0.00%	1 12.50 %	0 0.00%	0 0.00%	0 0.00 %	1 12.50 %	0 0.00 %	0 0.00 %	0 0.00 %	0 0.00%	1 12.50 %	0 0.00%	0 0.00%	1 12.50 %	0 0.00 %	8
Scotts Bridge/Barton	2 40.00 %	0 0.00%	0 0.00%	0 0.00%	2 40.00 %	0 0.00 %	0 0.00%	0 0.00 %	0 0.00 %	0 0.00 %	0 0.00%	1 20.00 %	0 0.00%	0 0.00%	0 0.00%	0 0%	5
Preston Down Road	4 66.67 %	0 0.00%	0 0.00%	0 0.00%	1 16.67 %	0 0.00 %	0 0.00%	0 0.00 %	0 0.00 %	0 0.00 %	0 0.00%	0 0.00%	0 0.00%	1 16.67 %	0 0.00%	0 0.00 %	6
Marldon Road	4 57.14 %	0 0.00%	0 0.00%	0 0.00%	1 14.29 %	0 0.00 %	1 14.29 %	0 0.00 %	0 0.00 %	0 0.00 %	0 0.00%	1 14.29 %	0 0.00%	0 0.00%	0 0.00%	0 0.00 %	7
Foxhole	5 55.56	0 0.00%	0 0.00%	0 0.00%	1 11.11	0 0.00	0 0.00%	0 0.00	0 0.00	0 0.00	0 0.00%	0 0.00%	1 11.11	1 11.11	1 11.11	0 0.00	9

Torbay Retail Monitor 2014 - Summary

	%				%	%		%	%	%		%	%	%	%		
Three Beaches, Goodrington	8 44.44 %	2 11.11 %	1 5.56%	1 5.56%	4 22.22 %	0 0.00 %	0 0.00%	0 0.00 %	0 0.00 %	0 0.00 %	0 0.00 %	0 0.00 %	0 0.00 %	2 11.11 %	0 0.00 %	0 0.00 %	18
Kingsway Avenue	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00 %	0 0.00%	0 0.00 %	0 0.00 %	0 0.00 %	3 50.00 %	0 0.00%	0 0.00%	1 16.67 %	2 33.33 %	0 0.00 %	6
Cherrybrook Square	5 83.33 %	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00 %	0 0.00%	0 0.00 %	0 0.00 %	0 0.00 %	0 0.00 %	1 16.67 %	0 0.00%	0 0.00%	0 0.00%	0 0.00 %	6
Churston Broadway	5 50.00 %	2 20.00 %	2 20.00 %	0 0.00%	1 10.00 %	0 0.00 %	0 0.00%	0 0.00 %	0 0.00 %	0 0.00 %	0 0.00 %	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00 %	10
Pillar Avenue	5 83.33 %	0 0.00%	0 0.00%	1 16.67 %	0 0.00%	0 0.00 %	0 0.00%	0 0.00 %	0 0.00 %	0 0.00 %	0 0.00 %	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00 %	6
Summercourt Way	1 33.33 %	0 0.00%	0 0.00%	0 0.00%	1 33.33 %	0 0.00 %	0 0.00%	0 0.00 %	0 0.00 %	0 0.00 %	0 0.00 %	0 0.00%	0 0.00%	1 33.33 %	0 0.00%	0 0.00 %	3
St. Mary's Square	2 10.53 %	0 0.00%	2 10.53 %	2 10.53 %	1 5.26%	0 0.00 %	0 0.00%	0 0.00 %	0 0.00 %	0 0.00 %	12 63.16 %	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00 %	19
Briseham Road	2 66.67 %	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00 %	1 33.33 %	0 0.00 %	0 0.00 %	0 0.00 %	0 0.00 %	0 0.00%	0 0.00%	0 0.00%	0 0.00%	0 0.00 %	3
<b>TOTALS</b>	<b>65</b>	<b>5</b>	<b>10</b>	<b>5</b>	<b>13</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>25</b>	<b>4</b>	<b>1</b>	<b>10</b>	<b>5</b>	<b>0</b>	<b>149</b>

<b>GRAND TOTALS</b>	<b>905</b>	<b>155</b>	<b>165</b>	<b>62</b>	<b>90</b>	<b>11</b>	<b>45</b>	<b>6</b>	<b>1</b>	<b>1</b>	<b>191</b>	<b>47</b>	<b>9</b>	<b>97</b>	<b>224</b>	<b>0</b>	<b>2012</b>
	44.99 %	7.70%	8.20%	3.09%	4.48%	0.55 %	2.24%	0.30 %	0.05 %	0.05 %	9.49%	2.34%	0.45%	4.82%	11.13 %	0.00 %	99.88 %

## **TOWN CENTRES**

### **TORQUAY**

Torquay Central Area extends from Union Street down to the harbour and up Torwood Street. Union Street and Fleet Street house the majority of the high street multiples in this area, with Tor Hill Road, Market Street, Abbey Road and The Terrace hosting a number of smaller specialist shops.

The general trend for Torquay for the four years to 2013 indicated a decline in the number of A1 units and a continued increase in vacant units. For 2014 the number of vacant units has fallen slightly by 2% and the number of A1 units has slightly increased from 211 to 219.

Union Street and Fleet Street are the main shopping streets leading down from the town hall to the harbour. Union Street has 13 vacant units this year (compared to 17 last year) and Fleet Street has the same number as last year (a total of 9). A significant number of the vacancies in these parts of the town are as a result of the demise of national chains. The two shopping centres, Union Square and Fleet Walk, are performing better than in past years with Union Square now having only 6 vacancies and Fleet Walk just 5. These have traditionally been locations suited to 'pop-up' Christmas shops, and it is therefore hoped that later on in the year more of the vacant units in these locations will be occupied. The more peripheral streets have continued to experience some long-term and small pockets of vacant units.

Retail units around Torquay Harbour are closely linked to the tourist industry, with areas such as Vaughan and Victoria Parades in particular experiencing seasonal closures. The balance of retail in this area is split largely between A3, A4, A5 (cafes/ restaurants, public houses and hot food takeaways) and A1 retail uses (gift shops and tourist related goods) although there are also Sui Generis (SG) uses (such as amusement arcades and nightclubs) in this area. Torwood Street, and in particular the area around the former Royal Garage site (allocated in the Local Plan with permission for mixed use development P/2011/0035) has an increasing number of vacant units, the majority of which have been vacant for at least a couple of years.

### **PAIGNTON**

Uses within Paignton Central Area have remained very similar over the past few years; the number of A1 units is at 215 compared to 214 in 2013. The number of vacant units has fallen from 69 back to the 2012 figure of 64. Vacancies remain concentrated in Winner Street and Church Street.

The main retail area is Victoria Street, a Primary Frontage which has the majority of high street multiples and enjoys the benefits of pedestrianisation and high levels of occupation compared to the rest of the town centre, although there are currently 5 vacant units as there were in 2013.

To the north of Victoria Street are Hyde Road, the Crossways Centre and Torquay Road. Hyde Road is characterised by a number of A2 or B1 uses (including a building society, estate agents and solicitors) and so tends to offer a relatively modest level of pedestrian activity. There is also much traffic along this busy road which dissects the town centre and is a main route to Goodrington and further on to Brixham, detracting from the shopping environment here.

The Crossways Centre has suffered from a rising number of long term vacancies since 2005 when there were 5 units vacant to a peak of 18 in 2012. This year has seen the number of vacant units come down to 8. New occupiers are all local independent retailers. Land to the south of Crossways (Local Plan Policy S2 -TM6) has been allocated for mixed use development which would aim to incorporate a combination of retail, leisure, employment and residential use. The Local Plan recognises its opportunities for retail development, particularly in conjunction with redevelopment, refurbishment or extension of Crossways, however, this site is privately owned and therefore any improvements on this site are dependent on the owner's participation and ambitions.

There remain two further distinctive areas, Winner Street/Church Street and Torbay Road. Winner Street comprises a number of small specialist shops. The strongest retail area in Winner Street is to the south of the junction with Palace Avenue. Overall, however, the street has endured a number of long term vacancies. There was a constant 16 vacancies in Winner Street each year from 2009 to 2013, the figure then jumped last year to 23 but has fallen back this year to 17 and there are a good number of units being filled with new enterprises. However, the high vacancy levels have broken the secondary frontage which would otherwise carry shoppers through to Church Street. This may partially explain the high levels of vacancy in Church Street. The number of vacant units here remains at 8 units (the same as last year's figure). This is quite a high proportion when it is recognised that Church Street has only 22 units and that 5 of those are residential. Many of the units on Church Street, particularly the vacant units, are in a poor state of repair. This does not encourage people to invest or shop in the area.

Torbay Road's connection to the seafront explains the tourist-based nature of its retail units. It is characterised to the western end by a number of A1 uses whereas to the eastern end near the seafront the use changes to A3, A4 and A5 (cafés/ bars/ takeaways) and Sui Generis (in particular amusement arcades). Due to its seasonal nature it experiences a rapid turnover of units, with only 6 vacant units this year (1 more than in 2013). It should be noted that two of these units are vacant as a result of a fire and were occupied at the time. Another one of the units is also being refurbished ready for occupation. One of the vacant units has been so for 11 consecutive monitor periods (although this is the large ex-cinema not a smaller retail unit).

## BRIXHAM

The character of Brixham is rooted in its function as a fishing port which has contributed to its role in the tourist industry. Therefore a number of retail units particularly around The Strand and The Quay are related to tourism. The Quay is characterised by a number of A3 and A4 units (cafes/ bars) and A1 units (gift shops).

Behind the Strand there is a pocket of industrial units in Paradise Place and Furze Lane, although Pump Street which is adjacent has seen investment over the past few years as changes of use to residential take place. Whilst this area is not on a Primary or Secondary Shopping Frontage, it continues to be monitored in connection with the future potential relationship to the mixed use development allocated in the Local Plan on the land adjacent (Central Brixham Car Park).

50 per cent (122) of Brixham's 242 units are in A1 use. This figure has remained steady since 2007 following a fall in the number of A1 units from 141 in July 2001. Fore Street, a Primary Shopping Frontage, forms the main retail focus for Brixham. The pedestrianised street provides a safe and accessible shopping environment. The street comprises a mix of A1, A2, A3, A4 and A5 uses along with two units in D1 use and has enjoyed long term stability.

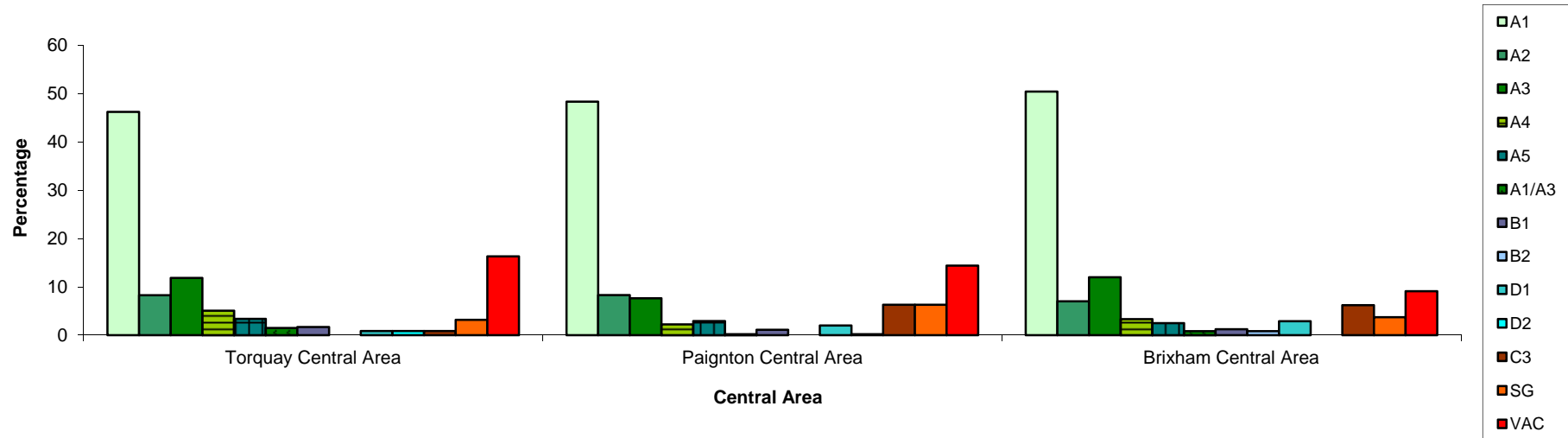
Brixham has bucked the trend of the other two towns in Torbay, and remains the town centre with the lowest proportion of vacancies (9%) in Torbay.





Compared to the other town centres in Torbay, Brixham has the highest proportion of A3 (restaurants and cafes) and D1 (non-residential institutions) uses. Brixham is also the only town centre with any units being used for a B2 use. These are workshops related to the marine industry, located in Paradise Place. Conversely, Brixham is the only town centre without any units classed as D2, inferring that the needs of the local community are not being met through leisure facilities such as cinemas.

Percentage of Shops and Services in Torbay's Central Areas July 2014

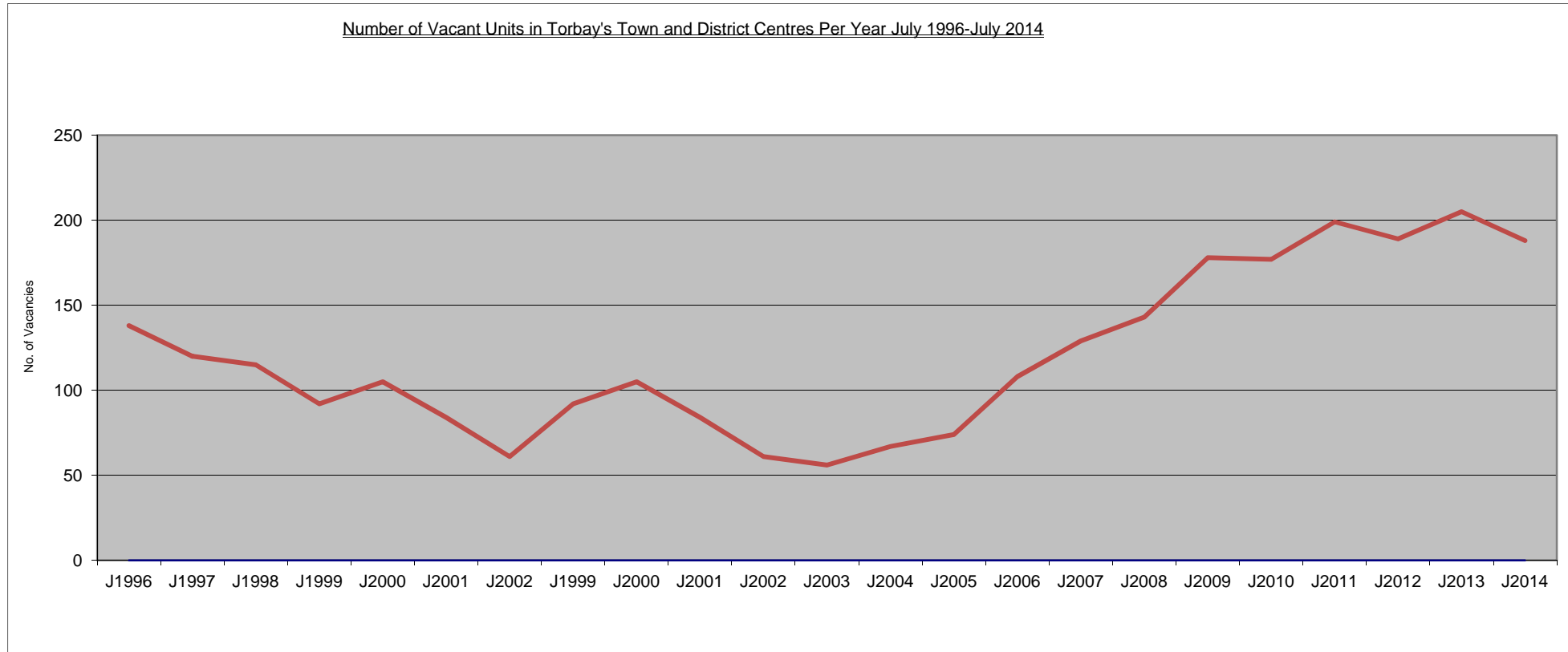


**Distribution of Use Classes:**

As can be seen from the graph above, the three town centres follow a similar pattern of uses for their units. Torquay has the lowest proportion of C3 (residential) units in the Bay. This could be because of its size, as residential units do not need to encroach on the units within the town centre boundary. Vacancies are of similar proportions in Torquay and Paignton. Brixham has a vacancy proportion which is half that of Torquay. The general pattern of use this year is similar to that of last year.

**Vacancies:**

Vacancy levels in Torbay in general have been increasing since 2003/2004 (see graph below). However, this year has seen a fall in the number compared to last year. Careful monitoring of these vacancy levels needs to take place. There are a number of vacant units on the 'main' shopping street in Torquay (Union Street opposite the Tesco store) and these are beginning to generate a noticeable gap in the retail frontage. It should be noted that Torbay is not alone in its rising trend of vacant units in town centres. This is a national problem, which the government is keen to reverse, with the Portas Review (published December 2011) recommending a number of actions to improve the vitality and viability of town centres. The government has also more recently (May 2013) changed some permitted development rights in relation to town centre use classes. Most notably, premises in a B1(a) office use can change to C3 residential subject to prior approval, and A1, A2, A3, A4, A5, B1, D1 and D2 uses will be permitted to change use for a single period of up to two years to A1, A2, A3 and B1 uses. More information can be found at [www.planningportal.gov.uk/permission/commonprojects/changeofuse/](http://www.planningportal.gov.uk/permission/commonprojects/changeofuse/)

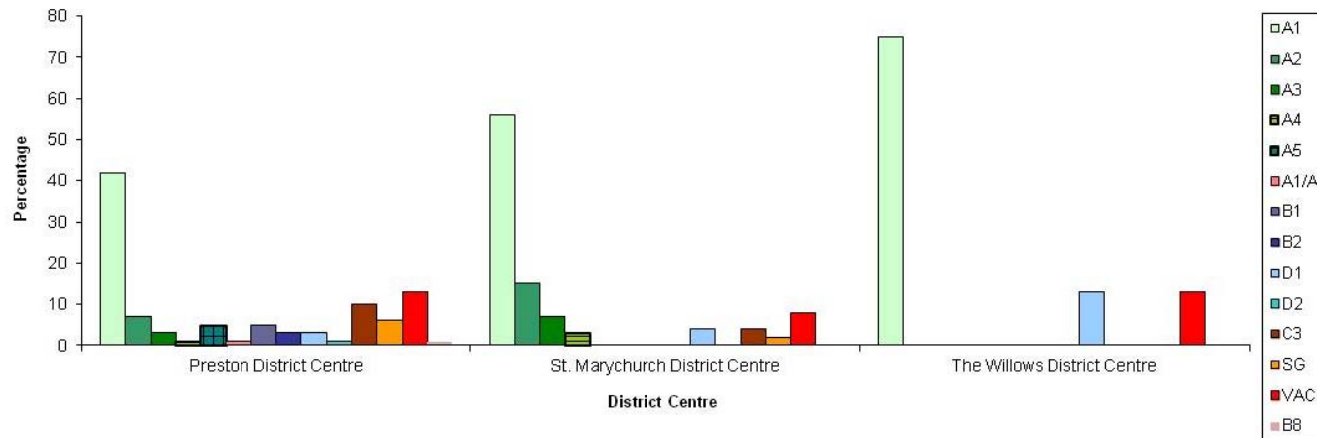


**DISTRICT CENTRES**

Both Preston and St Marychurch District Centres have a good range of local shops and other commercial uses and a relatively low vacancy rate. Preston is located on the main coastal road between Torquay and Paignton and so encourages the type of shops that appeal in particular to passing trade whereas St Marychurch includes a number of more specialised shops, including those serving the tourist trade. The Willows District Centre is a successful purpose built centre comprising a range of large stores with extensive car parking.

TORQUAY

Percentage of Shops and Services in Torbay's District Centres July 2013



The Willows District Centre was built as a focus for the housing development at Scott's Bridge and units are separated into two clusters, one parallel to Nightingale Close (Wren Park) and a second, lower development off Nicholson Road. It is the district centre with the highest proportion of units with an A1 use, because of its development as an out-of-town shopping centre which would attract a high number of visitors from a wide area around Torbay. There is one unit of D1 use which is currently used as a nursery. The nursery provides an essential facility, in an ideal location for people both resident at the Willows and those who drive past on their way to work. The former Comet unit, which was vacant for last year's monitor, is now occupied by DFS.

The 95 units at St Marychurch District Centre offer an attractive shopping environment which stems largely from the centre's pedestrianisation and associated landscaping and street furniture. As a district centre, St Marychurch is based around the provision of goods and services for the local community and lacks the more obvious and direct tourism influences noted elsewhere in The Bay. Within St. Marychurch there remain small, independent shops, banks, a post office, newsagent and chemist to ensure that local day-to-day needs are catered for. However, there are also some more specialist shops selling carpets, gifts or specialist foods.

The former GA building on the edge of the district centre at St Marychurch has been redeveloped to provide 7 retail units and 4 residential units. The units have taken some time to fill and there remain 3 vacant units within this new precinct. The remainder of the units include 3 in A1 use (with one being a charity shop) and 1 in A3 use as a coffee shop. Now that more units are being filled it is likely that vitality at this edge of centre location will improve.

## PAIGNTON

Preston District Centre is Paignton's only district centre and lies on the outskirts of Paignton and forms a linear configuration stretching along Torquay Road. This main commuter link between Paignton and Torquay means that Preston benefits from good accessibility by both public and private sector transport and enjoys visual prominence. However, the high volume of traffic combined with the small number of designated crossing points for pedestrians, have a detrimental impact on the retail environment.

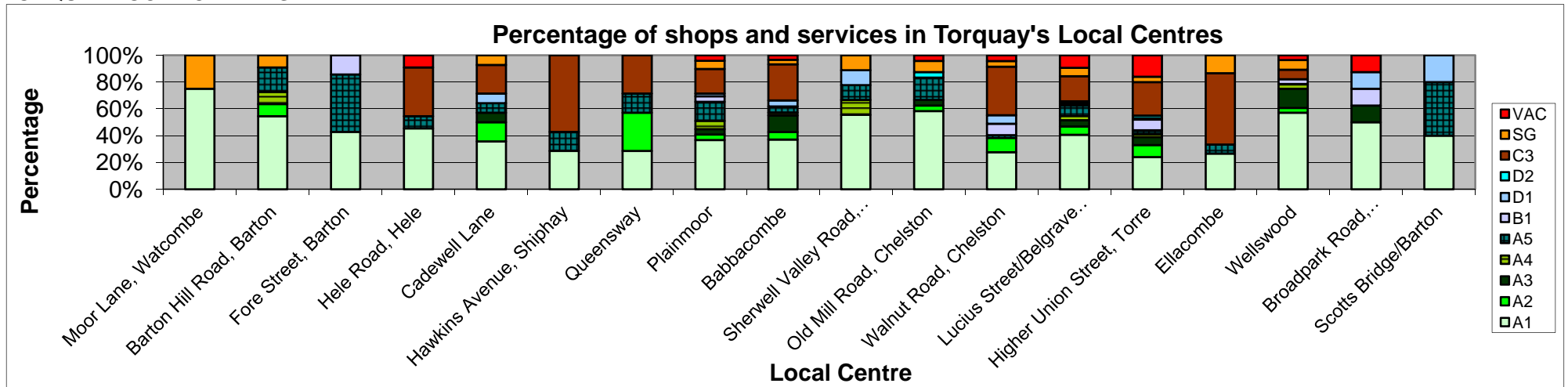
The number of A1 units has remained steady at 66 units this year. At 42% of units within the district centre, Preston has the smallest proportion of A1 units out of all the town and district centres across Torbay. The number of residential units has remained the same as last year, the majority of which are well dispersed apart from one cluster of units to the southern end of Torbay Road. These are situated next to Preston Gardens and opposite a residential road, therefore not impacting too much on the visual prominence of the retailing aspect of this district centre. This figure represents 10% of all units, the highest residential proportion of the town and district centres. The proportion of sui generis units in Preston is also the highest of the town and district centres, remaining the same as last year.

There are 158 retail units in Preston which cover a broad range of use classes. This reflects Preston's function as a district centre, designed to provide a range of goods and services. In terms of vacancies, recent trends do not give cause for concern, there has been a fall in the number of vacant units from 20 last year to 17 this year, and only a couple of these are long term vacancies.



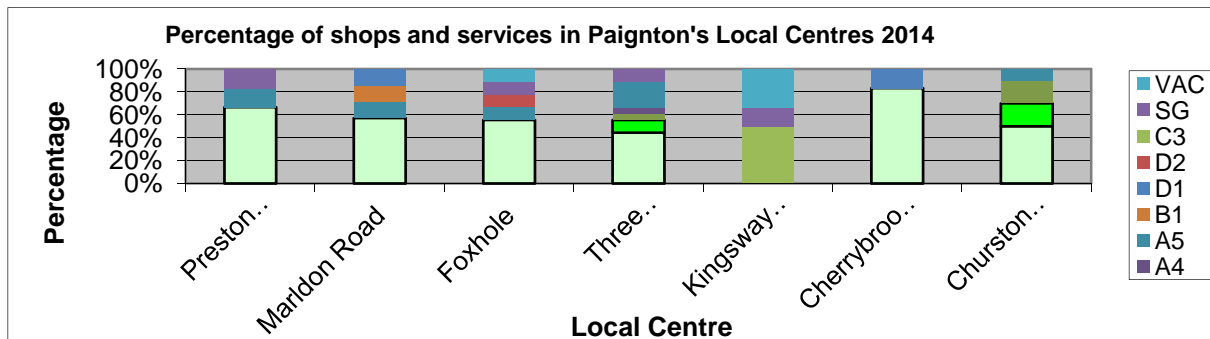
## LOCAL CENTRES

### TORQUAY LOCAL CENTRES



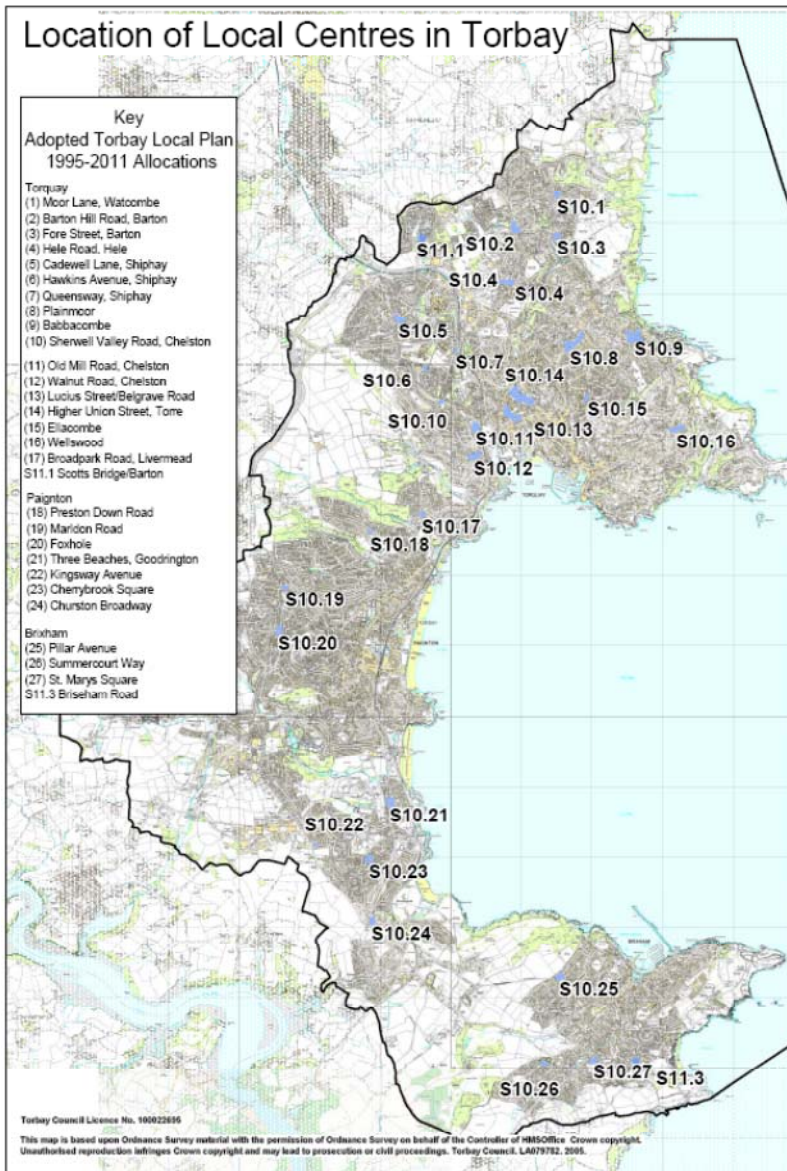
Local centres provide important facilities for local neighbourhoods. There is little turnover in units in the majority of local centres in Torquay. No centres have more than 20% of their units vacant, with only half of the 18 centres having any vacancies at all. Local centres are generally well located throughout Torbay, although the Proposed Submission Plan – ‘A landscape for success: The Plan for Torbay – 2012 to 2032 and beyond’ proposes a new local centre in Torquay at Lisburne Square, Torwood, along with the loss of the local centres at Hawkins Avenue and at Kingsway Avenue. Some existing local centres (generally the smaller existing ones) are also proposed to be designated as a new category of centre, namely **neighbourhood centres**. Typically, these are small parades with limited provision of facilities and serving a more local catchment. Upton Road is proposed as a new neighbourhood centre (ie. the only neighbourhood centre which is not an existing local centre).

### PAIGNTON LOCAL CENTRES



Paignton's local centres in general perform well, although Kingsway Avenue has failed and now includes predominantly residential and vacant uses.

The Proposed Submission Local Plan ‘A landscape for success: The Plan for Torbay – 2012 to 2032 and beyond’ (February 2014) currently proposes the removal of Kingsway Avenue as a local centre.

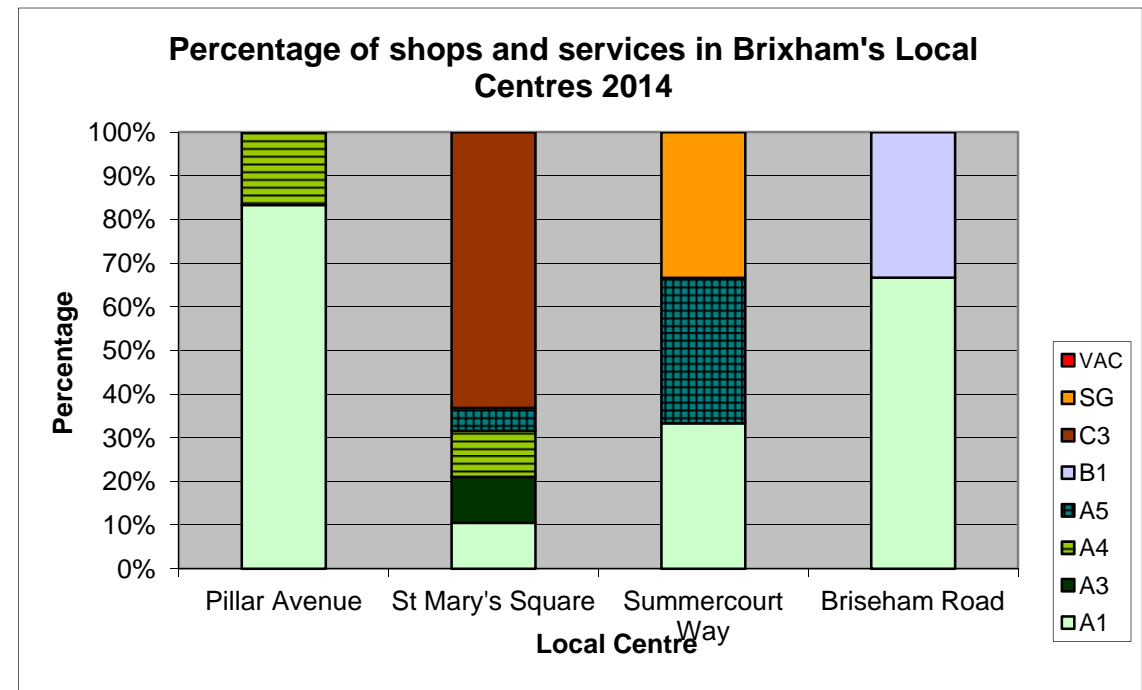


### BRIXHAM LOCAL CENTRES

The local centres in Brixham have a varying number of units with an array of different use classes, making each local centre very individual.

St Mary's Square has the widest range of uses, but is dominated by residential use (at 65% as can be seen from the graph below). This high proportion is in danger of severely undermining the vitality and viability of this local centre. The high number of residential units leaves this, Brixham's largest local centre, with limited facilities, and the area, whilst well maintained, may struggle to attract and retain customers, although there is a SPAR shop and a church just outside the local centre boundary which are popular.

St Mary's Square is the only local centre in Brixham proposed to remain as a local centre in the Proposed Submission Local Plan, with the other three proposed to be designated as neighbourhood centres.



## **SUMMARY OF ISSUES ARISING FROM ANALYSIS OF LOCAL CENTRES**

Whilst many local centres in Torbay provide an important function in terms of local services there remain several issues which arise from the monitoring of such centres:

- High vacancy levels (in some)
- Poor environmental quality
- Conditions for shoppers, including safety and accessibility issues.

Last year there were vacancies in 12 out of the 29 local centres in Torbay. This year there are vacancies recorded in 11 local centres. Higher Union Street in Torre, Torquay has the highest level of vacancies at 16% of all units.

There has not been a significant decline in the range of services within local centres over the past year, in fact there appears to be a small resurgence through the retention of A1 uses and a low vacancy rate. Whilst the majority of local centres are served by some form of newsagents/convenience store or supermarket (the only ones without are Scotts Bridge/Barton, Kingsway Avenue and St Mary's Square - although a Spar is adjacent to the local centre boundary), these are typically not small 'corner shop' style shops but are instead multiple retailers. However, bakeries and independent grocers do seem to be surviving in more prosperous local centres such as Wellswood where the local centre succeeds in being attractive and appealing for tourists and residents alike.

The most physically neglected sites appear to be the smallest of the local centres such as Hele and Queensway (Torquay), Foxhole and Kingsway Avenue (Paignton). These have extensive grassy or concrete expanses in front of the retail units, which are not well kept, tend to be rather bleak, and can be littered. Centres such as Queensway and Foxhole in particular may benefit from more landscaping to make the centre more attractive to shoppers and to encourage vitality in the area.

Most local centres do offer car parking but this is typically limited to the customers of the large supermarkets which provide the car parking space (such as Farmfoods in Hele, Waitrose in Plainmoor and The Co-Op in Cherrybrook Square). Some on-street parking is available in most local centres but there is little parking available at Ellacombe (Torquay) or in St. Mary's Square (Brixham). This may discourage people from visiting local centres that do not have these facilities. However, most local centres do appear to be well served by public transport links with buses making regular stops within the local centre itself.

Some local centres would benefit from improving street safety for shoppers by introducing more traffic calming measures or pedestrianisation schemes (particularly Hele and Plainmoor). Such schemes have been successful on Higher Union Street and Briseham Road, Brixham (as part of the Sharkham housing estate). Additionally, keeping fragmented or dead frontages to a minimum within local centres will contribute to an atmosphere of safety and vitality and may encourage residents to use their local centres more frequently.

## **REVIEW OF TRENDS**

The challenge to the Council is to help to maintain and sustain viable and vibrant shopping areas offering a range of services. However, there is a polarisation of retail investment in the major centres. Torbay's proximity to Exeter and Plymouth influences the number of high-street multiples (chain stores) that choose to locate in the three towns, which in turn affects the position of each in the national retail hierarchy.

The most notable trend of recent survey periods has been the fall in the number of vacancies and charity shops compared to the previous years. The survey revealed a good number of units being refurbished and new retailers entering the market. There are signs of a potential resurgence in some areas, albeit that the edges of the more linear centres are struggling. There remains legitimacy to the policy direction of shrinking the district and town centres where this is occurring.

There has been a rapid turnover of units retailing discounted clothing and household goods in the last few years, where the closure of a number of discount businesses after only brief periods of operation has been offset by the opening of similar businesses in the same, or other vacant units. These are particularly prevalent in Torbay because of the seaside/tourist resort atmosphere and the type of shop that small units near the harbour/seaside attract.

Most local centres have seen very little change since they were first monitored in 2005. Established centres appear to have held their ground this year. The effective loss of Hawkins Avenue and Kingsway Avenue local centres is likely to be confirmed through their removal in the Proposed Submission Local Plan.

There are a number of ingredients that go into making a successful local centre and increasingly the market is demanding visual prominence on main streets and the inclusion of larger anchor stores. The recent consent at Yannons Farm has seen the local centre move to an edge of ring road location and includes an Aldi store of some 1535 sqm (Gross Internal Area) alongside some unit shops and a medical surgery. Similarly White Rock includes a ring road based centre with a 1652 sqm (Gross Internal Area) convenience store. The need to provide a mix of local and passing trade along with the changes in retail logistics and shopping habits is likely to see a limited demand for small unit shops within new developments and an increasing demand for larger centres that provide for a wider catchment whilst serving a local community. Design and accessibility are likely to be key considerations in order to make such centres work as community hubs for local people as well as retail centres for passersby.

In summary, the past year has seen a slight resurgence in the retail sector across Torbay. The previous trend of increasing vacancies has reversed and there are now fewer vacancies this year than last. Whilst there are still some gaps appearing which are of concern (e.g. opposite Tesco in Fleet Street), a good number of Torbay's centres are looking far more healthy than they did a year or two ago. A number of shops with new occupiers / uses were noted and a several were also being refurbished. If this trend were to continue into next year then vacancies should fall again in 2015. The policy approach being promoted in the emerging new Local Plan (removing failing local centres, reducing the extent of some of our shopping frontage etc) appears to be having a positive impact on vitality and viability and should go even further to arrest the problem of vacancies and declining vitality. Fleet Walk has also seen a big turnaround with vacancies being filled by A1 retailers. The Sports Direct move into the rotunda will add further to this improvement.

## **THE FUTURE OF RETAILING IN TORBAY**

Pockets of long-term vacancies and/or residential uses within designated town/district/local centres highlight the issues which need to be considered in future policy formulation in relation to boundary and shopping frontage designations, as has been the case in compiling the emerging new local plan. Opportunity areas can be identified from those that are not achieving their full potential, as well as the re-enforcement of the need for urgent regeneration in particular areas. A knowledge of facilities available within centres and local community needs could potentially highlight gap areas for provision within Torbay, and as the government has given greater powers to local communities and neighbourhoods, local trends and data gathered by the Strategic Planning Team could be used as evidence when prioritising local need.

As previously mentioned, slight changes to the retail hierarchy (including new neighbourhood centres), loss of former local centres and amendments to centre boundaries and primary and secondary shopping frontages are proposed in 'A Landscape for Success: The Plan for Torbay to 2032 and beyond'. These changes are as a result of guidance in the National Planning Policy Framework (NPPF), the Torbay Retail Study (and subsequent updates) and consultation with neighbourhood forums.



### **Business Improvement Districts (BIDs)**

Following public consultation in November/December 2007, the Council agreed to proceed with the creation of a Business Improvement District for Torquay and Paignton. The BID is a defined geographical area where business/non domestic ratepayers have voted to invest collectively in local improvements. The aim is to create a more attractive, vibrant and welcoming experience for shoppers in Torbay's town centres. BIDs increase the resources available for enhancing and promoting town centres, and give businesses a stake in the management and allocation of these resources. In this context, the Torbay Town Centres Company was established in 2008, in order to co-ordinate and manage the town centres within the Torbay area and to facilitate the development of BIDs. Torquay and Paignton both now have BIDs in place, although Brixham traders rejected their proposed BID in November 2011. A BID for Babbacombe Bay, comprising Babbacombe, St Marychurch and Plainmoor was accepted towards the end of 2012.

### **Localism and Neighbourhood Planning**

The Localism Bill received Royal Assent in November 2011. It provides councils and neighbourhoods with greater powers, giving local communities more control over housing and planning decisions. In this context, three Neighbourhood Plan Forums have been set up in Torbay, one for each of the towns, with the intention of producing a Neighbourhood Development Plan for each area. These will include aspirations for town centres in particular and could also include proposals for district and local centres.

### **The Torbay Retail Study (2006) and Updates (2008, 2011 and 2013)**

The Torbay Retail Study was prepared by GVA Grimley in order to provide an evidence base for the emerging Local Development Framework. Each of the three main town centres and the three district centres (The Willows, St Marychurch and Preston) in Torbay were studied and analysed in terms of their current position in the retail hierarchy, and any problems which are hindering potential shopping development opportunities. The retail composition, trading performance, role and function of the centres were studied, along with a survey of traders in each centre, and the existing allocations identified in the Adopted Torbay Local Plan were examined. The study revealed that the average shopper spends £34 per visit to Torquay town centre, £17 in Paignton and £18 in Brixham, reiterating the comparative popularity of Torquay town centre. Key issues arising from the study were:

- The need for additional retail floorspace in Torbay over the period 2005-2016
- In Torquay, need for better links between the harbour and main shopping area
- The need for improvement of the Victoria Centre and Crossways Centre in Paignton
- In Brixham, the most keenly sought improvements were for additional food and non-food retail provision (namely a new supermarket).

GVA Grimley then carried out an update on the Torbay Retail Study to extend its findings over the period to 2026. This included conducting an updated household patterns survey, partly in order to determine the impact which new shopping developments nearby (namely the Asda store in Newton Abbot and Drake Circus in Plymouth) may have on Torbay's retail function. This Retail Update was published in November 2008. A second update was published in September 2011 in response to a number of factors, including the need to obtain up to date information relating to local retail issues and the need to respond to guidance contained in PPS4: Planning for Sustainable Economic Growth (now superseded by the NPPF). However, a further review of retail expenditure levels in Torbay was undertaken by GVA Grimley in summer/autumn 2013 and published at the end of the year (Torbay Retail Study Update, December 2013). This forms a key part of the development plan evidence base.

### **National Planning Policy Framework (NPPF)**

The NPPF promotes delivering sustainable development through encouraging the use of policies to support the vitality and viability of town centres and reinstates a sequential test for locating retail development in town centres. Retail impact assessments can also be required, especially on developments of more than 2,500 sq m.

## SIGNIFICANT PLANNING APPLICATIONS RECEIVED FOR RETAIL DEVELOPMENT

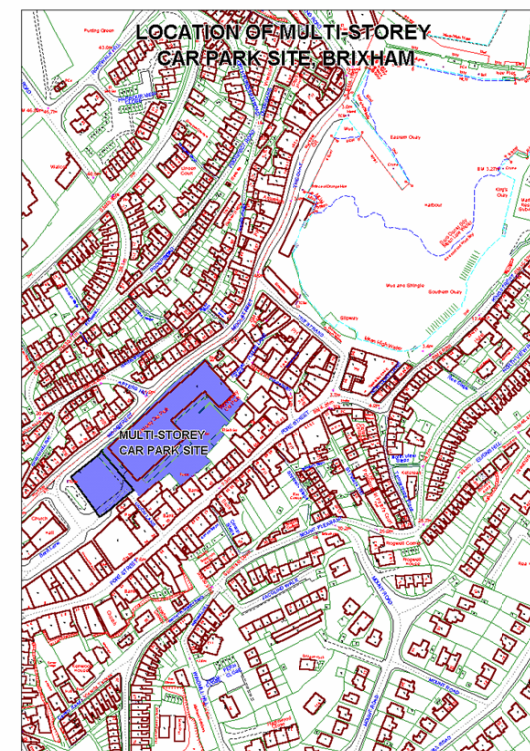
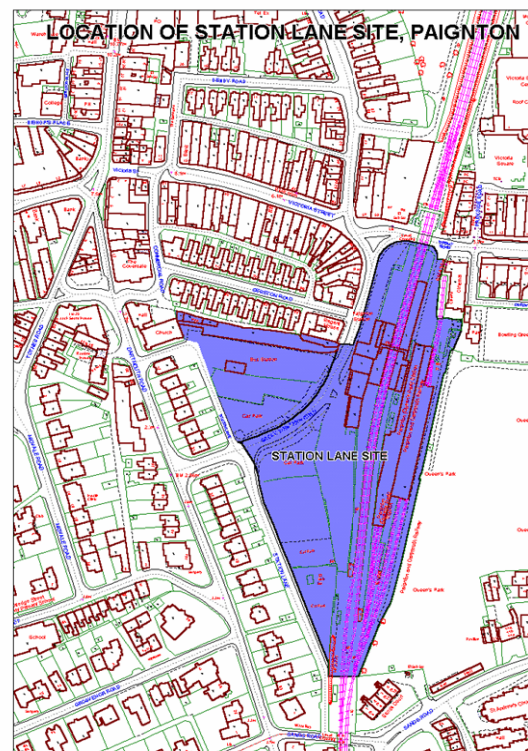
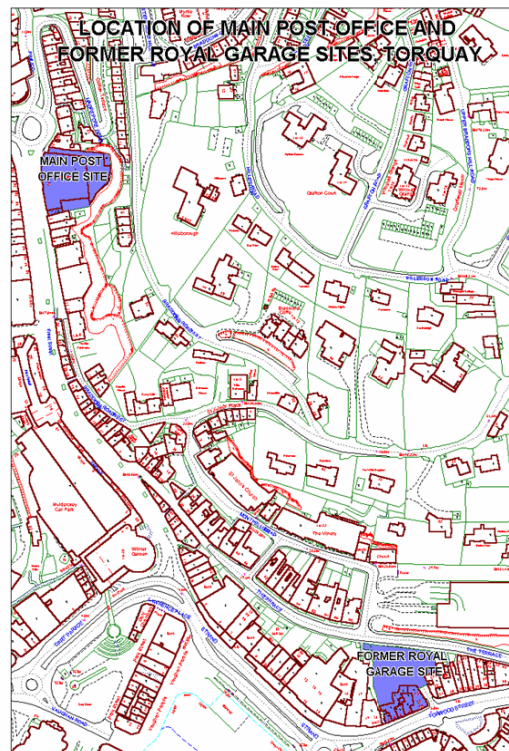
Application No.	Address	Proposal	Decision
P/2012/1123/MPA	250 Babbacombe Road Torquay Devon TQ1 3TA	Alterations to the building associated with its conversion to a supermarket and extension to the internal mezzanine floor by 282 sqm for ancillary plant and offices [non sales area]; together with new hard and soft landscaping, car park layout and site access arrangements (following demolition of greenhouse extensions, 297 sqm).	Appeal Dismissed
P/2012/1145/PA	36A Walnut Road Torquay Devon TQ2 6HS	Change of use from B1 (offices) to A2 (Estate Agents)	Permitted
P/2012/1233/PA.	44A Tor Hill Road Torquay Devon TQ2 5RF	Change of use to tattoo, body piercing, nail and beauty salon with a retail counter - retrospective	Permitted
P/2012/1309/MPA	Middle Street Car Park And Town Square Land Bordered By Bank Lane, Brewery Lane, Middle Street And Paradise Place. Brixham	Provision of a 4 storey building containing a Class A1 supermarket [net sales 2791m2], 8 A1 and A2 retail units [ GIA 218m2] including a shopmobility unit on the ground floor level, 340 car parking spaces on levels 1-3, 14 residential dwellings facing Middle Street, associated public realm improvements, highway alterations and access provision. Remediation of land and all necessary infrastructure provision.	Approved
P/2013/0079/PA	Torbay Travel 6 Tudor Building Fore Street St Marychurch Torquay	Change of use from an A1 travel agents to A2 estate agents.	Permitted
P/2013/0632/PA	19 Lucius Street Torquay Devon TQ2 5UW	Change of use from A1 to a mix of A3 and A5 with ancillary delivery service.	Permitted
P/2013/0677/MPA.	Land At Edginswell Business Park Of Orchard Way Torquay TQ2 7FA	Formation of an (A1) Tesco store (inc. customer cafe) and approximately 977 sqm. B1 office development on plots Vesta and Edesia at Edginswell Business Park associated infrastructure, retaining structures, access, parking and landscaping and outline planning application for the development of a B1 office building of 2090 sqm. on the Sarritor plot , A3/A% unit with associated access and parking	Refused, subject to Appeal
P/2013/0690/PA.	4 Old Mill Road Torquay Devon TQ2 6AU	Change of Use from A1 to A3/5	Approved
P/2013/0340	115 Dartmouth Road, Paignton	Change of use from A1 to A2	Approved
P/2013/0702/PA	45 Bolton Street Brixham	Proposed change of use of ground floor shop and maisonette to form 3 no. self-contained flats	Approved
P/2013/0830/PA	Eastleys, 3 New Road Brixham	Change of use from office accommodation to single dwelling	Approved
P/2013/1201	55 Torbay Road, Paignton	Change of use - retail shop to cafe / takeaway (A1 to A3 and A5)	Approved
P/2013/1282	Land At Brixham Road Yannons Farm Paignton	Erection of retail building (Use Class A1), with associated access, parking, service yard and plant; health centre (Use Class D1), with 2 no. complimentary healthcare units (Use Class D1/A1/A2) and associated access and parking; mixed use building comprising 6 no. 2-bed flats and 2 no. commercial units (Use Class B1/A1/A2/A3/D1), with associated access and parking; 4 no. 2-bed dwellings and 4 no. 3-bed dwellings, with associated access and parking; associated roads, parking, play area, amenity space, landscaping and substation to form a Local Centre (reserved matters relating to P/2010/0289/MOA).	Approved
P/2014/0282	The Pavilion, Vaughan Parade, Torquay	Change of use and restoration of Pavilion to form hotel reception and spa including restaurant, bars and function rooms. Construction of four storey 60 bed hotel, and five to seven storey block of 45 residential apartments with ground floor restaurant and retail uses adjacent to harbour. Construction of new harbour walkway, provision of 73 car parking spaces on Cary Green .Construction of Marina Office and berth facilities and associated landscaping.	Pending Consideration
P/2014/0599	Dorothy Perkins, 26 Fore Street, Brixham	Sub divide existing ground floor retail unit into two units, form new retail unit with shop front in basement fronting onto Union Lane. Units A & C are to have a Class A1 use with unit B having a Class A1 -& A3 use	Pending Consideration
P/2014/0562	25 Hyde Road, Paignton	Change of use of rear of dry cleaners (use class A1) to dwelling (use class C3)	Pending Consideration

## DEVELOPMENT PLAN

### Adopted Torbay Local Plan 1995-2011

The Torbay Local Plan (1995-2011) was adopted in April 2004. It provides the land use planning framework for development in Torbay and sets out policies relating to its retail centres in the context of the Retail Strategy (Policy SS). Over-arching themes of the Adopted Plan include the encouragement of town centre mixed use (S2), the use of the sequential approach (S6) and the development of district and local centres (S9 and S10) as well as more specific policies on, for example, corner shops, amusement centres, hot food takeaways and sale of goods from petrol filling stations. The boundaries of Town Centres are also defined for Torquay, Paignton and Brixham. The policies incorporate several proposals (see below)

- Policy S5 'New Town Centre Shopping Developments' aims to reinforce the link between Union Street and Fleet Street and to reduce the polarisation of these two shopping areas in Torquay by promoting the Main Post Office site on Fleet Street (below left). The site of the former Royal Garage on Torwood Street offers potential to contribute to retailing in the harbour area. Both sites are capable of incorporating a convenience and/or comparison goods scheme. Both sites offer scope for mixed-use development but proposals will differ in accordance with the character of the immediate area. The main Post Office site has subsequently been developed and converted to a Tesco Metro store with residential apartments above and the former Royal Garage site has received permission for a mixed-use redevelopment to include a retail unit and restaurant.



- Paignton's Station Lane site (TM7), on the edge of the Central Area (below centre), offers scope for a mixed-use development incorporating social housing, leisure and retail units in conjunction with an overarching scheme to regenerate the bus and train station facilities. The proposal also recognises the locational potential of this site for office use. A community library and customer/community services hub on part of the site opened in September 2010.
- In Brixham it is important to ensure that the retail development proposal for the multi-storey car park site is implemented in a manner which will enhance the retailing provision of the Central Area for the local community. The proposed mixed-use scheme in this location is intended to contribute to the regeneration of this area in much the same way as Station Lane in Paignton. It is considered important to secure a major section of the site for a new convenience goods store, to present an attractive frontage to a new town square and to strengthen pedestrian links between Middle Street and Fore Street, Pump Street and the Strand. An application has recently been approved for a mixed use development anchored by a Tesco supermarket in this location. However, it is understood that Tesco has withdrawn its interest in the site and a new operator or potentially a new scheme may be required for this location.

### **New Local Plan**

The new Local Plan for Torbay 'A Landscape for Success: The Plan for Torbay – 2012 to 2032 and beyond' was submitted to the Planning Inspectorate at the end of July 2014. The production of Neighbourhood Plans for Torquay, Paignton and Brixham, currently under preparation, is taking place in parallel with work on the new Local Plan. Alongside the strategic policy framework there are four Masterplans being formulated for areas of development and investment in the Bay. Two of these Masterplans are for Town Centre regeneration. One is for the town centre of Torquay and another is for the town centre of Paignton. These Masterplans will provide catalysts for change in these centres in order that, through mixed use development, these important centres can continue to provide the focus for commercial, retail and community life in the two towns. The policy framework within the New Local Plan includes a number of measures to revitalise existing retail centres. Reinvestment, curtailment of the extent of centres, introduction of 'meanwhile' uses and the promotion (through masterplanning) of new mixed use development will ensure our existing centres remain the focus for retail based commercial investment in Torbay. The revised retail hierarchy of Torbay is to include a new category of centre, the Neighbourhood Centre, with the recognition that some of the small Local Centres and previously unallocated shopping units provide for a much more local catchment area. The Plan also recognises the need for flexibility and focuses on the individual character of retail centres as the driver for their future development. This will mean that leisure, living and working will be balanced alongside shopping to create a viable future for Torbay's town, district, local and neighbourhood centres.

## USE CLASSES ORDER

## Summary of Use Classes

Use Class	Use/Description of Development
A1; Shops	The retail sale of goods to the public: Shops, Post Offices, Travel Agencies & Ticket Agencies, Hairdressers, Funeral Directors & Undertakers, Domestic Hire Shops, Dry Cleaners, Internet Cafes, Sandwich Bars (where sandwiches or other cold food are to be consumed off the premises)
A2; Financial & Professional Services	Financial Services: Banks, Building Societies & Bureau de Change. Professional Services (other than health or medical services): Estate Agents & Employment Agencies. Other services which it is appropriate to provide in a shopping area: Betting Shops.
A3; Restaurants & Cafes	Where the primary purpose is the sale and consumption of food and light refreshment on the premises.
A4; Drinking Establishments	Public House, Wine Bar or other Drinking establishments (where primary purpose is sale and consumption on the premises)
A5; Hot Food Take-away	Where primary purpose is sale of hot food to take-away
B1; Business	Offices, other than use within A2 Research and development of products or processes Light industry
B2; General Industrial	Carrying out of an industrial process other than one falling in class B1
B8; Storage & Distribution	Storage or distribution centre
C1; Hotels	Hotel, Boarding House or Guest House
C2; Residential Institutions	Hospital, Nursing Home or Residential School, College or Training Centre
C2A; Secure Residential Institution	Including use as a prison, young offenders institution, detention centre, custody centre etc.
C3; Dwelling Houses	Use as a dwelling house
C4; Houses in multiple occupation	Small shared houses occupied by between three and six unrelated individuals, as their only or main residence, who share basic amenities such as a kitchen or bathroom.
D1; Non-Residential Institutions	Clinics and health centres, crèches, day nurseries or day centres, museums, public libraries, places of worship etc.
D2; Assembly & Leisure	Cinema, swimming bath, gymnasium, bingo hall etc.
Sui-Generis	Theatres, nightclubs, amusement arcades, launderettes, petrol stations, car showrooms etc.

NB. The above is a general guide only.

As of 30<sup>th</sup> May 2013, additional change of use permitted development rights apply. Those affecting retail and town centres are as follows;

- Premises in B1, C1, C2, C2A and D2 Uses Classes can change use permanently to a state-funded school, subject to prior approval.
- Premises in B1(a) office use can change to C3 residential use, subject to prior approval.
- Buildings with A1, A2, A3, A4, A5, B1, D1 and D2 uses will be permitted to change use for a single period of up to two years to A1, A2, A3 and B1 uses.