

# Retail and Leisure Study

## Final Report

On behalf of **South Hams and West Devon Council**



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# 1 Introduction

- 1.1.1 South Hams District Council (SHDC) and West Devon Borough Council (WDBC) instructed Peter Brett Associates LLP (PBA) in September 2016 to prepare retail and leisure evidence to underpin their emerging Joint Local Plan (JLP). The plan area includes Plymouth City Council (PCC) and PCC already benefits from a recent piece of retail evidence in the form of the draft Plymouth Retail Study (PRS), dated June 2016 and prepared by GVA. Therefore, this evidence is prepared for SHDC and WDBC only.
- 1.1.2 This study is entitled a 'Retail and Leisure Study' (RLS) and seeks to update and amalgamate existing evidence available to the two local authorities, including draft evidence prepared for SHDC. The original instruction to PBA in 2013 by SHDC was to undertake a retail and leisure study in order to understand the current function of the main towns, along with identifying whether any additional retail floorspace is required in the plan period.
- 1.1.3 The original study's terms of reference were to provide a comprehensive assessment of the functional role of the main towns within SHDC, in terms of the retail and leisure facilities they provide for their community. More specifically the study was commissioned to help the Council understand and define the needs and character of SHDC, by assessing:
- the locally independent retail offer and the diversity of retailing and leisure provision
  - the distribution of uses and whether different areas of the 'Study Area' are characterised by distinctive retail/leisure identities
  - ways for the towns to fulfil their retail and leisure potential, including whether any additional floorspace is required
  - what new uses could contribute to town vibrancy and importantly increase footfall in the town centre.
- 1.1.4 SHDC received a draft report in August 2014 and this report remains unpublished due to the Council reconsidering its growth strategy. Prior to this, PBA also prepared a report that focused in detail on Ivybridge - the Ivybridge Retail and Leisure Study (IRLS) published in May 2013.
- 1.1.5 Furthermore, WDBC benefits from a detailed Town Centre & Retail Study (TCRS) published in July 2012 and prepared by Strategic Perspectives.
- 1.1.6 When considering the need for updated evidence to support the JLP, it is worth recapping the main requirements of the National Planning Policy Framework (NPPF), which sets out the Government's planning policies for England. In respect of ensuring the vitality of town centres, paragraph 23 states that '*planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period*'.
- 1.1.7 Paragraph 23 requires local planning authorities to, inter alia, '*define a network of centres that is resilient to anticipated future economic changes*' and '*promote*

*competitive town centres that provide consumer choice and a diverse retail offer and which reflects the individuality of town centres'.*

- 1.1.8 The sixth bullet point under paragraph 23 states that *'it is important than needs for retail, office and other main town centre uses are met in full and are not compromised by limited site availability'*. Paragraph 161 states that local planning authorities should assess *'quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development'*.
- 1.1.9 The most recent published retail and leisure evidence for the two authorities as it stands is:
- SHDC: Ivybridge Town Centre Retail and Leisure Study (IRLS), May 2013 (prepared by PBA)
  - WDBC: West Devon Borough Council, Town Centre & Retail Study (TCRS), July 2012 (prepared by Strategic Perspectives)
- 1.1.10 PBA reviewed the above documents and, in our judgement, there is a requirement to update the retail and leisure evidence for the two authorities, including finalising, and updating, the draft evidence that PBA prepared for SHDC. It is clear that some of the evidence is out of date, particularly given the rapidly evolving retail and leisure sector and the changing macro-economic circumstances. Therefore, the evidence is being updated and refreshed and the agreed terms of reference are:
- Ensuring that the evidence is NPPF/NNPG compliant, including providing updated policy and market signals context
  - Undertake updated health checks and strengths, weaknesses, opportunities and threats (SWOT) analysis for SHDC centres of Dartmouth, Kingsbridge, Totnes and Ivybridge and WDBC centres of Okehampton and Tavistock, as well as assess the role and function of six local centres in SHDC and four local centres in WDBC)
  - Assess the quantitative and qualitative need for additional retail and leisure uses across both authorities
  - Consider the development capacity of the existing town centres to accommodate the needs for retail and leisure uses (see above at iii)
  - Provide recommendations, which will include strategy recommendations for each of the main centres and key planning policy recommendations, including recommendations on boundaries, locally set impact thresholds and monitoring.
- 1.1.11 It should be emphasised that this study ought to be read alongside the two published studies where necessary; namely to IRLS and the TCRS.
- 1.1.12 Furthermore, we highlight the approach to survey data at the outset of this study. One of the key building blocks of retail and leisure evidence is surveys of current shopping and leisure activities, conventionally undertaken as telephone surveys of households. Its primary purpose is to support the quantitative analysis by assessing where residents of the two local authorities (and beyond) are undertaking their shopping and leisure activities.



- 1.1.13 It is necessary and indeed good practice to take a proportionate approach to preparing retail and leisure evidence. Therefore, in agreement with the two authorities, we have not commissioned a new household survey of shopping and leisure patterns to underpin this study. Due to this decision, it is necessary to rely upon existing evidence. The existing household surveys that cover the two local authority areas are as follows:
- **SHDC:** survey of 1,000 households across eight zones undertaken March/April 2013 focused on the SHDC area (study area attached at **Appendix A**)
  - **WDBC:** survey of 1,001 households across 10 zones undertaken in November/December 2011, focused on the WDBC area (study area attached at **Appendix B**).
- 1.1.14 We appreciate that there is also a PCC survey across 16 zones undertaken in June 2015 (assumed 2,000 surveys), focused on PCC but including five zones covering the SHDC/WDBC area. However, this survey does not address SHDC and WDBC in sufficient detail to utilise for this study.
- 1.1.15 We consider that it is not realistically feasible to combine the SHDC survey with the WDBC survey data. This is because each survey has a different base year, use different questions and most importantly use different, yet overlapping catchment areas. Therefore, the quantitative need calculations for the two local authorities have been undertaken separately, albeit using consistent data inputs (other than the survey). We explain this in more detail in the relevant sections of this report.
- 1.1.16 Finally, we have liaised with the consultants producing PCC's retail evidence in order to ensure consistency. It can be confirmed that identical sources have been used for base expenditure data, base population data, population and expenditure projections, special forms of trading projections and benchmark sales densities (both to convert surplus expenditure to floorspace needs and to measure the trading performance of existing floorspace). The only difference in the data inputs used, other than the survey (as explained above) concerns the assumptions on sales density growth (or efficiency growth) of existing floorspace, which is due to the different characteristics of the retail property offer within PCC vis-à-vis SHDC and WDBC.
- 1.1.17 The remainder of this study is structured as follows:
- **Section 2** provides an overview of national planning policy and guidance on retail and leisure needs, including a brief summary of the existing planning policy position for each authority
  - **Section 3** summarises market signals and economic trends impacting on retail which form the context for this study
  - **Section 4** assesses the role and function of centres and other retail destinations in SHDC, including a 'SWOT' analysis for each of the main centres
  - **Section 5** assesses the role and function of centres and other destinations in WDBC, including a 'SWOT' analysis for each of the main centres

- **Section 6** summarises patterns of retail spending, based on the results of a household survey conducted in March/April 2013 for SHDC and based on a survey from November/December 2011 for WDBC
  - **Section 7** assesses the quantitative need for retail uses
  - **Section 8** assesses the main qualitative need for retail uses
  - **Section 9** assesses the quantitative and qualitative need for leisure uses
  - **Section 10** provides the study's recommendations, including strategy recommendations for each centre and advice on planning policy.
- 1.1.18 A glossary of terms is provided at the end of the study, along with separate appendices.

## 2 Planning policy context

### 2.1 Introduction

2.1.1 In this Section, the position of the emerging development plan (i.e. the JLP) is explained, before consideration is given to national policy and guidance insofar as it is relevant to this study, and the recent changes to permitted development rights. This section should be read alongside **Appendix C**, which provides a summary of the adopted development plan for each authority and **Appendix D**, which provides a summary of existing retail evidence.

### 2.2 Emerging development plan

- 2.2.1 SHDC, WDBC and PCC are currently preparing a new joint local plan entitled 'The Plymouth and South West Devon Joint Local Plan'. The Plan brings together work that has previously been carried out separately by the three local authorities on the Plymouth Plan, South Hams 'Our Plan' and West Devon's 'Our Plan'.
- 2.2.2 Once adopted, the JLP will be the single strategic plan dealing with land use and development across PCC, the SHDC and WDBC. It will set out proposals that will balance the needs for housing, employment and the environment through to 2034.
- 2.2.3 Public consultation took place between 1st July and 12th August 2016. The consultation information was split into two booklets; the 'Thriving Towns and Villages' booklet, which looks at the rural towns and villages across SHDC and WDBC, and the 'At Plymouth' booklet, which looks the city of Plymouth and its surrounding areas.
- 2.2.4 Following the analysis of the initial consultation, the formal Regulation 19 consultation is due in March 2017 while submission of a finalised Joint Local Plan to government is anticipated for May 2017.

### 2.3 National policy and guidance

- 2.3.1 The NPPF, dated March 2012 sets out the government's planning policies for England. Section 2 of the NPPF relates to town centres. In respect of ensuring the vitality of town centres, paragraph 23 states that *'planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period'*.
- 2.3.2 Paragraph 23 requires local planning authorities to, inter alia, *'define a network of centres that is resilient to anticipated future economic changes' and 'promote competitive town centres that provide consumer choice and a diverse retail offer and which reflects the individuality of town centres'*.
- 2.3.3 The third bullet point in paragraph 23 requires that the extent of town centres and primary shopping areas are defined, based on a clear definition of primary and secondary frontages. It also requires policies to be set which make it clear which uses will be permitted.
- 2.3.4 The sixth bullet point under paragraph 23 states that *'it is important that needs for retail, office and other main town centre uses are met in full and are not compromised'*

*by limited site availability*'. Paragraph 161 states that local planning authorities should assess, inter alia, the following

- the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development
- the role and function of town centres and the relationship between them, including any trends in the performance of the centres
- the capacity of existing centres to accommodate new town centre development
- locations of deprivation which may benefit from planned remedial action.

2.3.5 The seventh bullet point of paragraph 23 concerns the allocation of appropriate edge of centre sites for main town centre uses, where suitable and viable town centre sites are not available. It also explains that if edge of centres sites cannot be identified, then policies should be set for meeting identified needs in other accessible locations. In a similar vein, the eight bullet point of paragraph 23 requires policies to be set to consider proposals for main town centre uses which cannot be accommodated in or adjacent to town centres.

2.3.6 Although within the development management element of the policy, paragraph 26 allows the setting of local impact thresholds (with the default set at 2,500 sqm). This matter is addressed in more detail in our recommendations.

2.3.7 Section 8 of the NPPF relates to healthy communities, which has relevance in shaping retail and town centre policies. Specifically, paragraph 70 relates to the formulation of planning policy (and decision making) to enable the delivery of '*social, recreational and cultural facilities and services*' to meet the needs of the community through:

- Positive planning for more sustainable communities through the provision of shared spaces, community facilities including local shops, public houses, cultural buildings, and other local services
- Protecting '*against the unnecessary loss of valued facilities and services, particularly where this would reduce the community's ability to meet its day-to-day needs*'
- Allowing '*established shops, facilities and services*' to sustainably modernise and be retained for the benefit of the community
- Adopting '*an integrated approach*' to the location of housing, economic uses and community facilities and services.

2.3.8 The National Planning Policy Guidance (NPPG) supports the NPPF and is available as an online resource. The section on 'Ensuring the Vitality of Town Centres' is relevant. There is a requirement for a strategic vision for town centres (Paragraph 002, Reference ID: 2b-002-20140306) and guidance is provided on the need for a town centre strategy (Paragraph 003, Reference ID: 2b-003-20140306). Under this section on town centre strategy, the Section explains that the strategy should answer questions on what the appropriate and realistic role and function of town centres are,

and should 'cover a three-five year period, but should also take the lifetime of the Local Plan into account and be regularly reviewed'.

- 2.3.9 The NPPG also provides guidance on market signals when planning for town centres (Paragraph 04, Reference ID: 2b-004-20140306). It explains that local planning authorities should take full account of relevant market signals when planning for town centres and that retail land allocations should be kept under regular review. The NPPF explains that market signals should be identified and analysed in terms of their impacts on town centres and should be used to inform policies that are response to changes in the market, as well as changing needs of businesses.
- 2.3.10 When assessing the health of town centres, paragraph 005 (Reference ID 2b-005-20140306) of the NPPG sets out 10 indicators that are relevant when assessing the health of town centres. We assess these indicators in Sections 5 and 6 of this study. This section of the NPPG also explains that '*not all successful town centre regeneration projects have been retail led or involved significant new development*'. It also explains that '*any strategy should identify relevant sites, actions and timescales, and be articulated clearly in the Local Plan*'.

## 2.4 Changes to permitted development rights

- 2.4.1 The Town and Country Planning (General Permitted Development) (England) Order 2015 (GDPO) came into force in April 2015 and a subsequent amendment came in to force on 6th April 2016. The GDPO 2015, as amended, makes provision for a range of permitted development rights affecting main town centre use classes, as follows:
- Allowing the change of use from shops (A1), financial and professional services (A2) (limited up to 150 sqm), betting offices, pay day loan shops and casinos to restaurants and cafes (A3), subject to prior approval
  - The removal of betting offices and pay day loan shops from the A2 use class and reclassification as sui generis
  - Allowing the change of use from retail (A1) and specified sui generis uses (betting offices, pay day loan shops and laundrettes) (limited up to 150 sqm) to residential (C3), subject to prior approval
  - Allowing the change of use from shops (A1) to financial and professional services (A2). Prior approval not required
  - Permitting up to 200 sqm of shops (A1) and financial professional services (A2) to change to assembly and leisure uses (D2), subject to prior approval
  - Making permanent the existing time limited rights for extensions to shops, offices, industrial and warehouse buildings. Prior approval not required
  - Permitting one click and collect facility per retail premises (maximum 4m height and 20 sqm gross floorspace), subject to prior approval
  - Allowing retailers to modify the size of existing shop loading bays up to 20%, subject to prior approval

- Allowing the change of use between offices (B1(a)) and residential (C3) subject to prior approval except for excluded areas (Listed under Part 3 of Schedule 1 of the GPDO Order 2015) which will have their exclusion extended to May 2019
- Allowing for the change of use between light industrial (Class B1(c)) to residential (C3) (limited up to 500 sqm) for a temporary period up to 30th September 2017, subject to prior approval.

2.4.2 While the majority of these changes are subject to prior approval, Central government has clarified that prior approval applications are not planning applications, and they are therefore not required to be determined against the development plan. Instead the legislation sets out a number of matters against which applications are considered, a test of impact on 'key shopping areas' is one of these requirements.

2.4.3 These changes provide local authorities some scope to consider impact on existing centres but the ethos of allowing greater flexibility within town centres sitting behind the legislation is clear. This represents a step change from local policies still in SHDC and WDBC development plan, which seek to closely control the mix of uses, particularly the proportion of A1 retail uses within designated town centres.

## 2.5 Key findings

A new JLP is being prepared, and the NPPF and NPPG makes it clear that evidence is needed on the following:

- the amount of land or floorspace required to meet quantitative and qualitative needs for retail and leisure development
- the role and function of town centres and the relationship between them, including any trends in the performance of the centres
- the capacity of existing centres to accommodate new town centre development.

There is also a requirement for retail policies to:

- Define a network and hierarchy of centres
- Define the primary shopping area in each centre including primary and secondary shopping frontages
- Allocate a range of suitable sites to meet assessed needs for retail, leisure and other town centre uses in full applying the NPPF sequential order of search
- Define criteria against which proposals for main town centre uses in out of centre locations will be assessed
- Define an appropriate locally set threshold for retail impact testing.

## 3 Market signals and economic trends

### 3.1 Introduction

- 3.1.1 This section summarises key trends in the retail and leisure sectors which are likely to influence demand for new floorspace across the study area. The second part of this section will summarise the headline economic forecasts which feed into the quantitative assessment of retail and leisure needs in Section 6 and 7.
- 3.1.2 The UK's decision to leave the EU will pose a challenge for the retail sector in the years to come although the long-term impacts of Brexit are difficult to predict and, at present, there is limited published evidence. Early indicators are that 'Brexit' will not have a uniform effect on retailing across the Country. For example, in the months immediately after the referendum retailers' announced that the devaluation of the pound would result in businesses and consumers paying increased prices for imported goods. However, in Central London retail trade is expected to benefit from increased tourist spending as a result of the weak pound.

### 3.2 Market signals

- 3.2.1 The market context for town centres, and retail in particular, is continuously evolving. The traditional role of the town centre has been undermined by the increased popularity of online retailing and reduced retail expenditure growth rates. Indications are that the town centres which have best weathered the recent economic downturn are those which have a diverse range of uses. In this section the key changes in the retail and leisure market that are considered likely to have the most significant implications on town centres are discussed, these include:

- Polarisation
- Restructuring of the convenience (food) goods sector
- Growth of commercial leisure sector
- Impact of digital technology

#### Polarisation

- 3.2.2 Since the last economic downturn retailers have had to rapidly adapt their business strategies and store formats to changing economic circumstances including reduced consumer expenditure growth, changing customer requirements and growth of multi-channel retailing. The culmination of these factors has had a polarising effect on investment activity in the retail market.
- 3.2.3 In the comparison sector national retailers have increasingly sought to concentrate their trading activities within larger retail centres and out of town retail parks. Since the downturn, the quality and diversity of the retail offer in the largest 'Top 100' centres has improved relative to small and medium town centres which have struggled to retain key anchor retailers. In 2011, Deloitte estimated that the

polarisation trend could result in portfolio reductions of between 30 to 40% in the short to medium term in certain retail categories<sup>1</sup>.

- 3.2.4 Many national multiple retailers have sought to rationalise their property portfolios to remain competitive. Operating a strategic network of large stores in larger centres with capacity to stock larger product ranges provides greater efficiency compared to a network of smaller-format stores which offer a limited range of products. Larger centres are generally better placed to accommodate retailers' requirements for large format modern units since they are more likely to have benefitted from investment over the last 10 years. The growing popularity of multi-channel retailing enables retailers to reach their same customer base with fewer physical stores.
- 3.2.5 Out of centre retail parks have also become increasingly attractive to both consumers and retailers since the downturn. The share of comparison retail sales conducted through town centre shops declined from 64% in 2002 to just over 40% by 2013 and out of centre superstores and retail parks have been one of the main beneficiaries<sup>2</sup>.
- 3.2.6 The retail warehousing market has experienced increased levels of demand from traditional high street retailers since the downturn and as a result retail park vacancy levels have reduced down to pre-recession levels<sup>3</sup>. Retail parks typically provide modern retail units in highly accessible locations which are better suited to meet the requirements of national retailers for larger units in highly accessible locations. Key national anchor retailers have continued to invest in new large format stores in out of centre locations such as John Lewis at Home and Next Home. These larger stores display a wider range of products and provide click and collect facilities in convenient accessible locations. Out of centre retail parks are seen to be better placed to serve the multi-channel customer.
- 3.2.7 Retail parks have also become destinations in their own right offering customers an enhanced shopping experience. Due to increased operator demand and a shortage of new floorspace landlords have focused on improving the quality of existing stock through refurbishment, public realm improvements and introducing a greater range of uses such as leisure facilities.
- 3.2.8 The retail development pipeline across the UK has slowed and 2012 saw the lowest quantum of new floorspace delivered in the UK since the 1990's. The scale and type of investment is different to that experienced during the 'golden age' of shopping centre development, between 1997 and 2007.
- 3.2.9 In line with the polarisation trend, investment in new comparison retail floorspace is becoming increasingly concentrated in the larger city centres and regional shopping centres. Since 2012 a number of major retail schemes opened including Trinity Shopping Centre in Leeds owned by Land Securities in 2013; Old Market in Hereford owned by British Land in 2014; and, Grand Central in Birmingham owned by Birmingham City Council in late 2015<sup>4</sup>.

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<sup>1</sup> Deloitte LLP, The Changing Face of Retail (2011)

<sup>2</sup> Peter Brett Associates, Investing in the High Street: Town Centre Investment Management (2013)

<sup>3</sup> Colliers International, Heading out of town-the changing landscape of the retail warehousing market (2016)

<sup>4</sup> BCSC, Shopping Centre Development Pipeline Report (2013)



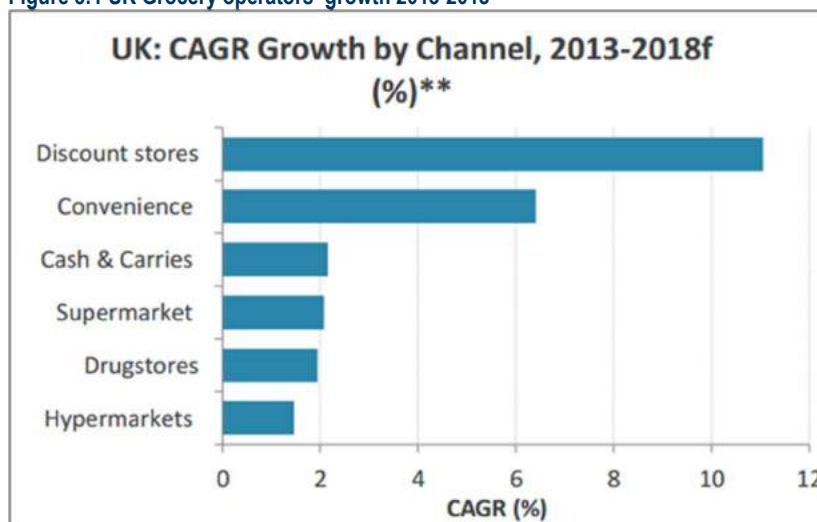
## Restructuring of the convenience sector

3.2.10 During the economic downturn the convenience goods sector was a key driver of growth. This sector has traditionally been dominated by the 'Big Four' supermarket operators: Asda, Morrisons, Tesco and Sainsbury's and large foodstores (2,300 sqm net) were the primary driver of growth in the sector. However, structural changes have taken place in the sector, as follows:

- Discount food operators: operators such as Aldi and Lidl have increased their market share of the grocery market significantly and are continuing to expand;
- 'C-format' stores: major grocery retailers have expanded their network of smaller convenience stores in order to increase their market share (Tesco Express, Sainsbury's Local and Little Waitrose); and,
- Online shopping: the 'race for space' over the last decade has resulted in major operators investing in online grocery shopping in order to increase market shares.

3.2.11 Discount retailers are now important forces in the convenience goods market and are expected to continue to take market share from the Big Four supermarket operators. As shown in Figure 3:1, between 2013 and 2018 the compound annual growth rate (CAGR) of discount retailers (such as Aldi and Lidl) and convenience (C-format stores) is expected to reach 11% and almost 7% respectively whereas the growth rate among supermarkets is forecast at just 2%.

Figure 3:1 UK Grocery operators' growth 2013-2018



Source: European Grocery Retailing (2016) Planet Retail

3.2.12 Verdict expects that the proportion of floorspace accounted for by 'smaller stores' will increase from 37.6% in 2007 to 41.6% by 2017. This shift has been driven by a shift in consumer behaviour; shoppers are undertaking an increased number of smaller 'top-up shopping' or 'basket shopping' trips instead of a weekly food shop to a large out of centre foodstore. This trend has been exacerbated by the growth of online grocery shopping, as customers undertake top-up shopping to supplement the main grocery delivery.

3.2.13 Convenience operator's business models have shifted towards the expansion of smaller 'C-format' stores. Both Sainsbury's and Tesco now have more 'C-stores' than large supermarkets. In January 2015, Tesco announced they would abandon the development of 49 'very large' foodstores and close 43 unprofitable stores. Both Sainsbury's and Morrisons have also withdrawn from a number of large development schemes.

### Growth of the commercial leisure sector

3.2.14 Demand from the commercial leisure sector is forecasts to remain strong into 2017 and leisure uses, such as cafes, bars, restaurants and cinemas, will constitute a growing share of town centre floorspace<sup>5</sup>. This is partly a replacement activity generated as a consequence of the reduced demand for traditional retail space, and partly driven by the increase in leisure expenditure as discretionary household expenditure rises. Key trends for each sub-sector are described below<sup>6</sup>:

- Cinema: expected to expand via acquisition and diversification of the market despite falling attendance figures over the last two years. The big three cinema operators are focusing on larger markets where there is limited competition. The second tier and boutique operators are focusing on the qualitative difference in their offer to enable them to create specialist markets.
- Restaurant: contributed significantly to the continued growth of the leisure sector throughout and since the recession. Demand for A3 space is being driven by the regional expansion of successful A3 operators established in London.
- Health and fitness: the market is expected to experience continued growth in market value with annual memberships increased from 12.6% to 13.2% and 177 new facilities opened in the year up to 2014 predominantly in the budget sector.
- Class D2 leisure use (Children's Play): resurgence from the large format D2 leisure operators since the last economic downturn. Operators are offering increasingly diverse activities with companies from abroad seeking space in the UK (e.g. laser combat and trampolining) as a result of consumer's spending more disposable income on leisure-based activities.

3.2.15 When considering leisure expenditure available to households, spending on food and drink typically accounts for more than 50% of total leisure spending, compared to around 15% on 'cultural services' (e.g. going to the cinema, theatre, art galleries or live music) and under 10% on hotels, games of chance and recreation/sporting services.

3.2.16 There is scope for town centres to capitalise on this trend, redefining their function as leisure 'destinations' in their own right. The development of a strong commercial leisure offer can help to increase footfall, particularly outside of retail hours, and visitors undertaking 'linked trips' between retail, leisure and other uses also spend increased dwell-time in centres.

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<sup>5</sup>UK Shopping Centre and High Street Spotlight Q3, Savills World Research, Savills (2016)

<sup>6</sup> UK Commercial Market in Minutes, Savills World Research, Savills (2015)

## Impacts of digital technology

- 3.2.17 The rapid uptake of digital technology in the retail sector has facilitated the growth of online sales which has had a noticeable impact on the built environment in terms of the ways in which retailers utilise physical floorspace. The increased threat posed by internet retailing has prompted many national retailers to adopt new business strategies. In the non-food sector, the most competitive retailers have rationalised their property portfolios and focused new investment in online retailing (web development, mobile retailing and click and collect) in order to boost the efficiency of their operations.
- 3.2.18 Experience has shown that retailers who have invested in multi-channel retailing have proved most successful in recent years. Multi-channel retailing includes a digital online retail presence complimented by physical stores located in a range of accessible and attractive locations. Some retailers are increasingly utilising digital technology in order to drive footfall and in-store purchases. Examples of such practices include:
- in-store handheld internet devices: to provide customers with detailed product information and enable online ordering;
  - geo-referencing: sending information to customers' mobiles about offers and promotions when they pass close to a store; and,
  - mobile loyalty card programmes: allow offers to be tailored to individuals shopping habits.

## 3.3 Economic trends

- 3.3.1 This section provides an overview of key retail and leisure forecasts taken from the latest Experian Retail Planner Briefing Note (ERPBN14) including expenditure growth, multi-channel retailing and floorspace efficiency growth, which inform the estimates of expenditure capacity set out in Section 7.

### Expenditure growth

- 3.3.2 The UK referendum result, to leave the EU, has created major economic uncertainty in the short-term which is expected to take a toll on investment and hiring plans while, at the same time, the recent decline in sterling will result in higher inflation. According to Experian, this combination of slower employment growth and higher inflation is expected to reduce retail sales growth to just 1% in the short-term (2017-2018).
- 3.3.3 Table 3:1 shows the forecast growth for convenience, comparison and leisure spending per capita for five distinct periods; pre-recession (1997-2007); the recession and its aftermath (2008-2011); the recovery (2012-2015); medium-term forecast (2016-2025) and long-term forecast (2016-2035). This allows for an easy comparison of historic and long-term trends.
- 3.3.4 In the short-term, retail spending growth will slow sharply as a result of economic uncertainty related to the Brexit vote according to Experian. Convenience retail spending growth is forecast to slow from 0.0% in 2016 down -0.9% in 2019 and comparison from 3.3% in 2016 down to 1.0% in 2018. Leisure spending is also expected to slow quickly from 1.9% in 2016 down to 0.2% in 2018.

**Table 3:1 Summary of long-term retail growth prospects**

Growth per capita	Annual average growth (%)				
	1997-2007	2008-2011	2012-2015	2016-2025	2016-2035
<b>Period</b>					
<b>Total retail</b>	5.1	-0.5	2.1	1.8	2.1
<b>Convenience</b>	-0.3	-3.2	-1.0	-0.1	0.1
<b>Comparison</b>	8.0	0.6	4.1	2.7	3.0
<b>Leisure</b>	-0.9	-3.3	1.7	1.2	1.3

Source: Figure 1 and figure 2, ERPBN14 (November 2016)

- 3.3.5 Retail sales volumes are expected to recover in the medium-term as Brexit-related uncertainty subsides which is reflected in the higher retail spending growth rates forecast from 2016-2025 as shown in Table 3:1. It should be noted that this scenario assumes an orderly transition process with continued access to the EU single market.
- 3.3.6 In the long-term, forecast growth in retail sales per capita will recover to reach 2.4% although this is well below the historic pre-recession rate of 5.1% for the reasons set out above. The failure of the convenience sector to post a sustained recovery in recent years despite the strengthening of household finances has resulted in Experian's long-term growth forecasts remaining subdued over the long term (0.1%). Experian's long term comparison growth forecast will remain significantly lower than the pre-recession period (8.0%) due to the economic constraints posed by Brexit and the ongoing need for fiscal restraint.
- 3.3.7 Leisure spending is forecast to perform well in the long-term compared to historic trends as shown in Table 3:1. Experian expect that spending will reach 1.5% in the long-term (2026-2035) which is a reversal of the historic trend of declining per capita leisure expenditure as experienced between 1997-2009.

### Multi-channel retailing

- 3.3.8 Special Forms of Trading (SFT), driven by the increasing popularity of internet shopping, has significantly outpaced traditional retail sales in recent years and Experian forecast that it will continue to do so for several years to come. SFT data is collected by the ONS and includes all non-store retail sales (internet, catalogue, outdoor markets, telephone sales and door to door).
- 3.3.9 SFT now accounts for 15% of all retail sales and the growth of SFT over the last decade has been driven by the increasing popularity of online shopping. Internet sales have been rising much more rapidly than general retail sales in recent years. The share of internet sales as a share of total retail sales increased significantly from 4.7% in June 2008 to 11.7% in mid-2016.
- 3.3.10 Experian expect that the growth of non-store (SFT) retailing will continue to outperform traditional forms of spending. The SFT share of retail spending is forecast to reach 18.6% by 2022 and 20.4% by the mid-2030's. The continued growth of internet retailing over this period will be sustained by the uptake of new technology,

such as mobile shopping and interactive TV shopping. Table 3:2 sets out Experian's adjusted SFT market share growth forecasts up to 2035.

**Table 3:2 Adjusted Special Forms of Trading Market Shares (%)**

	2016	2018	2026	2031	2035
<b>Total SFT</b>	9.6	10.6	12.7	13.3	13.8
<b>Comparison</b>	13.2	14.4	16.1	16.3	16.5
<b>Convenience</b>	3.0	3.4	4.6	5.0	5.3

Source: Figure 5, ERPBN14 (November 2016)

- 3.3.11 The rise of internet retailing has changed how retailers utilise traditional retail outlets and internet retailing is now seen as both a threat and an opportunity to businesses.
- 3.3.12 The growth in online sales has generally had the most negative impact on those sectors which are more exposed to the digitisation of products and services, such as electrical goods, books and music. As a result, the number of retailers selling these products from 'bricks and mortar' stores has reduced over recent years. The failure of retailers to adapt to new shopping habits and to develop a complimentary online shopping platform has led to the high profile closure of national retailers including Woolworths, Blockbuster and BHS.
- 3.3.13 Retailers which have developed a successful multi-channel shopping offer are expected to see increasing demand for retail floorspace driven by online sales growth. Multi-channel retailing refers to an integrated shopping offer whereby retailers utilise traditional stores as a showroom for products, a service location and a collection/drop off point for online orders. Receiving specialised product information and the opportunity to view, compare and test products before purchase is becoming increasingly important to customers and this trend will continue to support demand for retail floorspace.

### Sales density growth

- 3.3.14 Sales density growth, also referred to as floorspace efficiency growth, refers to the ability of retailers to achieve increases in their turnover year on year that exceed inflation. It is important for retail assessments to take this into account since it allows for a certain amount of expenditure growth to be 'ring-fenced' to be spent within existing businesses. This is also important for retailers to remain viable over time.
- 3.3.15 Conventionally, retail capacity assessments make an allowance for the year on year growth in average sales densities of existing floorspace as a claim on expenditure growth. Since there is limited evidence on annual turnover growth achieved by retailers it has been necessary to make informed assumptions about sales density growth in the convenience and comparison sector based on data provided by industry bodies, Experian and Pitney Bowes.
- 3.3.16 The quality and configuration of floorspace will determine its ability to achieve sales density growth. Modern large format retail units have greater potential to grow its sales density year on year compared with small traditional shop units. In the

comparison sector, a range of expenditure growth rates are applied from 2016 onwards depending on the nature of the property offer, as follows:

- High (2.5%): locations with a significant proportion of modern retail property or a high quality retail offer (i.e. premium retailers);
- Medium (1.9%): locations with a mix of modern and older retail properties and a mixed retail offer; and,
- Low (1.5%): locations with a significant proportion of older retail properties or a low quality retail offer (i.e. discount stores)

3.3.17 This is a PBA estimate which is considered to be consistent with the long-term year on year expenditure growth forecast at around 2.0% by Experian.

3.3.18 The ability for the convenience sector to improve its turnover year on year is restricted due to the high trading levels that already exist relative to the comparison sector. Experian forecast negative growth rates in the convenience sector up to 2024 when growth will resume at just 0.1% from 2024-2035. For these reasons PBA have not allowed for the existing floorspace to improve its turnover year on year.

### 3.4 Key findings

The key findings of this section are set out below:

- **Polarisation to higher-order centres:** National comparison retailers are increasingly rationalising their property portfolios with a fewer large stores concentrated in high order centres shopping malls and regional centres.
- **Restructuring of the convenience goods sector:** Since the economic downturn major retailers have increased their network of small in-centre stores and invested in online shopping while discount food operators such as Aldi and Lidl have increased their market shares.
- **Growth of the commercial leisure sector:** Commercial leisure uses will constitute a growing share of town centre floorspace driven in part by the increase in household leisure expenditure and reduced demand for retail space in secondary centres.
- **Effects of digital technology:** Digital technologies facilitating online sales have altered the ways in which retailers utilise physical floorspace and it is likely that new technologies will impact on the retail sector in unpredictable ways.

In terms of economic conditions, the approach is as follows:

- **Retail expenditure growth:** Experian estimates a growth rate of 2.1% per annum between 2016 and 2025 for comparison goods. The growth rate for convenience expenditure will remain flat at 0.0% over the longer term.
- **Leisure expenditure growth:** Experian forecasts growth rate at 1.5% per annum between 2016 and 2025 for leisure.
- **Growth in e-commerce:** Experian forecast that growth in non-store retailing will outperform traditional retailing and that the SFT share of retail spending will continue to increase up to the mid 2030's driven by the uptake of new technology.
- **Sales density growth:** PBA assume a range of efficiency growth rates for existing comparison floorspace from 1.5% to 2.5% per annum but no growth for existing convenience floorspace.

## 4 South Hams: hierarchy of centres

### 4.1 Introduction

- 4.1.1 This section considers the role and function of centres in SHDC and identifies out of centre retail floorspace and competing retail destinations. The Core Strategy identifies Dartmouth, Ivybridge, Totnes and Kingsbridge as the highest order centres.
- 4.1.2 The health check assessments presented in this section seek to assess the town centres against the NPPG indicators set out in Table 4:1. A detailed analysis of ‘customer views and behaviour’ has not been included in this report since there is currently no available information on customer views of SHDC centres except for Ivybridge. Chapter 7 of the IRLS provides a detailed assessment of customer views of Ivybridge town centre and should be read alongside the health check in this report. Commercial yields data has not been included in the report since there are no current sources of this information for SHDC centres.

Figure 4:1 NPPG town centre health indicators

Vitality and viability of town centres: key Indicators	
Diversity of uses	Proportion of vacant street level property
Commercial yields on non-domestic property	Customer view’s and behaviour
Retailer representation and intentions to change representation	Commercial rents
Pedestrian flows	Accessibility
Perception of safety and occurrence of crime	State of town centre environmental quality

- 4.1.3 There are currently no published retailer requirements for any of SHDC town centres according to Shop Property which publishes property requirements for retailer and leisure operators (Class A3-A5) across the UK. This may be attributable to the fact that this resource is mainly used by national retailers and the decreasing use of this resource by retailers generally. The absence of retail requirements in SHDC reflects the nature of retail provision in the town centres which contain a strong independent retail offer. All of SHDC centres have low recorded vacancy levels by national standards which indicates that there is strong local demand for retail units despite the lack of published property requirements.
- 4.1.4 This section assesses local centres in SHDC in order to determine to what extent centres are meeting local retail needs and **Appendix E** contains proportionate health check assessments for the six local centres. The final part of this section summarises the key findings of a consultation with local property agents undertaken in 2014.
- 4.1.5 Monitoring the health of centres provides a benchmark of current performance, it identifies opportunities for growth, warning signs where centres may be in decline and gaps in the local retail or leisure offer. The key findings from this section will inform the qualitative assessment of retail and leisure need in SHDC (Section 8) and will



feed into the report recommendations. **Appendix F** considers the role of the main competing centres and out of centre retail destinations located in neighbouring authorities.

- 4.1.6 PBA undertook site visits of SHDC centres in October in 2016. The town centre health checks presented in this section are based upon Experian GOAD land use data updated by PBA following site visits and a schedule of uses for each town centre is provided at **Appendix G** which also contains GOAD maps showing the distribution of uses and vacant units in each centre. The Ivybridge health check also draws on evidence from the IRLS.

## 4.2 Ivybridge

- 4.2.1 Ivybridge is the smallest of the four town centres with 88 units which is located in the east of SHDC. By comparison, Kingsbridge has 172 units, Totnes has 221, and Dartmouth has 152 units according to GOAD data. The centre is characterised by a traditional linear layout; the majority of retail units are located along Fore Street, the Glanville Mill shopping centre and Erme Court. Glanville Mill provides small units occupied by a mix of comparison and food and drink operators and one larger unit occupied by the Co-op supermarket. Erme Court provides some larger units occupied by comparison retailers which provide the main bulky goods retail offer in the town.

### Diversity of uses

- 4.2.2 Table 4:1 below compares the proportion of unit town centre unit types found in Ivybridge town centre, and their floorspace, against the national average figure. This is used as a tool for identifying where there is an over or under provision of certain unit types in Ivybridge.

**Table 4:1 Ivybridge town centre diversity of uses compared to the national average**

Use	Ivybridge units	UK units average %	Ivybridge sqm %	UK sqm % average
<b>Convenience goods</b>	11.8%	9.3%	21.4%	18.4%
<b>Comparison goods</b>	38.8%	39.7%	45.0%	44.9%
<b>Food and drink</b>	14.1%	17.1%	8.9%	12.7%
<b>Service (excl. food and drink)</b>	27.1%	20.6%	17.4%	12.8%
<b>Miscellaneous</b>	1.2%	1.9%	1.2%	1.0%
<b>Vacant units</b>	7.1%	12.2%	6.1%	10.2%

Source: GOAD and PBA Update (October 2016)

### Convenience goods

- 4.2.3 Table 4:1 shows that the provision of convenience units and floorspace in the town centre is marginally greater than the national average, accounting for 12% and 21% respectively, compared to 9% and 18% nationally.

- 4.2.4 The convenience offer comprises a Co-op supermarket located within the Glanville Mill shopping centre, Tesco Express and local grocery shops. There is a small selection of independent butchers, baker's delicatessen, confectioners and health food stores. There are currently no open air food markets in the town centre and no evident space for the future provision of markets in the town centre.

### **Comparison goods**

- 4.2.5 Table 4:1 shows a similar representation of comparison retail units in Ivybridge compared to the national average, accounting for 39% of units in Ivybridge, compared to 41% nationally. The proportion of comparison floorspace in Ivybridge is equivalent to the national average (45%).
- 4.2.6 There is a noticeably poor representation of clothing stores in Ivybridge across all categories, particularly for separate Men's and Women's stores. There is a good representation of units within the 'Furniture, carpets & textiles stores' category as well as 'Books, arts/craft and stationary' and 'Cars, motorcycles and accessories' category. There is also a noticeably strong representation from charity shops.
- 4.2.7 There is a limited representation from national multiples which include, Tesco Express, the Co-op and Peacocks. The centre contains a high proportion of independent retailers in the comparison goods sector which account for approximately 85% of the comparison goods floorspace offer in the town centre.

### **Service retailers**

- 4.2.8 Table 4:1 shows the percentage of units and floorspace of service retailers in Ivybridge compared to the national average. Service retailers include restaurants and cafes, as well as hairdressers, travel agents, banks and estate agents. The table demonstrates that, excluding food and drink, the provision of service retailers in Ivybridge is above national averages. This is demonstrated both by the number of units (25% compared to 20% nationally) and floorspace (16% compared to 13% nationally).

The provision of service operators within the 'Restaurants and cafes' category in Ivybridge is greater than national averages. This is demonstrable both in the number of units (27% compared to 17% nationally) and floorspace (17% compared to 13% nationally). Notably, within the service category there is also an oversupply of 'Hairdressing, beauty and health' operators, accounting for 15% of units, compared to 10% nationally.

### **Proportion of vacant property**

- 4.2.9 The level of vacancies in a town centre provides an indicator of local operator demand. Ivybridge is performing well in respect of vacancy levels. At the time of the GOAD survey (October 2016) vacant properties occupied just 7% of the total number of units compared to the national average of 12%. This represents a marginal increase in the number of vacant properties compared to 2014, where vacant properties occupied 6.4% of total units. Vacant floorspace in Ivybridge accounts for 6% of total floorspace which is below the national average at 10%.

## Commercial rents

- 4.2.10 The level of rent that businesses are prepared to pay for retail space in a centre provides an indication of its relative strength as a shopping location. Figure 4:2 shows the average asking rents for retail premises in Ivybridge recorded by Co-Star between 2011 and 2016. According to Co-Star, asking rents in Ivybridge over the past five years have fluctuated from between £13 to £19 per sqft. Asking rents fell sharply from £19 to £14 between Q3 and Q4 2016.
- 4.2.11 Rents in Ivybridge are relatively low compared to other centres in the study area. For example, over the same period (2011-2016) rents in Totnes varied between £19 and £29 per sqft and in Kingsbridge, between £11 and £14 per sqft. This would suggest that demand is relatively weaker in Ivybridge, however it must be noted that the data does not provide a comprehensive picture of retailer demand since Co-Star does not provide data for every property transaction.

**Figure 4:2 Ivybridge asking rents per sqft (2011 - 2016)**



Source: CoStar (2016)

## Retailer requirements

- 4.2.12 There are currently no retailer requirements for Ivybridge town centre published by Shop Property. Shop property is an online resource which publishes property requirements for retailer and leisure operators (Class A3-A5) in both town centre and out of town locations across the UK. Although published requirements are a useful tool to compare the relative attraction of different centres they do not provide a complete picture of retail demand and it should not be understood to mean that there is no retailer demand in Ivybridge.
- 4.2.13 The lack of published retailer requirements for Ivybridge may be attributable to the fact that this resource is mainly used by national retailers and the decreasing use of this resource by retailers generally. This reflects the nature of retail provision in Ivybridge which is comprised of mainly independent retailers, rather than national multiples. Ivybridge has low recorded vacancy levels by national standards which indicates that there is strong local demand for retail units.

## Evidence of tourism

- 4.2.14 There are relatively few facilities directed specifically towards the tourist market in Ivybridge. A tourist information centre, located in the Watermark Centre on Leonards Road appears to be the only tourist facility. Compared to other towns in SHDC the town does not provide a range of restaurants, attractions and accommodation to meet visitor requirements.

## Accessibility and pedestrian flows

- 4.2.15 Ivybridge is accessible by rail; the train station is located approximately 1 mile (20 mins) walk from the town centre and provides rail services to Totnes, Plymouth and London Paddington. The town is also connected by local bus services with bus stops are located throughout the town centre.
- 4.2.16 The town centre is well served by car parking facilities. There are two large parking areas north of the Ivybridge Police Station (c. 80 and 160 spaces). A further car park accommodating circa. 84 spaces are accommodated in Erme Court. Two small car parks are located on the periphery of the town centre at Harford Road (c.26 spaces) and Keaton Road (c.22 spaces).
- 4.2.17 Ivybridge Town Centre generally has a good level of pedestrian accessibility. This is enabled by low levels of traffic along Fore Street (a one-way street), and the use of speed bumps to slow traffic speed. Many of the key retail streets, including Fore Street also benefit from wide pavements which contribute to an improved pedestrian experience. However, many shops have step only access which reduces accessibility for disabled and less able users.
- 4.2.18 Shopping centres typically have a negative impact on pedestrian flows through town centres. The site visit demonstrated there is some redirection of pedestrian flows from the town centre to Glanville Mills; however, the effect is likely to be marginal. In any case, the location of Glanville Mills to the rear of the main shopping frontage enhances pedestrian accessibility from Fore Street towards the River Elme Crossing, Leisure Centre and Car Park.

## Perception of safety and occurrence of crime

- 4.2.19 There is a strong perception of safety in the town centre. The main routes through the town have active frontages which provide natural surveillance. The low levels of evening and night time economy uses reduce the likelihood of alcohol induced anti-social behaviour, contributing to a high perception of safety in the town.
- 4.2.20 Figures obtained from national police statistics reveal that shoplifting accounted for 7.5% of crime reported September 2015/16 in Ivybridge town centre. Anti-social behaviour accounted for 37% of crime reported in Ivybridge town centre during this period<sup>7</sup>.

## Environmental quality

- 4.2.21 The town centre is well maintained with very little evidence of littering, graffiti or other eye sores. The core retail area includes attractive street frontages, signage and

<sup>7</sup> <https://www.police.uk/devon-and-cornwall/DEV.4008/crime/stats/>

planting throughout which enhance the quality of the public realm. The building quality is generally high, and shop fronts are generally well maintained. Wide pavements are prevalent throughout the town centre and are well maintained. The town centre's property stock is mainly comprised of small retail units with few large format units suitable to accommodate national retailers.

4.2.22 The Glanville Mills shopping area is a particularly pleasant area of Ivybridge located adjacent to the River Erme which appears clean and well maintained. Green spaces along the riverbank contribute to a high quality environment with picturesque views of the river and mills.

### Summary

4.2.23 Ivybridge town centre is considered in our health checks as performing well against NPPG indicators. We have assessed the number of vacant units in the centre, and compared it with the most recent Experian Goad Survey of the centre. The GAOD survey identified that vacancy levels of retail units are very low (7%) compared to the national average (12%).

4.2.24 Convenience goods are fairly well represented in Ivybridge. The majority of convenience floorspace is formed of a Co-op supermarket. The town also benefits from smaller food stores including a Tesco's Express and McColl's. In accordance with the towns historic market identify, the centre has a number of smaller specialist convenience retailers such as butchers, bakers and delicatessen. Comparison retailers have a similar representation of units to the national average, however are more highly represented in floorspace.

4.2.25 Service units, particularly restaurants and cafes, have a higher representation in Ivybridge compared to the national average. Our analysis showed that there is a greater proportion of service floorspace than the other town centres in SHDC.

4.2.26 Ivybridge is characterised by a high proportion of independent retailers, with national multiples comprising approximately 15% of A1 retail units within the town centre. There is a relative lack of evening economy uses and visitor facilities in Ivybridge compared to Dartmouth and Totnes town centre's which receive a greater amount of trade from visitors.

4.2.27 The high quality public realm in Ivybridge contributes to an enjoyable pedestrian experience, and there does not appear to be any significant conflict between pedestrian and vehicles within the town centre. The town has sufficient quantities of visitor parking and is well connected by various methods of public transport.

4.2.28 Figure 4:3 below provides a SWOT analysis which summarises the main strengths, weaknesses, opportunities and threats of Ivybridge town centre.

**Figure 4:3 SWOT analysis of Ivybridge town centre**

Strengths	Opportunities
<ul style="list-style-type: none"> <li>• Environmental quality and public realm</li> <li>• Pedestrian accessibility</li> </ul>	<ul style="list-style-type: none"> <li>• Enhance leisure and restaurant offer</li> <li>• Increase tourism by enhancing leisure opportunities, supporting independent</li> </ul>

<ul style="list-style-type: none"> <li>Low vacancy rates and high proportion of independent retailers</li> </ul>	retailers and maintaining / enhancing a high quality public realm
<b>Weaknesses</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>Low representation of evening economy uses</li> <li>Few opportunities for leisure and tourism</li> </ul>	<ul style="list-style-type: none"> <li>Spending leakage to Plymouth and Lee Mill Tesco Extra</li> <li>Lack of operator demand due to changing retail demand and consumer habits</li> </ul>

### 4.3 Totnes

Totnes is located in the west of SHDC and it is the largest town centres with 221 units. The centre is characterised by a traditional linear layout; the majority of retail units are located along the High Street at the western end of the centre and Fore Street at the eastern end of the centre. Budgens supermarket is located directly behind Fore Street to the north and Morrisons supermarket is located on the edge of the centre further north of Fore Street. The Market Square which hosts regular open air markets is located directly to the south of the High Street.

#### Diversity of uses

Table 4:2 Totnes town centre diversity of uses

Use	Totnes units average %	UK units average %	Totnes sqm %	UK sqm % average
<b>Convenience goods</b>	10.5%	9.3%	28.0%	18.4%
<b>Comparison goods</b>	57.7%	12.2%	46.2%	44.9%
<b>Food and drink</b>	15.9%	17.1%	13.5%	12.7%
<b>Service (exc. Food)</b>	12.7%	20.6%	9.7%	12.8%
<b>Miscellaneous</b>	1.4%	1.9%	0.9%	1.0%
<b>Vacant units</b>	1.8%	12.2%	1.6%	10.2%

Source: GOAD and PBA Update (October 2016)

- 4.3.1 Table 4:2 compares the proportion of unit types found in Totnes town centre, and their floorspace, against the national average figure. This is used as a tool for identifying where there is an over or under provision of certain unit types in Totnes. These figures are taken from the Totnes GOAD, updated by PBA in October 2016.

#### Convenience goods

- 4.3.2 Table 4:2 shows that there is a healthy supply of convenience units in the town centre. Whilst the representation of convenience units in Totnes (10.5%) is marginally

greater than the national average (9.3%), the convenience floorspace representation is considerably greater than the national average (28% in Totnes, compared to 18% national average). This variation is attributable to the large Morrisons supermarket and moderately sized Budgens store, which together provide 63% of the total convenience floorspace offer in Totnes.

- 4.3.3 There is a good representation of traditional convenience retailers, including baker's butchers and green grocers. Specialist convenience retailers, such as confectioners and delicatessen, are also well represented in Totnes, many of which are targeted at tourists and visitors. The presence of multiple health food stores, including Holland and Barrett, and independent health stores, indicate changing consumer trends and a growing demand for health foods in Totnes.
- 4.3.4 A farmer's market takes place every Friday and Saturday in the Market Square. The Market Square forms part of the 'Totnes Central Area', which is allocated in the emerging Joint Local Plan for mixed-use development. The space is valued by the local population; a public petition, which has collected over 4,000 signatures to date, reveals public concern over loss of the Market Square to redevelopment.

### **Comparison goods**

- 4.3.5 Table 4:2 shows there is a good representation of comparison goods retailers in Totnes compared to the national average. The representation of comparison floorspace in Totnes (46%) is only marginally greater than the national average (45%). However, the representation of comparison units in Totnes (58%) is considerably greater than the national average (40%). This demonstrates the prevalence of smaller comparison retail unit sizes in Totnes against the national average.
- 4.3.6 In respect of the representation from multiple operators, the GOAD survey identifies multiple retailers such as Crew Clothing Co., Fat Face, Peacocks, The Edinburgh Woollen Mill, WHS Smith and Superdrug. The remainder of comparison retailers are local chains or independent retailers, which provides a strong local and independent retail offer.
- 4.3.7 There is a particularly strong representation from the 'Books, arts, crafts and stationary', 'Gifts, china, glass and leather goods' and 'Charity shop' categories. The representation of these categories, in addition to the strong independent offer, provides a retail offer which is targeted towards the tourist and visitor market.

### **Service retailers**

- 4.3.8 Table 4:2 shows there is a poor representation of non-food and drink service retailers in Totnes. These comprise 13% of unit representation and 10% of floorspace representation in the town centre. In comparison, nationally these figures amount of 21% and 13% respectively.
- 4.3.9 The GOAD survey shows that there is good representation from service retailers. Within the food and drink service category, there is a mix of different outlets including representation of cafes, restaurants, and fast food restaurants. There is no representation of multiple nationals within the cafes, restaurants and fast food category, as all units are operated by independent providers.

- 4.3.10 Within the D2 leisure category, Totnes is limited to a social club and two community halls. The town is significantly lacking in leisure facilities such as cinemas, sports halls and gyms. At present, a community project, the Totnes Cinema Community Interest Company (CIC) is seeking to restore the Totnes Cinema. SHDC granted planning permission on 15<sup>th</sup> July 2015 for the restoration of the former cinema located at 27a High Street (ref: 56/0443/15/F).

### Proportion of vacant property

- 4.3.11 The level of vacancies in a town centre provides an indicator of local operator demand. The representation of vacant units in Totnes falls significantly below the UK average, both in terms of units and floorspace. At the time of the PBA GOAD update vacant properties occupied just 2% of the total number of units, compared to the national average of 12%. This represents a marginal increase in the number of vacant properties since 2014 when vacant properties comprised 2.6% of the total number of units. Vacant floorspace accounted for 2% of the total floorspace at the time of the PBA survey which is also far lower than the national average of 10%.
- 4.3.12 Site visits conducted by PBA in October 2016 show that the majority of vacant units are located on High Street. These account for 4 out of 7 vacant units in Totnes. This concentration of vacant units is likely to be on account of the high proportion of retail units on High Street, rather than an indication of poor health on High Street.

### Evidence of tourism

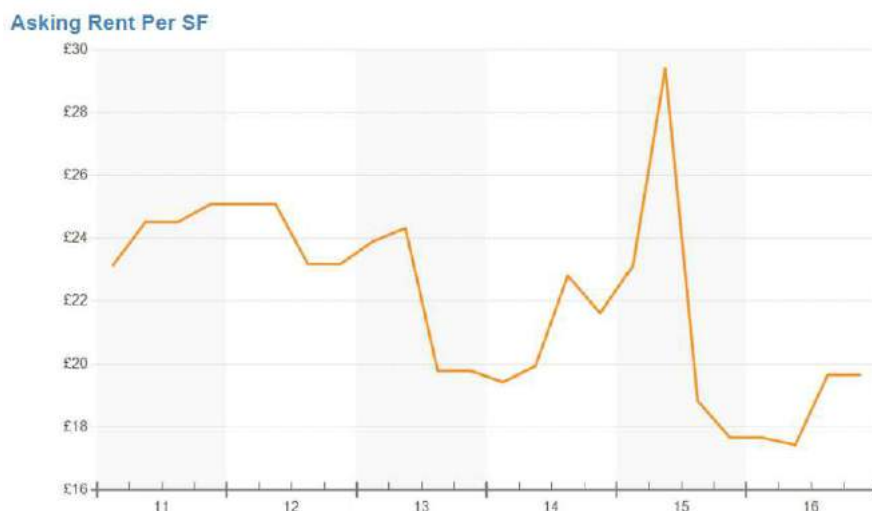
- 4.3.13 Totnes clearly benefits from a strong tourism and visitor market, encouraged by the town's identity as a historic market town and its numerous local landmarks. The majority of tourism activity in Totnes is likely to be seasonal. However, the town is still likely to attract a small level of tourist activity throughout the year.
- 4.3.14 The most prominent tourist attraction is Totnes Castle, located close to the main retail area, north of High Street. The town centre also includes various other facilities focussed towards tourists and visitors, including a Visitor Information Centre, three historic gardens, and art galleries. There is also a strong presence of local museums in the town, including Totnes Elizabethan Museum and The Museum of Costume, Fashion and Textiles.

### Commercial rents

- 4.3.15 The level of rent that businesses are prepared to pay for retail space in a centre provides a further indication of the relative strength of the centre as a shopping location.
- 4.3.16 Figure 4:4 shows the average asking rents for retail premises in Totnes recorded by Co-Star between 2011 and 2016. According to Co-Star, asking rents in Totnes over the past five years have fluctuated between £18 and £29 per sqft with a downward trend over the last five years, excluding a dramatic peak Q2 2015. Asking rents in Totnes struck a five-year low in Q4 2015 falling below £18 per sqft. The record of a particularly high or low value deal can skew time-series data for smaller town centres, such as Totnes, which naturally have a more limited number of deals.



Figure 4:4 Totnes asking rents per sqft (2011 - 2016)



Source: CoStar (2016)

- 4.3.17 Rents in Totnes are relatively high compared to other centres in the study area. For example, over the same period (2011-2016) rents in Ivybridge varied between £13 and £19 per sqft and in Kingsbridge, between £11 and £14 per sqft. This would suggest that demand is relatively strong in Totnes, however it must be borne in mind that the data does not provide a comprehensive picture of retailer demand since Co-Star does not provide data for every property transaction

### Retailer requirements

- 4.3.18 There are currently no published retailer requirements for Totnes available from Shop Property. Although published requirements are a useful tool to compare the relative attraction of different centres they do not provide a complete picture of retail demand and it should not be understood to mean that there is no retailer demand in Totnes.
- 4.3.19 The lack of published retailer requirements for Totnes may be attributable to the fact that this resource is mainly used by national retailers and the decreasing use of this resource by retailers generally. This reflects the nature of retail provision in Totnes which is comprised of mainly independent retailers, rather than national multiples. Totnes has low recorded vacancy levels by national standards which indicate that there is strong local demand for retail units. Furthermore, a number of retail units were under alteration at the time of PBA's site visit which demonstrates that retailers are investing in the town centre.

### Accessibility and pedestrian flows

- 4.3.20 Totnes is considered to be accessible for pedestrians; the main retail streets, Fore Street and High Street, are characterised by one-way traffic, pedestrian crossings, and speed bumps to reduce vehicle speed. These contribute to a safer pedestrian experience and reduce opportunities for conflict between different road users.
- 4.3.21 The main route into Totnes via the A381 provides easy access into the town centre by car. There is a good level of car parking provided by multiple public car parks. These comprise Old Market (c.28 spaces), Civic Hall (c.22 spaces), Heaths Nursery (c.83 spaces), The Nursery (c.73 spaces), Heath Way (c.22 spaces & 46 spaces),

and Victoria Street (c.130 spaces). However, there is an opportunity to provide free car parking in the centre as all public car parks currently require payment or are 'customer only' facilities.

- 4.3.22 The town centre is accessible by rail, with Totnes train station located approximately 0.3 miles (7 minutes' walk) from the High Street. The town benefits from a National Express coach station and local bus services. Owing to the town's historic street layout, there is a noticeable lack of cycling infrastructure provided in the town centre. Some cycle parking racks are located on some of the towns' wider pavements.
- 4.3.23 At the time of the GOAD survey (October 2016), a number of sites were being redeveloped in the town centre, and there appeared to be some traffic and congestion issues resulting from the construction sites and associated vehicles. However, any problems resulting from construction are likely to be temporary and redevelopment of these sites demonstrates investment in the town centre, which will modernise the town centre.

### Perception of safety and occurrence of crime

- 4.3.24 There is a positive perception of safety in Totnes town centre, driven by a high pedestrian footfall throughout the town centre and pedestrianised area. Fore Street and the southern end of High Street are characterised by active street frontages which provide natural surveillance. The northern end of High Street is characterised by less active street frontages which may create a perception of vulnerability to crime, however this is unlikely to be considered a 'no-go area'. Furthermore, there is also limited provision of evening economy uses, which reduce the likelihood of alcohol induced anti-social behaviour, thus enhancing the feeling of safety in the town centre.
- 4.3.25 Figures obtained from Cornwall Police department crime statistics database reveals the number of crimes committed in Totnes town centre over the past two years (2014/15 and 2015/16). The figures show that shoplifting accounted for 5% of crimes during this period. Anti-social behaviour accounted for 47% of crimes committed during this period<sup>8</sup>.

### Environmental quality

- 4.3.26 Totnes benefits from a good environmental quality, in part achieved by an attractive historic street scene and prominent landmark buildings. A key feature in the town is 'Eastgate', an archway which spans across the street, where High Street meets Fore Street. The town centre is also well maintained and clean, with minimal evidence of litter, graffiti or other eyesores.
- 4.3.27 Owing to the historic nature of the town centre, the town has limited street furniture and narrow pavements, particularly on the key retail streets of Fore Street and High Street. Wider pavements and street furniture are more prevalent where there is a looser street layout, such as on the Plains. Market Square, although providing a valued area of public space, is fairly low quality, and could benefit from improvement works or redevelopment.
- 4.3.28 At the time of the GOAD survey, numerous construction sites and associated vehicles were observed to detract from the townscape and emit noise pollution, which is

<sup>8</sup> <https://www.police.uk/devon-and-cornwall/DEV.4004/crime/stats/>

accentuated by the town's narrow streets. However, it is recognised that this is a temporary hindrance, and once complete, construction work will improve the environmental quality of the town centre.

## Summary

- 4.3.29 Totnes town centre is considered to perform well against the NPPG indicators. Our assessment found that retail unit vacancy rates are very low (2%) compared to the national average (12%).
- 4.3.30 Convenience goods are particularly well represented in Totnes, the majority of the floorspace comprising of two larger retailers, Morrisons and Budgens. In line with its historic, market identity the centre also has a significant number of smaller traditional convenience retailers such as butchers and greengrocers. Comparison retailers have a significantly higher representation compared to national averages, whilst service retailers and units associated with an evening economy have a lower representation.
- 4.3.31 The presence of independent retailers creates a unique shopping offer in Totnes and enhances the vitality and viability of the centre which appears to be performing well as evidenced by low vacancy rates. Independents account for approximately 80% of the total A1 floorspace which means that Totnes provides a unique shopping environment, and one that appears successful and vibrant as evidenced by low vacancy levels. Table 4:3 presents a SWOT analysis which summarises the main strengths, weaknesses, opportunities and threats of Totnes town centre.

**Table 4:3 SWOT analysis of Totnes town centre**

Strengths	Opportunities
<ul style="list-style-type: none"> <li>• Strong tourist and visitor economy</li> <li>• Low unit vacancy rates and high proportion of independent retailers</li> <li>• Well maintained centre, with high levels of cleanliness</li> </ul>	<ul style="list-style-type: none"> <li>• Maintain and enhance visitor economy through increased leisure, restaurant and evening economy offer</li> <li>• Enhance public space, through redevelopment of the 'Totnes Central Area'</li> </ul>
Weaknesses	Threats
<ul style="list-style-type: none"> <li>• Narrow pavements and limited street furniture owing to a historic street network</li> <li>• Some poorer quality buildings and public space, such as Market Square and Civic Hall</li> <li>• Lack of D2 leisure uses, such as cinemas and gyms</li> </ul>	<ul style="list-style-type: none"> <li>• Deterioration of public realm through lack of maintenance of historic buildings and unsympathetic redevelopment</li> <li>• Seasonal trading variations with lower footfall outside of peak season</li> </ul>

## 4.4 Kingsbridge

- 4.4.1 Kingsbridge is the second largest town centre with 172 units. The centre is characterised by a traditional linear layout; the majority of retail units are located along Fore Street and the adjoining side streets. The Anchor shopping centre is located at the southern end of the town centre on Bridge Street and the Kings Market

Shopping Mall, a small shopping arcade, is located off Fore Street. Tesco and Morrisons supermarkets are located to the east of Fore Street on Cookworthy Road.

### Diversity of uses

- 4.4.2 Table 4:4 compares the proportion of unit types found in Kingsbridge town centre, and their floorspace, against the national average figure. This is used as a tool for identifying where there is an over or under provision of certain unit types in Kingsbridge. These figures are taken from the Kingsbridge GOAD, updated by PBA in October 2016.

**Table 4:4 Kingsbridge town centre diversity of uses compared to national average**

Use	Kingsbridge average units	UK units average %	Kingsbridge sqm %	UK sqm % average
<b>Convenience goods</b>	10.5%	9.3%	26.7%	18.4%
<b>Comparison goods</b>	44.8%	39.7%	43.9%	44.9%
<b>Food and Drink</b>	12.8%	17.1%	8.2%	12.7%
<b>Service (excl. food &amp; drink)</b>	26.2%	20.6%	16.9%	12.8%
<b>Miscellaneous</b>	0.6%	1.9%	0.0%	1.0%
<b>Vacant units</b>	5.2%	12.2%	4.3%	10.2%

Source: GOAD and PBA Update (October 2016)

### Convenience goods

- 4.4.3 Table 4:4 shows that the proportion of convenience units in Kingsbridge (11%) is marginally greater than the national average (9%). Convenience floorspace representation is considerably greater than the national average (27% in Kingsbridge, compared to 18% national average). This variation is attributable to the large Tesco's supermarket and moderately sized Morrisons store, which together provide 68% of the total convenience floorspace offer in Kingsbridge.
- 4.4.4 The supermarkets in Kingsbridge are complemented by a selection of traditional and specialist convenience providers, including butchers, bakeries, and fishmongers. Kingsbridge also provides a number of health food stores including a Holland and Barrett, and small independent health food providers.
- 4.4.5 The convenience retail offer is also complemented by Kingsbridge Market, which operates from the Square at Quay Car park on Tuesdays, Thursdays (March – December) and Mondays (May – September). The Square at Quay also holds bi-monthly farmer's markets on Saturdays, providing locally sourced food produce, such as meats, fish, breads and vegetables.

### Comparison goods

- 4.4.6 Table 4:4 shows that Kingsbridge contains a similar proportion of comparison floorspace in Kingsbridge (44%) compared to the national average (45%). There is a relatively greater number of units in Kingsbridge (46% compared to 40% nationally) which indicates that there is a higher proportion of small units in Kingsbridge. The Anchor Shopping Centre represents just 2% of the total comparison floorspace in the town centre.
- 4.4.7 The comparison retail offer is generally aimed towards the middle market and provides a range of goods which are largely sold by independent retailers. The retail offer provided by national multiples constitutes 23% of the comparison floorspace in Kingsbridge and includes a WH Smith, The Card Shop, Go Mobile, Vision Express, Co-op Pharmacy, Oxfam, Oxfam Books and Cancer Research.
- 4.4.8 The 'Furniture, carpets & textiles' and 'Books, arts, crafts and stationary' categories are particularly well represented in Kingsbridge. Kingsbridge also has a good clothing and fashion offer for a centre of its size. The majority of units are medium to high end independent boutiques as there is only one national multiple present, Peacocks.

### Service retailers

- 4.4.9 Table 4:4 shows that there is a relative oversupply of service retailers in Kingsbridge compared to national averages. This is evident both in food and non-food service retailers and in terms of floorspace and number of units. Within the service retailers sector, whilst there is a marginal oversupply of laundrettes, travel agents, banks and building societies, there is a marginal undersupply of restaurants, hairdressers and estate agents.
- 4.4.10 The majority of the A3 - A5 leisure uses are independent operators. A Costa Coffee Shop and Cod Father take-away restaurant provide the only representation from national multiples. The remainder of provision is formed of local independent restaurants and cafes.
- 4.4.11 The D2 leisure offer is also relatively limited, comprising a Bingo Hall, Community Hall and the Reel Cinema. The Reel Cinema has three screens, and is considered a small facility in relative to the size of Kingsbridge.

### Proportion of vacant property

- 4.4.12 The level of vacancies in a town centre provides an indicator of local operator demand. Kingsbridge is performing well in respect of vacancy rates. Table 4.5 shows that the representation of vacant units in Kingsbridge is markedly below the UK average. At the time of the GOAD survey (October 2016), vacant properties occupied just 5% of the total number of units, compared to the national average of 12%, and 4% of the total amount of floorspace, compared to the national average of 10%.
- 4.4.13 This represents a marginal increase in the number of vacant properties compared to 2014, where vacant properties occupied 5.3% of the total number of units in Kingsbridge.

## Evidence of tourism

4.4.14 There is evidence of some provision of tourism facilities in Kingsbridge, including an information centre, museum, shops selling local gifts and post cards. Overall, the tourism industry in Kingsbridge is fairly limited compared to other centres in SHDC, such as Salcombe and Dartmouth. As such, the town is unlikely to receive the same number of visitors, or the same level of associated spending.

## Commercial rents

4.4.15 The level of rent that businesses are prepared to pay for retail space in a centre provides a further indication of the relative strength of the centre as a shopping location. Table 4:5 Table 5:4 shows the average asking rents for retail premises in Kingsbridge recorded by Co-Star between 2011 and 2016. According to Co-Star, asking rents in Kingsbridge over the past five years have fluctuated from between £11 and £14 per sqft with a five-year average of £12.34. Following a peak in Q2 2014, rents fell to a 5-year low in Q2 2016.

4.4.16 Rents in Kingsbridge are relatively low compared to other centres in the study area. For example, over the same period (2011-2016) rents in Totnes varied between £19 and £29 per sqft and in Ivybridge between £13 and £19. This would suggest that demand is relatively weaker in Ivybridge, however it must be noted that the data does not provide a comprehensive picture of retailer demand since Co-Star does not provide data for every property transaction

Figure 4:5 Kingsbridge asking rents per sqft (2011 -2016)



Source: CoStar (2016)

## Retailer requirements

4.4.17 There are currently no published retailer requirements for Kingsbridge available from Shop Property. Although published requirements are a useful tool to compare the relative attraction of different centres they do not provide a complete picture of retail demand and it should not be understood to mean that there is no retailer demand in Kingsbridge.

4.4.18 The lack of published retailer requirements for Kingsbridge may be attributable to the fact that this resource is mainly used by national retailers and the decreasing use of this resource by retailers generally. This reflects the nature of retail provision in Kingsbridge which is comprised of mainly independent retailers, rather than national multiples. Kingsbridge has low recorded vacancy levels by national standards which indicate that there is strong local demand for retail units.

### **Accessibility and pedestrian flows**

4.4.19 Kingsbridge has moderate to good levels of pedestrian accessibility. In some areas, particularly at the south of the town centre, pedestrian accessibility is enhanced by wide pavements. In other areas, where the town centre is characterised by historically narrow streets, the pavements are narrower which provides potential for conflict between road users, particularly during busy times. A number of shops have step-only access, with reduced accessibility for disabled users. This is prevalent on Fore Street, where the road gradient is steep.

4.4.20 Owing to the town's historic street layout, there is a noticeable lack of cyclist provision in the town centre. Some cycle parking racks are located on some of the towns' wider pavements; however, there are no cycle lanes within the town centre.

4.4.21 There is a good provision of public car parks in Kingsbridge. This comprises provision on Fore Street (c. 110 spaces), The Quay (c. 266 spaces), Cattle Market (c. 188 spaces) and Duncombe Park (c. 15 spaces). All of these car parks require payment. There is therefore an opportunity to provide free public car parking in the town centre to attract visitors. The town is accessible by bus; however, the town lacks rail infrastructure to enable travel into the town by rail.

### **Perception of safety and occurrence of crime**

4.4.22 Kingsbridge town centre has a strong perception of safety. There is no evidence of vandalism within the centre and the main routes through the town have active frontages which provide natural surveillance. Some areas of the town have less active frontages, particularly at the north and south of the centre, and where the streets become narrow. However, these are unlikely to be considered 'no-go' areas or areas for opportunistic crime. There are very few evening economy uses, which reduce the likelihood of alcohol induced anti-social behaviour, thus enhancing the feeling of safety in the town centre.

4.4.23 Figures obtained from national police statistics reveal that shoplifting accounted for 10% of crime reported between 30th September 2015 and 1st October 2016, an 8% reduction on the previous year. Antisocial behaviour accounted for 37% of crime reported in Kingsbridge during this period<sup>9</sup>.

### **Environmental quality**

4.4.24 Kingsbridge town centre is largely characterised by small units, particularly in the town's historic network of narrow streets. Some larger units are located at the south of the town centre, for example on Ilbert Road and Bridge Street. The environmental

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<sup>9</sup> [https://www.police.uk/devon-and-cornwall/DEV.4009/crime/stats/#crime\\_trend](https://www.police.uk/devon-and-cornwall/DEV.4009/crime/stats/#crime_trend)

quality in the town centre is generally of a high standard with minimal littering and no evidence of vandalism.

- 4.4.25 The Quay public house occupies a prominent position in the town centre at the junction of Fore Street and Bridge Street. The pub closed in October 2016 and it appeared poorly maintained at the time of the PBA site visit detracting from the street scene.
- 4.4.26 The provision of landscaping in the town centre provides an attractive public realm. Again, this is more prevalent near the Quay, where there is greater space for planting and street furniture. Hanging baskets are prevalent along some of the main retail streets, including Fore Street, which contribute to an attractive shopping environment. There is good provision of street furniture, such as benches and litter bins. These are more prevalent in The Quay market area and along the Quay footpath, and less frequent on the town's narrower streets, where space is more limited.

### Summary

- 4.4.27 Kingsbridge is considered as performing well against NPPG indicators, and to fulfil its role as one of SHDC town centres. The centre has a low proportion of vacant units against national standards, at 7% compared to 12%.
- 4.4.28 Our analysis demonstrated that the centre generally provides a high quality environment for visitors save for some smaller environments off the main retail street such as the Anchor Centre and the surrounding streets, which appear less vibrant and where vacancies are more prevalent.
- 4.4.29 Similar to Totnes, the centre has a greater representation of convenience and comparison retailers than the national average and lower representation of service retailers which reinforces the role and function of Kingsbridge as a town centre. Kingsbridge is well served by two large convenience retailers, Tesco and Morrisons, which occupy prominent positions on the edge of centre the town centre and appear to draw customers into the centre. The centre is also well served by smaller convenience stores, which combined; represent a sizeable proportion of the total floorspace (2,150 sqm). Kingsbridge has a limited evening economic which is comprised of the 3-screen Reel cinema and a number of pubs and restaurants.
- 4.4.30 Although the centre appears to be well served by a number of car parks, access to the centre is constrained partly due to its rather secluded geographic location. It is considered that Kingsbridge would predominantly serve residents in fairly close proximity to the centre, unlike centres such as Ivybridge and Totnes, transportation links are less well established. Figure 4:6 provides a SWOT analysis which summarises the main strengths, weaknesses, opportunities and threats of Kingsbridge town centre.

**Figure 4:6 SWOT analysis of Kingsbridge town centre**

Strengths	Opportunities
<ul style="list-style-type: none"> <li>• High environmental quality</li> <li>• Strong provision of public car parks, which facilitate town centre visitors</li> </ul>	<ul style="list-style-type: none"> <li>• Boost tourism industry using strength of Quayside location, maintaining / enhancing environmental quality and supporting independent retail provision</li> </ul>



<ul style="list-style-type: none"> <li>Well served by two large convenience retailers, Tesco and Morrisons which attract custom to the town centre</li> </ul>	<ul style="list-style-type: none"> <li>Opportunity to enhance position as a key retail centre, due to high parking provision, supermarkets and strong retail offer</li> </ul>
<b>Weaknesses</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>Poor provision of evening economy services</li> <li>Less well established transport links, and relative isolation of the town centre</li> <li>Less vibrant tourism economy than some of the Districts other locations (such as Dartmouth and Salcombe)</li> </ul>	<ul style="list-style-type: none"> <li>Degrading retail units in some areas, such as the Anchor Shopping Area</li> <li>Failure to attract leisure operators, such as restaurants and cafes, due to competition from higher performing centres such as Salcombe and Dartmouth</li> </ul>

## 4.5 Dartmouth

4.5.1 Dartmouth, located in the south east of SHDC on the eastern side of the River Dart estuary, is the second smallest town centre with 152 units. The layout of the town centre with its network of small streets reflects the historic nature and organic growth of the town. The Market Square is located in the centre of the town and provides permanent stalls for traders set within an attractive public realm. There are three small food stores which are dispersed throughout the town centre; Marks & Spencer's simply food, Co-op and Spar.

### Diversity of uses

4.5.2 Table 4:5 below compares the proportion of unit types found in Dartmouth town centre, and their floorspace, against the national average figure. This is used as a tool for identifying where there is an over or under provision of certain unit types in Dartmouth. These figures are taken from the Dartmouth GOAD updated by PBA in October 2016.

Table 4:5 Dartmouth town centre diversity of uses compared to national average

	Dartmouth units	UK units average %	Dartmouth sqm % average	UK sqm % average
<b>Convenience goods</b>	13.2%	9.3%	18.0%	18.4%
<b>Comparison goods</b>	50.0%	39.7%	52.8%	44.9%
<b>Food &amp; drink</b>	15.8%	17.1%	13.8%	12.7%
<b>Service (excl. food &amp; drink)</b>	16.4%	20.6%	11.4%	12.8%
<b>Miscellaneous</b>	1.3%	1.9%	1.3%	1.0%
<b>Vacant units</b>	3.3%	12.2%	2.6%	10.2%

Source: GOAD and PBA Update (October 2016)

### **Convenience goods**

- 4.5.3 Table 4:5 shows a healthy level of representation of convenience retailers in Dartmouth. Whilst the representation of convenience floorspace is alike to the national average (18% in Dartmouth, 18.36% nationally), representation of convenience units is above the national average (13% in Dartmouth, 9% nationally). This demonstrates the prevalence of smaller convenience unit in Dartmouth, rather than larger units, and indicates a good variety of food stores.
- 4.5.4 The convenience offer in Dartmouth consists of a large Marks & Spencer's, a Co-op food store and small Spar convenience store. There are also a number of specialist traditional convenience retailers, including butchers, bakers, fishmongers, green grocers and delicatessens. There is a notable provision of bakers and confectioners within this category, selling local goods such as pasties and fudge, targeted to the tourist market.
- 4.5.5 The convenience offer is complemented by Dartmouth Farmers Market, an open air food market which takes place in Market Square every second Saturday of the month, between 9am and 1pm. A variety of locally sourced goods are available, including fruits and vegetables, meats, fish and bread.

### **Comparison goods**

- 4.5.6 Table 4:5 shows a relative oversupply of comparison retailing in Dartmouth compared to the national average. This is evident both in the number of units (50% in Dartmouth compared to 40% nationally) and floorspace (53% compared to 45% nationally). There is a good mix of comparison retailers operating from small, medium and large units.
- 4.5.7 The comparison goods retail offer provides a variety of different types of goods. There is a noticeably strong representation within the 'Books, arts/crafts and stationary category' and 'Florist and Gardeners' category. Dartmouth is less well represented by the 'Charity shops' and 'Chemists, toiletries and opticians'.
- 4.5.8 Whilst the majority of the comparisons goods offer is formed of independent retailers, Dartmouth has a stronger representation of national multiples than some of the other centres in SHDC, accounting for approximately 17% of comparison floorspace. There is a particularly strong representation of national multiples within the men's and women's clothing categories. These are targeted at the mid-high end range, and include retailers such as Henri Lloyd, Fat Face, Joules, M & Co, Weird Fish and Saltrock.

### **Service retailers**

- 4.5.9 Table 4:5 shows there is a relative under supply of service operators in Dartmouth town centre. This is particularly prevalent within the non-food and drink category, which account for just 17% of units, compared to 21% nationally, and 11% of floorspace, compared to 13% nationally.
- 4.5.10 Dartmouth has a reasonable representation of A3 – A5 services, falling only marginally below national averages in terms of units (16% in Dartmouth, compared to 17% nationally), but marginally above national averages in terms of floorspace (14% in Dartmouth, compared to 13% nationally). There is a good provision of A4 drinking

establishments compared to other town centres in SHDC; however, these are mainly comprised of public houses.

- 4.5.11 The D2 leisure category in Dartmouth comprises of two social clubs and the Flavel arts and entertainment facility. Whilst the two social clubs are likely to cater for the older population, the Flavel, which includes a cinema, theatre, library and commercial exhibition space cater all for all age groups.

### Proportion of vacant property

- 4.5.12 The level of vacancies in a town centre provides an indicator of local operator demand. Dartmouth is performing well in respect of town centre vacancy rates. Table 4:5 shows that the representation of vacant units in Dartmouth is markedly below the UK average. At the time of the GOAD survey (October 2016), vacant properties occupied just 3% of the total number of units, compared to the national average of 12%, and 3% of the total amount of floorspace, compared to the national average of 10%. The proportion of vacant properties in Dartmouth has stayed constant since 2014 at 3%.

### Evidence of tourism

- 4.5.13 The tourism industry is more prominent in Dartmouth than any other town centre. This is most notable in the variety of shops targeted towards the tourist market such as gift shops, locally sourced food goods such ice cream, fudge and pasties, and high end clothing retailers. There are also a number of hotels and guest houses in the town centre, amounting to 780 sq. m of hotel and guest house floor within the GOAD study area.

### Commercial rents

- 4.5.14 The level of rent that businesses are prepared to pay for retail space in a centre provides an indication of its relative strength as a shopping location.

Figure 4:7 Dartmouth asking rents per sqft (2011 - 2016)



Source: CoStar (2016)

- 4.5.15 Figure 4:7 shows the average asking rents for retail premises in Dartmouth recorded by Co-Star between 2011 and 2016. According to Co-Star, asking rents in Dartmouth over the past five years have fluctuated between £10 and £37 per sqft. Following a substantial peak in asking rents in Q2 2012, asking rents in Dartmouth have continued to fall reaching £20 per sqft at the time of the GOAD survey.
- 4.5.16 In 2016 asking rents in Dartmouth at £22 per sqft were relatively high compared to some other centres in the study area including Kingsbridge at £11 and Ivybridge at £14. This suggests that demand is relatively stronger in Dartmouth, however it must be noted that the data does not provide a comprehensive picture of retailer demand since Co-Star does not provide data for every property transaction.

### Retailer requirements

- 4.5.17 There are no published retailer requirements available for Dartmouth town centre available from Shop Property. Although published requirements are a useful tool to compare the relative attraction of different centres they do not provide a complete picture of retail demand and it should not be understood to mean that there is no retailer demand in Dartmouth.
- 4.5.18 The lack of published retailer requirements for Dartmouth may be attributable to the fact that this resource is mainly used by national retailers and the decreasing use of this resource by retailers generally. This reflects the nature of retail provision in Dartmouth which is comprised of mainly independent retailers and fewer national multiples. Dartmouth has low recorded vacancy levels by national standards which indicate that there is strong local demand for retail units.

### Accessibility and pedestrian flows

- 4.5.19 Pedestrian access within Dartmouth could be improved by introducing better signage, particularly along some of the small side streets. The pavement quality is generally good although the concentration of on-street car parking within the town centre presents a potential risk of conflict between pedestrians and road users.
- 4.5.20 The town centre provides more limited provision of car parking facilities compared to other SHDC centres. Off-street parking facilities are available at Market Square (c.50 spaces), Euro Car Park (c.40 spaces), and Mayors Avenue (c. 35 and 175 spaces). Given the amount of visitors which are attracted to Dartmouth, there appears to be an undersupply of parking facilities within and nearby to the town centre. There is a significant amount of on street parking facilities in and around the town centre; however, these are often in use, resulting in the town feeling congested. In response to the lack of parking provision, particularly during busier summer months, a Park and Ride service runs from the car park on the outskirts of Dartmouth, where the A3122 joins with the A379, to Dartmouth Town Centre.
- 4.5.21 Bus services run from the town centre to Plymouth, Totnes and other neighbouring centres. However, Dartmouth does not have a train station which means that many tourists and visitors are reliant on car or bus travel, thus placing further strain on parking provision.
- 4.5.22 In terms of vehicle access, Dartmouth is more isolated than some of the other town centres in SHDC, which are closer to key roads such as the A38. The River Dart also reduces access to the centre somewhat from larger centres such as Paignton and

Torquay. Its retail offer therefore is suited towards both local inhabitants and the tourist economy.

### Perception of safety and occurrence of crime

- 4.5.23 Dartmouth town centre provides a good perception of safety. There is no perceptible evidence of crime or vandalism within the centre and the main routes through the town have active frontages which provide natural surveillance. Some of the narrower streets off the main shopping frontages are not fitted with street lighting, which may contribute to a poor sense of safety. However, these are generally overlooked by residential properties and unlikely to be considered as 'no-go' areas.
- 4.5.24 Figures obtained from national police statistics reveal that shoplifting accounted for 4% of crime reported between 30th September 2015 and 1st October 2016. Antisocial behaviour accounted for 35% of crime reported in during this period<sup>10</sup>.

### Environmental quality

- 4.5.25 The environmental quality in Dartmouth is very high and the majority of buildings are of a high quality and are well maintained. A number of buildings date back to the 17th century, many of which have attractive timber frames, and contribute to the historic character of the town centre. At the time of the site visit, the centre appeared very well maintained, with minimal litter and no evident of vandalism. The pavements appear to be generally well maintained however, along some of the smaller streets where there is less vehicle activity, pavements are absent.
- 4.5.26 The harbour and general topography of the area contribute to a pleasant shopping environment. The Royal Avenue Gardens provide an attractive setting and opportunities for leisure activities in close proximity to the town centre and many of the main retail streets benefit from planting in hanging baskets and potted plants.
- 4.5.27 The sea front benefits from attractive views across the bay and provides plenty of benches which enhance the public realm however; public seating throughout the remainder of the town centre is limited and could be improved.

### Summary

- 4.5.28 Our health check assessment of Dartmouth town centre shows that it performs very well against NPPG indicators. Dartmouth is sited in a picturesque location and offers a very attractive retail environment. Although tourism is prevalent in all of SHDC town centres, it is most evident in Dartmouth, with the most noticeable provision of tourist facilities, shops, restaurants and guest houses targeted towards tourists. It is evident that the tourism industry makes a significant contribution to the Dartmouth economy, however seasonal fluctuations are inevitable. Therefore, building upon the existing tourism provision to enhance out of season attractions to the town centre should be encouraged.
- 4.5.29 The retail environment in Dartmouth offers a different experience to SHDC other town centres. In particular, it seemingly caters towards higher income groups and the tourism industry. Convenience provision is made up of smaller units and there is an absence of one large, dominant retailer in the town centre. Instead, the Sainsbury's

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<sup>10</sup> <https://www.police.uk/devon-and-cornwall/DEV.4001/crime/+qZFobu/>

and Lidl supermarkets located on the western edge of Dartmouth provide for resident's main bulk shopping trips.

- 4.5.30 Comparison retail is considerably higher than the national average, although this is skewed due to the presence of a number of gift shops catering towards the significant tourist industry. This said, our analysis indicates that the area has a high proportion of clothing retailers, particularly a number of high end clothing retailers, which make up large percentages of the total comparison offer.
- 4.5.31 Access to Dartmouth is one of the most notable issues, as there is limited car parking within and immediately adjacent to the centre. However, a seasonal park and ride service does provide some additional capacity during the summer months.
- 4.5.32 Figure 4:8 provides a SWOT analysis which summarises the main strengths, weaknesses, opportunities and threats of Dartmouth town centre.

**Figure 4:8 SWOT Analysis of Dartmouth Town Centre**

Strengths	Opportunities
<ul style="list-style-type: none"> <li>• Attractive harbour and seafront</li> <li>• Strong tourism industry and facilities to cater to tourist and visitor demand</li> <li>• High quality built form, including well maintained historic timber framed buildings</li> </ul>	<ul style="list-style-type: none"> <li>• Build upon existing strength of the tourism industry to support the local economy</li> <li>• Attract tourism from further afield through increasing tourism offer</li> </ul>
Weaknesses	Threats
<ul style="list-style-type: none"> <li>• Inadequate provision of public car parking</li> <li>• Relatively incoherent network of streets, with poor street signage on smaller streets</li> <li>• Minimal leisure uses for existing residents, due to existing leisure uses targeted towards tourism industry</li> </ul>	<ul style="list-style-type: none"> <li>• Failure to cater for local needs through over representation of shops and services targeted towards tourism demand</li> <li>• Decline of tourism pull due to relative inaccessibility of the town centre (driven by poor parking provision)</li> <li>• Competing tourist demand from more accessible or 'up and coming' town centres in SHDC</li> </ul>

## 4.6 Local centres

- 4.6.1 This section provides an audit of the six local centres in SHDC. The focus of this assessment is to identify gaps in the provision of local retail facilities and opportunities to improve the retail offer. The audit includes a list of 17 shops, services and community uses, identified in Table 4:6, which could be provided in a local centre. **Appendix E** contains a proportionate health check for each local centre and provides further details on the local context.
- 4.6.2 While the audit provides a useful indication of the extent to which a centre is meeting the needs of local residents, the results must be considered in the local context and a range of other factors need to be considered, as follows:

- the size of a centre will restrict the number of shops and services each centre can offer
- the proximity of other town centres, local centres and out of centre stores, means that local need may already be met at an alternative location
- the quality of the shopping centre or parade, in terms of its environment, type and range of retailers will affect how it is perceived and used by local residents
- the relative accessibility of each centre will be an important factor in how local people use the local shops and services. For example, a lack of on-street car parking or poor local bus services may deter shoppers.

**Table 4:6 SHDC local centres audit**

Category	Woolwell	Yealmpton	Modbury	Salcombe	Chillington	Stokenham
Convenience food store	X		X	X	X	
Bank				X		
Post office		X		X	X	
Newsagent		X		X		
Off licence				X		
Takeaway, café or restaurant	X	X	X	X	X	
Public house		X	X	X		X
Bookmakers						
Laundrette/dry cleaners				X		
Hairdressers/beauty salon	X	X	X	X		
Florist						
Estate agents		X	X	X		
Community hall	X		X	X		
Doctor's surgery		X		X	X	
Library				X		
Chemist			X	X		
Dentists			X	X		

Category	Woolwell	Yealmpton	Modbury	Salcombe	Chillington	Stokenham
<b>Total score</b>	<b>4</b>	<b>7</b>	<b>8</b>	<b>15</b>	<b>4</b>	<b>1</b>

Source: PBA site visits (October 2016)

- 4.6.3 Salcombe, Modbury and Yealmpton each provide seven local facilities or more which suggests that most of residents' local needs are being met by these centres. Salcombe, which is the best served centre with 15 categories present, is an important tourist destination with a diverse high quality retail offer aimed at the tourist market. Modbury and Yealmpton are the next best served centres with eight and seven categories represented respectively. Modbury has an attractive traditional high street with a number of attractive historic buildings and a good diversity of uses for a centre of its size. Yealmpton provides a less attractive environment, but it contains a good range of essential facilities and is one of only two local centres with a Doctors surgery. There are no out of centre supermarkets serving the immediate catchment of Modbury or Yealmpton.
- 4.6.4 Stokenham, Chillington and Woolwell each have a local needs index score of four or less which suggests that the majority of residents' local needs are not being met by these centres. Woolwell is a small purpose built local centre with a limited diversity of uses; four out of six units are occupied by takeaways and there are two large out of centre supermarkets (Tesco Extra Woolwell Crescent and Lidl Towerfield Drive) located just 500m west of the centre. Stokenham and Chillington are both defined as local centres although the two settlements coalesce. Together, these centres only provide five facilities and there are no out of centre supermarkets serving the immediate catchment area.

## 4.7 Out of centre

- 4.7.1 Out of centre retail warehouse units, convenience superstores, garden centres and specialist food shops all compete with centres in SHDC for retail expenditure and footfall. Table 4:7 summarises the out of centre retail offer in SHDC.

Table 4:7 SHDC out of centre retail locations

Centre	Location	Store /facility
<b>Dartmouth</b>	Nelson Road	Sainsbury's
	Townstal Road	Lidl
<b>Ivybridge</b>	Lee Mill Industrial Estate	Tesco Extra
	Devon Expressway (A38)	Endsleigh Garden & Leisure, Countryman's Choice Farm Shop and Restaurant
<b>Kingsbridge</b>	Cookworthy Road	Tesco, Morisons



- 4.7.2 The out of centre retail offer in SHDC is characterised by large format out of centre supermarkets, primarily selling a wide range of convenience goods and a limited selection of comparison items (such as toiletries, electronic entertainment, books, stationary, pets and household items). Sainsbury's, Nelson Road provides a customer cafe and an improved comparison goods offer including clothing, toys and a wide range of electronic items.
- 4.7.3 SHDC contains almost no out of centre retail warehouse stores in the traditional bulky retail goods categories (pets, DIY, hardware, furniture, electronics and appliances). The nearest bulky goods retailers are located to the west of SHDC district at Coypool Road, Plympton and Marsh Mills Retail Park, Plymouth.

#### **4.8 Property agent consultation**

- 4.8.1 PBA undertook a consultation with local property agents in 2014 to support the draft SHDC retail and leisure study. The key findings of this consultation are considered to still be relevant to the current study.
- 4.8.2 The results of this consultation found that there had been very little new commercial floorspace delivered in recent years, including retail and leisure uses. Aside from a number of supermarkets emerging across SHDC, the majority of new retail space has been delivered through the refurbishments of existing units. Some consultees have suggested that there is pent demand for new retail floorspace across SHDC, due to the low vacancy rates and low churn rates in all of the town centres, meaning there is limited availability of new floorspace.
- 4.8.3 Consultees also stated that rents vary significantly across the district, with higher values achieved in Dartmouth and Salcombe partly due to the greater presence of premium national retailers such as Crew and Joules. The type of retailers that have expressed interest in locating to SHDC, differ by location however there is an emerging pattern that much of the demand is from retailers targeting higher income groups.

## 4.9 Key findings

This report has found that each town centre performs well against the NPPG health check indicators and the key drivers of town centre vitality and viability are local affluence and tourism, although the latter plays a greater role in some town centres. Our key findings area set out below:

- Totnes is the largest centre with 221 units in total. The town comprises a number of tourist attractions and it is apparent that tourism makes a significant contribution to the centre's vitality and viability. The town has a distinctive independent local retail offer in both the convenience and comparison sectors with a strong focus on local/organic produce. The leisure offer is somewhat limited as Totnes is the only town without a cinema.
- Kingsbridge is the next largest centre with 172 units. The town provides an attractive environment for visitors and the townscape is significantly enhanced by its Quay side setting. The Square at the Quay car park hosts a range of markets which enhance the towns shopping offer. Kingsbridge comprises a 3-screen Reel cinema. The town has a significant edge of centre convenience offer with a large Tesco and Morrisons supermarket.
- Dartmouth comprises 152 units. The town generally provides an attractive environment for visitors and the townscape is significantly enhanced by its sea side setting. However, the area around Bridge Street, Church Street and the Anchor Shopping Centre would benefit from public realm improvements to bring it in line with the rest of the centre. It is clear that the trade from tourism makes a significant contribution to the centre's vitality and viability and there are a range of shops and services aimed at the local tourist market (gift stores, guest houses and cafes). The centre has a good level of representation from premium fashion retailers, both national and independent operators.
- Ivybridge is the smallest town centre with 88 units. The town provides an attractive environment for visitors and the townscape is enhanced by its river side location. The town provides a good range of comparison units for its size concentrated in the Glanville shopping centre and Erme Court. The town centre also provides a good range of local facilities including the leisure centre and the Watermark centre which provides a library, cinema, business centre and space for community events.

South Hams contains a network of six local centres which play an important role in providing local top-up shopping and community facilities. The largest of these, Salcombe, is a popular tourist destination which contains a range of premium retailers.

Exeter and Plymouth are both popular shopping and leisure destinations for residents living in SHDC and as such compete, although not directly, with SHDC centres for footfall and expenditure. As regional shopping destinations Exeter and Plymouth perform a different role to town centres in SHDC and the concentration of national retailers and leisure facilities attracts spending from a wide catchment area. Plymouth and Torquay contain a significant out of centre retail offer which are both popular with residents in the study area.

## 5 West Devon: hierarchy of centres

### 5.1 Introduction

- 5.1.1 This section considers the role and functions of centres in WDBC and identifies out of centre retail floorspace and competing retail destinations. For the town centres of Okehampton and Tavistock, health check assessments are provided against the NPPG indicators set out in Figure 4:1 (Section 4). Commercial yields data has not been included in this report since there are no current sources of this data for WDBC centres. This section assesses the designated local centres in WDBC in order to determine the extent to which centres are meeting local retail needs. **Appendix E** contains proportionate health check assessments for the four local centres.
- 5.1.2 Monitoring the health of centres provides a benchmark of current performance, identifies opportunities for growth, warning signs where centres may be in decline and gaps in the local retail or leisure offer. The key findings from this section will inform the qualitative assessment of retail and leisure need in WDBC (Section 8) and will feed into the report recommendations (Section 10). **Appendix F** considers the role of the main competing centres and out of centre retail destinations located in neighbouring authorities.
- 5.1.3 PBA undertook site visits to WDBC centres in October in 2016. The town centre health checks presented in this section are based upon Experian GOAD land use data updated by PBA following site visits. A schedule of uses for each town centre is provided at **Appendix H** with updated GOAD maps showing the distribution of uses and vacant units in each centre. The health checks also draw on evidence from the Okehampton and Tavistock street interview surveys contained within the previous retail study, the TCRS.

### 5.2 Okehampton

- 5.2.1 Okehampton town centre is the smaller of the two WDBC town centres with 127 units according to GOAD data. The centre is located in the east of WDBC and 1km north of the Dartmoor National Park.
- 5.2.2 The town centre is characterised by a traditional linear layout; retail units are concentrated along Fore Street as well as the Red Lion Yard and The Arcade which respectively run north and south from Fore Street. The three town centre supermarkets (Waitrose, Co-op and Lidl) are concentrated on Market Street/School Way to the north of the town centre. The town centre property stock is predominantly comprised of small retail units except for the supermarkets which represent the most recent additions to the property stock.
- 5.2.3 Table 5.1 compares the proportion of different types of units found in Okehampton, and their floorspace against the national average figures to provide an indication of under provision or over provision of certain uses.

## Diversity of uses

Table 5:1 Okehampton diversity of uses compared to the national average

Use	Okehampton units %	UK units average %	Okehampton sqm %	UK sqm average %
Convenience Goods	8.7	9.3	32.4	18.4
Comparison Goods	48.0	39.7	35.8	44.9
Food and Drink	12.6	17.1	9.9	12.7
Service Retailers	21.3	20.6	15.2	12.8
Miscellaneous	1.6	1.2	1.0	1.0
Vacant Units	7.9	12.2	5.6	10.2

Source: Experian GOAD and PBA (2016)

### Convenience goods

- 5.2.4 Table 5:1 shows that there is a much greater supply of convenience floorspace in Okehampton compared against the national average. However, there are fewer convenience units than the national average. This reflects the nature of local convenience offer which is mainly comprised of 3 large supermarkets (Waitrose, Lidl and Co-op). This main offer is complemented by some small independent food stores (bakery, butchers and health food shops) but there are fewer than the national average.

### Comparison goods

- 5.2.5 In contrast, the table shows that there is a relative undersupply of comparison floorspace in Okehampton compared against the national average. However, there are far more comparison units than the national average. This reflects the local property offer which is mainly comprised of very small comparison units which are mostly operated by independent businesses. Most comparison sub-categories are represented in the town except for variety, department & catalogue and footwear & repairs. The mixed & general clothing and furniture, carpets & textiles sub-categories represent the greatest amount of floorspace. Overall the town provides a good variety of comparison shops for its size.

### Service retailers

- 5.2.6 Table 5:1 shows the proportion of service retailers and food and drink outlets in Okehampton are also both lower than the national average. The town contains a good range of retail services with each of the sub-categories represented save for laundrettes & dry cleaners. The food and drink offer is mainly comprised of pubs, cafes and tea shops which cater for the tourist trade and there are few family restaurants. Okehampton provides a very limited leisure offer for local residents; the New Carlton Cinema is the only D2 leisure facility within the town centre. The Parklands Leisure Centre is located next to Okehampton College to the south of the town centre.

## Proportion of vacant property

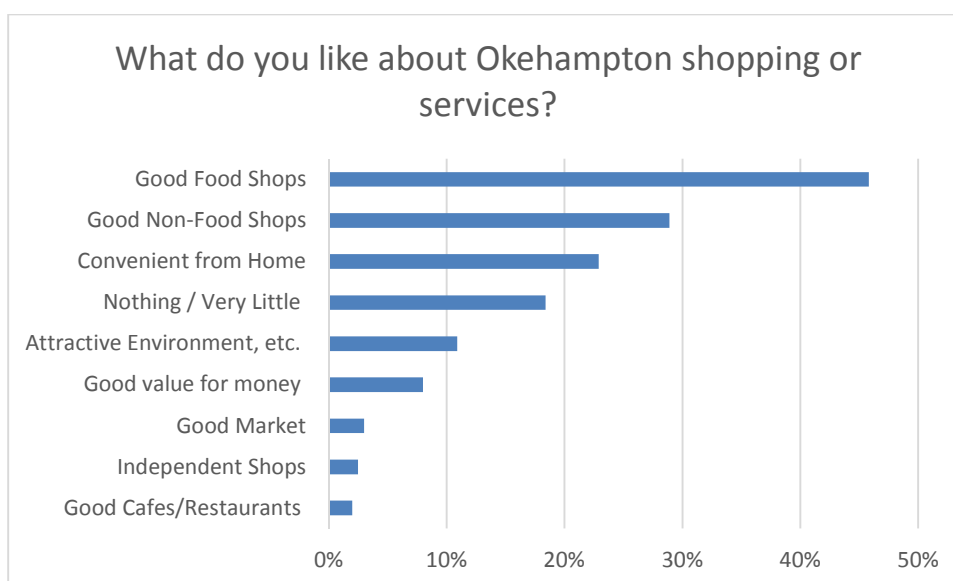
5.2.7 The level of vacancies in a town centre provides an indicator of local operator demand. Figure 5:1 shows that the vacancy rate in Okehampton is significantly lower than the national average, in terms of proportion of floorspace and units. There are a relatively higher proportion of vacant units compared to floorspace which demonstrates that vacancies are concentrated with small retail units. In total there were only 10 vacant units in Okehampton. The map enclosed at **Appendix H** identifies the locations of vacancies in the centre.

## Customer view's and behaviour

5.2.8 Street surveys conducted in 2012 collected over 200 interviews in Okehampton Town Centre. The survey helped to identify the behaviours, opinions and preferences of people who visited Okehampton for shopping, work, leisure and a range of other activities. This section provides a summary of the key findings from the surveys in terms of likes, dislikes and improvements of Okehampton Town Centre.

5.2.9 Interviewees were asked that they liked about Okehampton for shopping and services (question 11). As shown in Figure 5:2, significant proportion of respondents identified the choice of good food shops (45.8%); the choice of non-food shops (28.9%); and the convenience of Okehampton from home (22.9%).

**Figure 5:1 Main Attractions to Okehampton Town Centre**



5.2.10 When asked what particular dislikes they had about each centre for shopping and services, there appeared to be an overall satisfaction with the current provision of Okehampton, with 32.8% of respondents in Okehampton unable to identify anything they specifically disliked. Of the remainder, the main dislikes mentioned by people in Okehampton included the poor choice of shops generally (28.4) and fashion/variety shops in particular (7.5%); traffic congestion generally (14.5%); and high levels of traffic through the centre (13.4%). In terms of car parking, fewer respondents in Okehampton mentioned that it was difficult to park near the shops (8%) or that it was expensive (2.5%).

5.2.11 During the on-street surveys, when respondents were asked what improvements, if any, would make them visit the shops and services in Okehampton more frequently, the majority of respondents (30.8%) did not identify any improvements. Of the remainder, the improvements most frequently mentioned comprised more/better parking (13.4%); more clothes shops (8.5%); better access for cars (5.5%); better public transport (5%); more chain stores (4%); and more traffic free pedestrian areas (4%).

### Evidence of tourism

5.2.12 Okehampton town centre contains some limited visitor facilities serving the local tourist market. In common with Totnes, the town benefits from close proximity to the Dartmoor National Park which is located just over 1 km south of the town. Other tourist attractions in the local area include Okehampton Castle. The town centre provides limited visitor accommodation. There is one hotel; the recently redeveloped White Hart public house operated by JD Weatherspoon's. The Fountain Inn public house also provides visitor accommodation. The majority of visitor accommodation in the local area is provided by guest houses, B&B's and holiday lets.

5.2.13 The town centre has a good number of cafes and pubs which serve the local tourist market although there is only one restaurant. Okehampton contains the Museum of Dartmoor Life and visitor centre which provide information about the Dartmoor National Park and other local attractions.

### Commercial rents

5.2.14 The level of rent that businesses are prepared to pay for retail space in a centre provides an indication of its relative strength as a shopping location. Table 5:2 shows the average asking rents for retail premises in Okehampton recorded by Co-Star between 2011 and 2016. According to Co-Star, asking rents in Okehampton over the past five years have fluctuated from £13 to £21 per sqft with a general trend of rents steadily increasing since 2013 from a low of £10 per sqft up to £21 per sq ft in 2016. This data suggests that demand for retail space has increased over the period.

Figure 5:2 Okehampton asking rents 2011-2016



Source: Co-Star (2016)

5.2.15 Rents in Okehampton are relatively low compared to Tavistock where, over the same period, rents varied between £12 and £26 per sqft. This is not surprising considering that Tavistock is the larger of the two town centres in WDBC with a greater number of national multiples.

### **Retailer representation**

5.2.16 The level of retailer demand provides further indication of the market strength of a centre. There are currently no published retailer requirements for Okehampton available from Shop Property. Shop property is an online resource which publishes property requirements for retailer and leisure operators (Class A3-A5) in both town centre and out of town locations across the UK.

5.2.17 Published requirements do not however provide a complete picture of retailer demand and it should not be understood to mean that there is no retailer demand in Okehampton. The lack of published retailer requirements may be attributable to the fact that this resource is mainly used by national retailers and the decreasing use of this resource by retailers generally. This reflects the nature of retail provision in Okehampton which is comprised of mainly independent retailers and fewer national multiples. Okehampton also has low recorded vacancy levels by national standards which indicate that there is strong local demand for retail units.

### **Accessibility and pedestrian flows**

5.2.18 Accessibility in to Okehampton via public transport modes is limited which reflects the rural and sparsely populated nature of the local area. The rail service between Okehampton and Exeter only runs in the summer months which is replaced by a bus service in the winter. The local bus services to the connecting village centres are relatively infrequent. For example, the bus from Okehampton to Hatherleigh only runs every 6 times a day (Monday – Saturday). During the site visit PBA did not identify any cycling infrastructure in the town centre to encourage cyclists.

5.2.19 Residents are therefore highly reliant on private car to access the town centre and as a result the town experiences high levels of congestion during peak hours. A key source of this congestion is cars accessing the town centre supermarkets and leisure centre off Market Street in the north of the town. PBA are aware that the Council have previously undertaken consultation on this issue with local residents'. Okehampton town centre is relatively well served by four car parks with together provide 255 spaces. The town centre itself is relatively accessible for pedestrians. The Red Lion Yard is fully pedestrianised and overall the centre provides a pleasant shopping environment.

### **Perception of safety and occurrence of crime**

5.2.20 The majority of shopping streets provided active frontages which creates a positive perception of town centre safety and would deter potential crime. However, there are certain parts of the town which do not benefit from natural surveillance (Market Street, School Way and St James Street) where there is greater potential for crime.

5.2.21 Figures obtained from national police statistics reveal that shoplifting accounted for 13.74% of crime reported between 30th September 2015 and 1st October 2016. Antisocial behaviour accounted for 30% of crime reported in during this period<sup>11</sup>.

### Environmental quality

5.2.22 The town centre property offer is mainly comprised of small traditional shop units located along Fore Street, the Red Lion Yard and The Arcade which are located directly off Fore Street. More modern additions to the town centre property stock include the three large food stores located off Market Street / School Way. The pedestrianised Red Lion Yard provides a pleasant shopping location with plenty of outdoor seating and planting. St James Church located at the southern end of Fore Street provides a pleasant area of public realm with seating and attractive corner feature buildings. The town centre environmental quality is of a good standard throughout with no evidence of littering or vandalism.

### Summary

5.2.23 Okehampton has a strong convenience offer for a town of its size with three national multiple supermarket operators present in the centre (Waitrose, Lidl and Co-op). However, there is a more limited range of small independent food stores (such as bakeries, butchers and health food shops) compared to Tavistock. The supermarkets generally enhance the viability of the town by attracting visitors and generating footfall although they also create high volumes of traffic which leads to congestion during peak periods.

5.2.24 The town provides a strong independent comparison retail offer with almost all GOAD comparison sub-categories represented to some extent. Okehampton contains the boroughs only cinema and a number of visitor attractions (Dartmoor museum and visitor centre), although there is scope to improve the choice of victor accommodation in the town centre. Whilst the centre provides a good range of cafes and pubs, there is scope to improve the quality and diversity of the food and beverage offer by increasing the number of restaurants.

5.2.25 The town centre generally provides a pleasant and safe environment for visitors. The topography of the area and the East and West Okement rivers running through the town enhance the environment.

5.2.26 The SWOT analysis presented in Figure 5:3 summarises the main strengths, weaknesses, opportunities and threats of Okehampton town centre.

**Figure 5:3 SWOT analysis of Okehampton town centre**

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Good range of leisure facilities and comparison shops</li> <li>• Low and stable vacancy rate</li> <li>• Diverse convenience shopping offer which attracts shoppers into the town</li> </ul>	<ul style="list-style-type: none"> <li>• There is limited choice of visitor accommodation in the town centre</li> <li>• The town centre property offer is limited and mostly comprised of very small units</li> </ul>

<sup>11</sup> <https://www.police.uk/devon-and-cornwall/DEV.4016/crime/stats/>



	<ul style="list-style-type: none"> <li>Fore Street and Market Street experience high levels of traffic at peak times which detracts from the environmental quality</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>Leisure facilities could be enhanced further with an improved restaurant offer to enhance the evening economy</li> <li>Increasing the range and quality of leisure facilities including visitor accommodation in the centre could attract more tourists</li> <li>Increasing the amount and choice of visitor accommodation in the town centre could bring additional spending into the town centre and improve the evening economy</li> </ul>	<ul style="list-style-type: none"> <li>Demand from national convenience operators to open new out of centre stores</li> <li>Limited choice of non-food shops, particularly fashion, compared to larger competing centres</li> <li>Small units in the town centre limit its ability to attract multiples retailers</li> </ul>

### 5.3 Tavistock

5.3.1 Tavistock is the largest town centre in WDBC with 224 units. The centre is located in the west of WDBC and 1.5km east of the Dartmoor National Park. The town centre is also characterised by a traditional linear layout; retail units are concentrated along West Street, Brook Street and Duke Street. The indoor Panier Market is located directly south of Duke Street which hosts a variety of themed markets up to 5 times per week. The town centre property stock is predominantly comprised of small retail units which reflects the historic character of the town. The Co-op supermarket on Brook Street is the most recent addition to the property stock which is also the largest retail unit in the town.

#### Diversity of uses

**Table 5:2 Tavistock diversity of uses compared to the national average**

Use	Tavistock units %	UK units average %	Tavistock sqm %	UK sqm average %
Convenience Goods	11.0	9.3	17.3	18.4
Comparison Goods	46.8	39.7	44.5	44.9
Food and Drink	15.1	17.1	17.3	12.7
Service Retailers	16.5	20.6	12.5	12.8
Miscellaneous	1.4	1.9	1.7	1.0
Vacant Units	9.2	12.2	6.6	10.2

Source: Experian GOAD and PBA (2016)

5.3.2 Table 5:2 compares the proportion of different types of units found in Tavistock, and their floorspace, against the national average figures to provide an indication of under

provision or over provision of certain uses. The map enclosed at Appendix H shows the distribution of uses throughout the centre

- 5.3.3 Tavistock contains 5 of the current 28 GOAD key attractors which is positive for a centre of its size. The key attractors present include Boots and four other comparison retailers (Clintons, New Look, Carphone Warehouse and WH Smith) which indicates that the centre plays a greater role than Okehampton in meeting the comparison needs of the boroughs residents.

### **Convenience goods**

- 5.3.4 Table 5:2 Tavistock diversity of uses compared to the national average shows a healthy supply of convenience goods in Tavistock, both in the number of units and amount of floorspace. Whilst the number of units is marginally above the national average, the amount of floorspace is below the national average. This trend demonstrates an inclination towards smaller convenience unit sizes in Tavistock.
- 5.3.5 The national multiple convenience offer in Tavistock comprises a large Co-op supermarket at the edge of the key retail area, and smaller Co-op store near the centre of the town. Traditional specialist convenience operators such as bakeries, butchers and green grocers are also prevalent throughout the centre, demonstrating a sizeable demand for local produce. There are also a number of health food stores, including a Holland and Barret, and independent delicatessens. Notably, there are no off licenses within the GOAD study area.
- 5.3.6 The convenience retailer offer in Tavistock is complemented by Pannier Market, an indoor market which runs the Traditional Charter Market every Friday, selling fresh produce including meats, fish, fruits and vegetables. During the summer months, outdoor Farmers Markets take place in Bedford Square every other Saturday.

### **Comparison goods**

- 5.3.7 Table 5:2 Tavistock diversity of uses compared to the national average shows there to be an over representation of comparison goods retailers in Tavistock compared to national averages. This is evident both in the representation of units (47% in Tavistock compared to 40% nationally), and representation of floorspace (43% compared to 45% nationally).
- 5.3.8 The comparison goods offer provided by national multiples comprises approximately 26% of the total convenience floorspace in the GOAD study area, including New Look, White Stuff, W.H Smith, Boots and Oxfam.
- 5.3.9 Tavistock has a healthy representation of clothing stores, however these are more catered towards the 'Women's, girls and children's' and 'Mixed categories'. The clothing offer is aimed towards the mid-range market, with a variety of both national multiples and independent operators and boutiques.
- 5.3.10 There is a particularly strong representation of 'Gifts, china, glass and leather goods' and 'Books, arts, crafts and stationary' operators in Tavistock. This may in part be stimulated by a tourism driven demand for these goods. In contrast, there is a slight under representation of 'Furniture, carpets and textiles', 'Electricals and home entertainment' and 'Cars, motorcycles and accessories' categories.

### **Service operators**

- 5.3.11 Table 5:2 Tavistock diversity of uses compared to the national average shows that non-food service operators are underrepresented in Tavistock. This is more prevalent in the representation of units (17% in Tavistock compared to 21% nationally), than in the representation of floorspace (13% compared to 13% nationally), indicating larger unit sizes within this category.
- 5.3.12 Tavistock falls slightly below national averages in its representation of A3 – A5 units (15% in Tavistock, 21% nationally) although it has a greater proportion of floorspace in this category compared to the national average (17% in Tavistock, 13% nationally), thus indicating an inclination towards larger A3 – A5 unit sizes. There is a good provision of A4 drinking establishments in Tavistock compared to Okehampton. However, these are largely comprised of public houses and may be less popular with younger residents.
- 5.3.13 The Tavistock Canal area provides most of the town centres D2 leisure provision including a leisure centre and Tavistock Wharf arts and entertainment venue which provides a cinema and an art gallery as well as hosting regular live music events and theatre performances. Tavistock Wharf is a popular destination with local residents which also attracts visitors from across the sub-region.

### Proportion of vacant property

- 5.3.14 Table 5:2 Tavistock diversity of uses compared to the national average shows that the vacancy rate for ground floor town centre properties is low compared to the national average term of units (10% in Tavistock, compared to 12% nationally) and floorspace (6%% in Tavistock, compared to 10% nationally). In total there were 20 vacant ground floor units at the time the PBA GOAD update was undertaken in October 2016. The number of vacancies has increased since 2012 when 11 vacant units recorded by the previous retail study.
- 5.3.15 Vacancies are equally distributed throughout the town centre, with the exception of the Market, where there was a cluster of four vacant units, including three consecutive vacant units. This is unsurprising given the secluded location, and small size of these units.

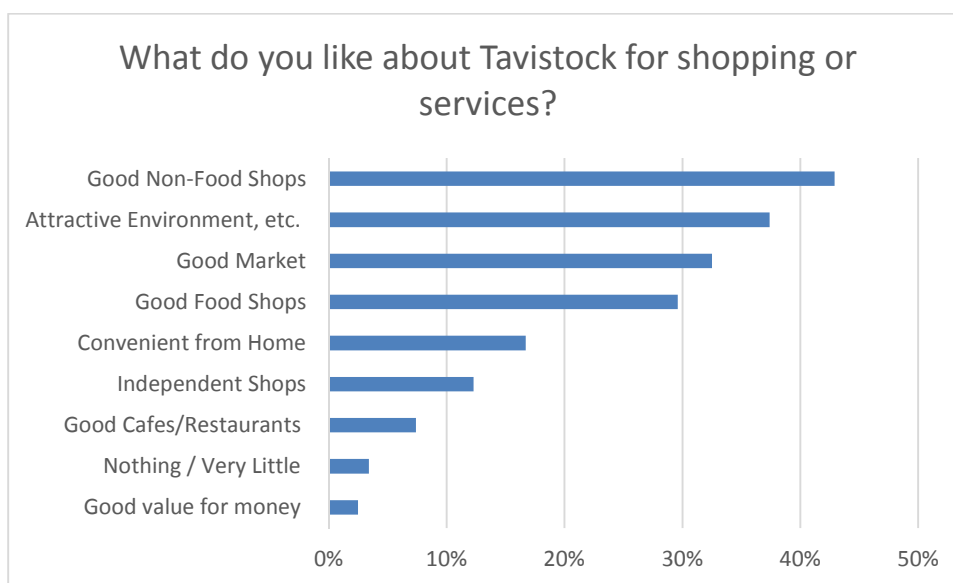
### Customer view's and behaviour

- 5.3.16 Street surveys conducted in 2012 collected over 200 interviews in Tavistock Town Centre. The survey helped to identify the behaviours, opinions and preferences of people who visited Tavistock for shopping, work, leisure and a range of other activities. This section provides a summary of the key findings from the surveys in terms of likes, dislikes and improvements of Tavistock Town Centre.
- 5.3.17 Interviewees were asked that they liked about Tavistock for shopping and services. As shown in Figure 5.6 below, a significant proportion of respondents identified the range and choice of non-food goods (42.9%); the attractive environment (37.4%); the market (32.5%); food shops (29.6%); the convenience to home (16.7%); and the range of independent shops (12.3%).
- 5.3.18 When asked what particular dislikes they had about each centre for shopping and services, there appeared to be an overall satisfaction with the current provision of Tavistock, with 58.1% in Tavistock unable to identify anything they specifically disliked. Of the remainder, the main disliked mentioned by people in Tavistock included difficult to park near shops (12.8%); poor range of shops (9.9%); expensive

car parking (6.4%); and insufficient car parking (3%). Overall shoppers appear dissatisfied with the location, cost and choice of car parking in the town centre.

- 5.3.19 During the on-street surveys, when respondents were asked what improvements, if any, would make them visit the shops and services in Tavistock more frequently, the majority of respondents (41%) did not identify any improvements. Of the remainder, the improvements most frequently mentioned comprised more/better parking (17.2%); more traffic free pedestrian areas (5.9%); more clothes shops (4%); better public transport (3%); and cheaper/free parking (3.4%).

**Figure 5:4 Main attractions to Tavistock Town Centre**



### Evidence of tourism

- 5.3.20 Tavistock is evidently an attractive destination for tourists. This is demonstrated in the variety of facilities and amenities targeted towards a tourist and visitor market. The Tourism Information Centre and Tavistock Museum are both located in the historic Court Gate, are likely to be popular with tourists. The variety of historical buildings in the town centre, such as St. Eustachius Church, Court Gate and Guildhall, is also expected to attract tourist interest.

- 5.3.21 The Pannier Market is also likely to be a popular destination, attracting residents and visitors from a wide catchment area. The variety of shops around the main town centre also indicates a strong tourism market. These include gift shops and operators selling locally sourced produce such as ice cream, fudge and pasties. There are also a collection of hotel and guest houses in the town centre, including The Bedford Hotel, Browns Hotel and Rockmount Lodge.

### Commercial rents

- 5.3.22 The level of rent that businesses are prepared to pay for retail space in a centre provides an indication of its relative strength as a shopping location. Table 5:5 shows the average asking rents for retail premises in Tavistock recorded by Co-Star between 2011 and 2016. According to Co-Star, asking rents in Tavistock over the past five years have fluctuated between £21 and £26 per sqft. Following decreasing

rents throughout 2015, asking rents have recently increased again, reaching approximately £23.50 in Q4 2016.

- 5.3.23 Rents in Tavistock are relatively high compared to Okehampton where, over the same period, rents varied between £9 and £21 per sqft. This is not surprising considering that Tavistock is the larger of the two town centres in WDBC with a greater number of national multiples.

**Figure 5:5 Tavistock asking rents per sqft (2011-2016)**



Source: CoStar (2016)

### Retailer requirements

- 5.3.24 The level of operator demand provides an important indication of the health of a centre. As shown in Table 5.1, there is just one published requirement for Tavistock according to Shop Property. This is Marston's Plc, a British brewery and pub operator, which operates family gastro pubs across the UK. Tavistock provides some larger units although the stock is fairly limited and therefore the scope to accommodate Marston's at the upper end of the floorspace range is considered to be minimal. There is greater potential to accommodate Marston's at the lower end of the floorspace range.

**Table 5:3 Tavistock Retailer Requirements**

Operator	Class	Max (sqm)	Min (sqm)
Marston's Plc	All	836	464

Source: Shop Property (2016)

### Accessibility and pedestrian flows

- 5.3.25 Pedestrian accessibility around Tavistock is facilitated by sign posts which makes the centre easy to navigate, and is well sign-posted. The pavement quality throughout the town centre is of a high quality; however, these do become narrow in some of the centre's smaller streets. Accessibility is enhanced by pedestrian crossings and traffic is calmed along the main retail streets by the use of speed bumps. Overall, there does not appear to be any significant cause for conflict between road users.

- 5.3.26 Tavistock town centre is limited in provision of car parking provision. Off-street parking facilities are available at Abbey Place (c.30 spaces), Garden Lane (c. 50 spaces), Market Street (c. 10 spaces) and Co-op supermarket (c. 114 spaces). There is extra capacity accommodating at on-street parking provision, however this is not considered sufficient to accommodate the shortfall of off-street provision.
- 5.3.27 The town centre is accessible via a local bus network. However, Tavistock does not have a train station which means that many tourists and visitors are reliant on car or bus travel, thus placing further strain on parking provision. In terms of vehicle access, Tavistock is fairly accessible, due to its proximity to key roads such as the A390 and A386. There is some cycle infrastructure; cycle parking racks are located on some of the centres wider pavements although there is a noticeable lack of cycle lanes.

### Perception of safety and occurrence of crime

- 5.3.28 Tavistock provides a good sense of safety in the town centre. The main routes have active frontages which provide natural surveillance. Some of the narrower streets off the main shopping frontages are not fitted with street lighting, which may contribute to a poor sense of safety. However, these are generally overlooked by residential properties and unlikely to be considered as 'no-go' areas. Figures obtained from national police statistics reveal that shoplifting accounted for 4% of crime reported between 30th September 2015 and 1st October 2016. Antisocial behaviour accounted for 37% of crime reported in during this period<sup>12</sup>.

### Environmental quality

- 5.3.29 The environmental quality in Tavistock is very good overall. This is achieved by a high quality attractive built form. The town has a strong provision of well-maintained historic buildings, particularly clustered around Bedford square and Abbey place. As such, much of the town centre is located within the Tavistock Conservation Area, and a number of prominent town centre buildings are listed for their historic value. These provide an attractive setting, and the notable use of slate and stone building provide a cohesive appearance in the street scape.
- 5.3.30 There is a good provision of street furniture in the town centre. Public benches are prevalent many of the main public areas and street signage is present throughout the town centre. The pavement quality is generally good, and despite the historic nature of the town, pavements are generally wide throughout. The town centre is also well maintained and clean, with minimal evidence of litter, graffiti or other eyesores.
- 5.3.31 Landscaping quality in Tavistock is generally high. There is some evidence of potted plants and hangings baskets along some of the key retail streets which provide an attractive setting; however, these could be more prevalent in other areas. The gardens and landscaping surrounding the Tavistock Parish Church provide an attractive green setting in the centre of the town.

### Summary

- 5.3.32 Tavistock is considered to perform well against NPPG indicators. As part of our assessment, we have assessed the number of vacant units in the centre, and compared it with the most recent Experian Goad Survey of the centre. As part of our

<sup>12</sup> <https://www.police.uk/devon-and-cornwall/DEV.4019/crime/stats/>

visit, we identified that vacancy levels of retailer units are very low (6%) particularly when compared to the national average (12%).

- 5.3.33 Convenience operators are well represented in Tavistock. The national multiple offer comprises a large Co-op supermarket, complemented by a small Co-op store in the town centre. There is also a strong representation of smaller specialist convenience retailers such as butchers, bakers, green grocers and delicatessen. Our analysis shows there to be an inclination within the convenience category towards smaller unit sizes. Pannier Market also provides complimentary convenience goods offer through weekly local produce markets.
- 5.3.34 Non-food service operators are slightly under represented in Tavistock, and there is prevalence towards larger unit sizes within this category. A3 – A5 operators are also slightly under represented and there is an opportunity to encourage further operators to build on the tourism and visitor economy. However, there is a good provision of A4 drinking establishments in Tavistock, which largely consists of public houses. There is an inadequate provision of D2 leisure facilities, such as cinemas and leisure centres, and further provision of such facilities could be encouraged.
- 5.3.35 Tavistock benefits from a high quality environment and public realm. The town centre is characterised by an attractive historic built form set in the Tavistock Conservation Area. The Pannier Market, historic buildings and attractive landscaping mean that Tavistock is a popular destination with tourists and visitors. The town centre is also well maintained and clean, with minimal evidence of litter, graffiti or other eyesores.
- 5.3.36 Pedestrian accessibility around the town centre is good although the off-street parking provision is limited and as such congestion in the town centre could be an issue particularly during peak seasons.
- 5.3.37 Figure 5:6 below provides a SWOT analysis which summarises the strengths, weaknesses, opportunities and threats of Tavistock town centre.

**Figure 5:6 SWOT Analysis of Tavistock Town Centre**

Strengths	Opportunities
<ul style="list-style-type: none"> <li>• High quality public realm and attractive street frontages</li> <li>• Historic architecture</li> <li>• Low vacancy rates</li> <li>• Popular tourism destination and benefits gained through tourist spending</li> </ul>	<ul style="list-style-type: none"> <li>• Maintain and enhance historic value of the town, to increase the attraction to tourists</li> <li>• Enhance D2 leisure facilities, particularly those targeted towards existing residents</li> <li>• Maintain and enhance the market area, and popular town markets to encourage further spending/visitation to the town centre</li> </ul>
Weaknesses	Threats
<ul style="list-style-type: none"> <li>• Poor provision of off-street parking facilities to accommodate need, particularly during peak seasons</li> </ul>	<ul style="list-style-type: none"> <li>• Visitors avoiding the centre due to inadequate parking facilities</li> </ul>

<ul style="list-style-type: none"> <li>• Observed overtrading by out-of-centre convenience retailers on Plymouth Road</li> <li>• Relatively poor provision of D2 leisure uses particularly targeted towards existing residents</li> </ul>	<ul style="list-style-type: none"> <li>• Spending leakage to out-of-centre convenience retailers Morrisons, Tesco &amp; Lidl on Plymouth Road</li> <li>• Failure to attract new residents and retain existing due to poor provision of leisure facilities for residents</li> </ul>
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## 5.4 Local centres

5.4.1 This section provides an assessment of the four local centres in WDBC. The focus of this assessment is to identify gaps in the provision of local retail facilities and opportunities to improve the retail offer. The audit provided in Table 5:4 includes a list of 17 shops, services and community uses which could be provided in a local centre. **Appendix E** contains a proportionate health check for each local centre and provides further details on the local context.

5.4.2 While the audit provides a useful indication of to what extent a centre is meeting the needs of local residents the results must be considered in the local context and a range of other factors need to be considered, as follows:

- the size a centre will restrict the number of shops and services each centre can offer;
- the proximity of other town centres, local centres and out of centre stores means that local need may already be met at an alternative location;
- the quality of the shopping centre or parade, in terms of its environment, type and range of retailers will affect how it is perceived and used by local residents; and,
- the relative accessibility of each centre will be an important factor in how local people use the local shops and services. For example, a lack of on-street car parking or poor local bus services may deter shoppers.

5.4.3 As shown in Table 5:4, Bere Alston is the most well served local centre and provides seven local facilities including a convenience store which suggests that some of residents' day to day needs are met with the centre. Hatherleigh provides six local facilities including a convenience store which suggests that some of residents' day to day needs are met locally. Hatherleigh is a pleasant centre with a number of attractive historic buildings and provides a visitor's centre, a local brewery and a country market and cattle market in addition to the facilities listed above.

5.4.4 North Tawton provides five local facilities including a Spar convenience store which suggests that some of residents' day to day needs are met locally. North Tawton is the only local centre which comprises a dentist. Lifton has just three local facilities with the noticeable absence of a convenience store which suggests that most of residents local shopping needs are not met locally. In addition to the facilities listed in Table 5:4 the centre contains a specialist shooting and gun repairs shop and a hotel and a new community centre was under construction on Fore Street at the time of PBA's site visits.

**Table 5:4 WDBC local centres local needs index**



Category	North Tawton	Hatherleigh	Lifton	Bere Alston
Convenience food store	X	X		X
Bank				
Post office	X	X	X	X
Newsagent		X		X
Off licence				
Takeaway, café or restaurant	X	X	X	X
Public house		X	X	X
Bookmakers				
Laundrette/dry cleaners				
Hairdressers/ beauty salon	X			X
Florist				
Estate agents				X
Community hall		X		
Doctor's surgery				
Library				
Chemist				
Dentists	X			
<b>Score</b>	<b>5</b>	<b>6</b>	<b>3</b>	<b>7</b>

Source: PBA site visits (October 2016)

## 5.5 Out of centre

- 5.5.1 Out of centre retail warehouse units, convenience superstores, garden centres and specialist food shops all compete with the boroughs centres for retail expenditure. summarises WDBC out of centre retail offer. The existing out of centre retail offer in WDBC is summarised in Table 5:5.
- 5.5.2 The out of centre retail offer in WDBC is concentrated around a stretch of Plymouth Road (The A386) approximately 1.2km south east of Tavistock town centre. The retail offer provides three large out centre supermarkets (Lidl, Morrisons and Tesco) which provide shoppers with a good choice of convenience products. There are a number of independent retailers located around the West Devon Business Park including a specialist country store. The business park contains a couple of stores selling traditional bulky goods (pets, DIY, hardware, furniture, electronics and appliances) although these stores are small compared to competing retail parks in Plymouth and Torquay.

**Table 5:5 WDBC out of centre floorspace**

Centre	Location	Store /facility
Tavistock	Plymouth Road	Lidl, Morrisons, Tesco
	West Devon Business Park	Patch & Acre country store
	West Devon Business Park	Atlas House: Tavistock Carpets, Dartmoor Cycles, Ron's Pet Supplies

5.5.3 WDBC provides a very limited bulky retail goods offer and the nearest out of centre retail parks are located to the west of the borough at Coypool Road, Plympton and Marsh Mills Retail Park, Plymouth. Marsh Mills Retail Park is easily accessible from WDBC by car via the A386 and contains several national multiple retailers which provide shoppers with a wide range of bulky goods. As such it is expected that Marsh Mills will draw a significant amount of expenditure from WDBC.

## 5.6 Key findings

This report has found that each of WDBC town centres perform well against the NPPG health check indicators. The key drivers of town centre vitality and viability are local affluence and tourism. A brief overview of the WDBC retail hierarchy is set out below:

- Tavistock is the largest town centre with 224 units. The centre provides a pleasant environment for visitors and the townscape is enhanced by attractive historic buildings and a riverside location. The centre is located in close proximity to the Dartmoor National Park and provides a range of tourist facilities and attractions. The town contains a range of markets hosted in the Panier Market and Bedford Square. The leisure offer is somewhat limited and there is a noticeable absence of cinemas and theatres. The convenience offer is more limited than Okehampton owing to the fact that there is a significant out of centre retail offer south of Tavistock.
- Okehampton is the smaller of the boroughs two town centres with just 127 units. The centre provides a pleasant environment for visitors and the townscape is enhanced by its riverside location. The centre has a strong convenience offer with three national multiple supermarket operators present and a good range of independent comparison retailers. The town is located in close proximity to the Dartmoor National Park and clearly benefits from tourist trade, although tourist facilities could be expanded. Okehampton contains the boroughs only cinema which provides 2 screens.

WDBC contains a network of four local centres which play an important role in providing local top-up shopping and community facilities. WDBC has a relatively limited out of centre retail offer which is concentrated along Plymouth Road to the south of Tavistock and includes three national multiple supermarkets and a number of independent operators selling a range of bulky goods items including pets, cycles, carpets and textiles as well as a specialist farm supply store.

Exeter and Plymouth are both popular destinations for residents living in WDBC and as such compete, although not directly, with WDBC centres for footfall and expenditure. As regional shopping destinations Exeter and Plymouth perform a different role to the town centres and the concentration of national retailers and leisure facilities attracts spending from a wide catchment area. Plymouth and Torquay contain a significant out of centre retail offer which are also popular with residents in the study area.

## 6 Spending patterns

### 6.1 Introduction

- 6.1.1 This section sets out where residents in SHDC and WDBC are undertaking their spending on convenience (food) and comparison (non-food) and on leisure activities. It first sets out the study area used for each authority and the survey base, and then assesses the extent of growth in spending on retail goods and leisure activities expected to come forward over the course of the study period. Once this is established, using the survey data available, it is possible to calculate how much spending is undertaken in each centre in each authority and how much 'leaks' to destinations further afield.
- 6.1.2 As explained in Section 1, the quantitative calculations have been undertaken separately for SHDC and WDBC due to the different surveys used. At **Appendix I** and **Appendix J**, we attach the capacity tables and we refer to the relevant tables in the appendices within this section. We also refer to the data in subsequent sections 7, 8 and 9.

### 6.2 Study area and survey base

#### South Hams District Council

- 6.2.1 The study area used to assess spending patterns in SHDC is provided at **Appendix A**. The district was sub-divided in order to get an accurate indication of spending patterns for residents in different parts of the district. It shows a total of eight survey zones, as follows:
- Zone 1 — Ivybridge
  - Zone 2 — Ermington, Modbury and Ugborough
  - Zone 3 — Lee Mill
  - Zone 4 — Plympton & Plymstock
  - Zone 5 — South Brent and Halwell
  - Zone 6 — Kingsbridge and Salcombe
  - Zone 7 — Dartmouth
  - Zone 8 — Totnes and Dartington.
- 6.2.2 Results from a bespoke telephone survey of households undertaken by NEMS Market Research in March/April 2013 are used to understand the patterns of retail spending in the study area. The full weighted market shares are attached at **Appendix K**.

6.2.3 In summary, the approach was as follows:

- Completed surveys were obtained from 1,000 households in eight defined zones across SHDC and parts of PCC and WDBC
- Questions were asked on convenience (food and grocery shopping), comparison (non-food shopping) and on commercial leisure uses
- Weightings are applied to the answers to achieve a composite market share for spending on the convenience goods and comparison goods sectors
- The market share outputs are converted to a monetary value in 2013 by applying the study area resident expenditure to the percentage market shares. This exercise enables an understanding of where residents of the study area were spending their money in 2013.

6.2.4 Due to the date of the survey being 2013, the base year of the quantitative analysis is also 2013. However, the most up-to-date expenditure and population data has been used to ensure that the quantitative analysis is robust.

### West Devon Borough Council

6.2.5 A similar approach has been undertaken for WDBC, which utilises the study area used in the TCRS. The study area is attached at **Appendix B** and this shows 10 zones which extend across the WDBC administrative area and beyond into neighbouring local authorities. Therefore, there is a degree of overlap in the study area used for SHDC. However, because the quantitative exercises are undertaken separately, this overlap has no bearing on the results.

6.2.6 In the quantitative analysis within the TCRS, the market shares for the zones were combined into three; namely a Tavistock 'Core' Catchment Area (TCCA) at zones 1-3, an Okehampton 'Core' Catchment Area (OCCA) at zones 4-7 and an outer Catchment Area (OCA) Zones 8-10.

6.2.7 Across this study area, the results from a household survey undertaken in 2011 have been used to establish shopping patterns. It is recognised that this is some five years old. However, due to the need for a proportionate evidence base for the Joint Local Plan, this survey base has been utilised and the one main change in shopping provision since this date (i.e. the Tesco in Tavistock) has been taken into account.

6.2.8 Due to the survey being undertaken in 2011, the base year of the quantitative analysis is also in 2011, with updated population and expenditure inputs used. It should be noted that this is two years before the equivalent base year used for SHDC.

## 6.3 Population and expenditure growth

6.3.1 The data on spending patterns can be found in Tables 1-10 in **Appendices M and N**. This follows a standard step by step approach, by first calculating existing expenditure in 2013/2011 and then distributing this spending to destinations based on the results from the telephone household survey. As part of this exercise, expenditure growth is also forecast from 2016 to 2034.

- 6.3.2 Base population data has been obtained from Experian MMG3 database for the study areas used for the respective authorities. Using the Devon County Council 10-year migration trend population projection growth rates, this data has then been provided in 2013/2011 and then 2016, 2021, 2026 and 2034. It should be noted that because there is a degree of overlap in the study areas used, the growth should not be added together. However, due to the application of market shares to these spending patterns, this does not influence the results. Noting the different base years, the population growth is summarised below at Table 6.1

**Table 6:1 Population growth**

Year	SHDC	WDBC
2011/13	136,881	104,369
2016	138,331	106,844
2021	140,121	110,533
2026	141,550	113,751
2034	142,512	117,356
2011/13-26	4,669	9,382
2011/13-34	4,182	10,512

Source: Table 1, Appendix I & J

- 6.3.3 The 10-year trend projection is considered to best reflect the longer term patterns of growth across the housing market area and particularly the aspirational growth of Plymouth, and so be a robust predictor of continued housing growth over the plan period. The rate of population growth is sharper in WDBC than SHDC, largely because there has been far more housing built in WDBC over the last 10 years, especially compared with SHDC, which has not delivered at the expected rate, to some extent because Sherford has been delayed.
- 6.3.4 Turning to expenditure, per capita expenditure base data is supplied by Experian MMG3 on a zonal basis for the retail and leisure sectors, projected forward using the inputs described in Section 3. This per capita expenditure is then applied to the base expenditure data to calculate total annual expenditure. For the retail sectors, special forms of trading (SFT), i.e. the Internet, is deducted so that only expenditure on 'bricks and mortar' is used. The expenditure growth is summarised at Table 6.2.

**Table 6:2 Expenditure growth**

Year	SHDC (£m)			WDBC (£m)		
	Comp	Conv	Leisure	Comp	Conv	Leisure
2011/13	400.7	321.7	292.7	283.8	248.0	241.9
2016	461.1	316.0	311.7	340.0	244.1	270.0
2021	508.2	310.8	330.5	382.8	239.1	283.8
2026	595.1	312.6	358.3	456.6	245.0	313.4
2034	767.2	315.3	406.4	603.2	253.2	364.2
2011/13-26	194.4	-9.1	63.4	172.8	-3.0	69.4
2011/13-34	366.5	-6.4	103.0	319.4	5.2	112.3

Source: Table 1, Appendix I & J

- 6.3.5 The highest rate of growth is in the comparison goods retail sector, following by the leisure sector (all categories in aggregate). The growth rates in the convenience sector is limited. This point, combined with the allowances for SFT means that there is very little expenditure growth in this sector. The implications for this growth from a quantitative need perspective is considered in subsequent sections.
- 6.3.6 The next stage of the exercise is to consider where the spending is undertaken in the base year. Given the date of the surveys, a degree of caution should be applied to the patterns of expenditure. However, they represent the best available data at this level of geography, as explained at Section 1. The spending patterns are described separately for SHDC and WDBC.

## 6.4 Spending patterns

### South Hams District Council

- 6.4.1 The survey undertaken in 2013 is combined with the expenditure data in order to understand spending patterns within the study area at 2013. The data is amalgamated at Tables 5 to 10, **Appendix I** and cover the comparison and convenience sectors, as well as the food and beverage leisure sector. This mean the market shares of each of the main towns, as well as other destinations, can be calculated. The data for the comparison sector is summarised below at Table 6:3.

Table 6:3 SHDC comparison spending patterns in 2013

Destination	Turnover from study area	Market share from study area
Dartmouth	10.9	2.7%
Ivybridge	12.1	3.0%
Kingsbridge	31.2	7.8%
Totnes	20.6	5.2%
Local Centres	2.2	0.5%
Other SHDC (incl. villages)	14.6	3.6%
Out of Centre SHDC	3.7	0.9%
Other Destinations (Study Area)	11.3	2.8%
Plymouth	186.9	46.6%
All Other Destinations	107.1	26.7%
<b>Total</b>	<b>400.7</b>	<b>100.0%</b>
<b>Total SHDC Destinations</b>	<b>95.4</b>	<b>23.8%</b>
<b>Total Study Area (Zones 1-8)</b>	<b>106.7</b>	<b>26.6%</b>

Source: Table 5,6, Appendix I

- 6.4.2 The highest comparison goods market share of SHDC centres is for Kingsbridge followed by Totnes. There are significant levels of expenditure leakage to Plymouth, representing just less than 50% of the total expenditure of the study area. The total SHDC market share is shown in the penultimate row above.
- 6.4.3 The equivalent exercise is undertaken for convenience goods in the table below.

**Table 6:4 SHDC convenience spending patterns in 2013**

<b>Destination</b>	<b>Store</b>	<b>Turnover from SA</b>	<b>Market share from SA</b>
Dartmouth town centre	Other shops	5.3	1.7%
Dartmouth out of centre	Lidl, Townstal Road	4.2	1.3%
Dartmouth out of centre	Sainsbury's, Nelson Road	14.5	4.5%
Ivybridge town centre	Co-op, Glanville Mill	6.3	1.9%
Ivybridge town centre	Local shops	3.4	1.0%
Ivybridge out of centre	Other shops	1.8	0.6%
Kingsbridge town centre	Other shops	3.9	1.2%
Kingsbridge out of centre	Morrisons, Redford Meadow	24.7	7.7%
Kingsbridge out of centre	Tesco, Cookworthy Road	14.7	4.6%
Totnes town centre	Morrisons, Coronation Road	20.4	6.3%
Totnes town centre	Local shops	4.7	1.5%
Local Centres	Other shops	2.4	0.8%
Other SHDC (incl. villages)	Other shops	11.3	3.5%
Out of Centre SHDC	Other shops	0.3	0.1%
Out of Centre SHDC	Tesco, Lee Mill Industrial Estate	67.7	21.1%
Other Destinations (Study Area)	Other shops	76.1	23.7%
Plymouth	Other shops	14.0	4.4%
All Other Destinations	Other shops	45.9	14.3%
<b>Total</b>		<b>321.7</b>	<b>100.0%</b>
<b>Total SHDC Destinations</b>		<b>185.6</b>	<b>57.7%</b>
<b>Total Study Area (Zones 1-8)</b>		<b>261.8</b>	<b>81.4%</b>

Source: Table 5,6, Appendix I

- 6.4.4 As expected, the spending patterns are dominated by the larger foodstores with the Tesco at Lee Mill Industrial Estate achieving the highest turnover, and indeed market share, across the district. This is followed by the two Morrisons stores on the edge of Kingsbridge and Totnes town centre.
- 6.4.5 The levels of expenditure leakage are much lower than within the comparison sector, with the SHDC market share on the penultimate row in the above table. However, it should be noted that the study area market share is higher at over 80%, demonstrating a degree of sustainability across the wider area.
- 6.4.6 As well the retail sectors, it is possible to calculate spending patterns data on the food and beverage sector. However, this data is much more broad brush since it encompasses a wide range of A3, A4 and A5 food and drink uses. The spending data is presented at Table 6.5.



Table 6:5 SHDC food and beverage patterns in 2013

Destination	Turnover from study area	Market share from study area
Dartmouth	8.9	5.9%
Ivybridge	10.4	6.9%
Kingsbridge	16.7	11.1%
Totnes	13.1	8.7%
Local Centres	6.8	4.5%
Other SHDC (incl. villages)	14.7	9.7%
Out of Centre SHDC	4.9	3.2%
Other Destinations (Study Area)	14.3	9.5%
Exeter	0.6	0.4%
Plymouth	48.2	31.9%
Torquay	1.0	0.7%
All Other Destinations	11.5	7.6%
<b>Total</b>	<b>151.0</b>	<b>100.0%</b>
<b>Total SHDC Destinations</b>	<b>75.4</b>	<b>50.0%</b>
<b>Total Study Area (Zones 1-8)</b>	<b>89.7</b>	<b>59.4%</b>

Source: Table 9,10, Appendix I

- 6.4.7 The spending patterns indicate that about half of the food and beverage turnover is retained within the district. The main leakage destination is Plymouth, as expected. The four main centres in the district are achieving turnover in this sector, with Kingsbridge achieving the highest market share, followed by Totnes.

### West Devon Borough Council

- 6.4.8 The TCRS includes a detailed description of spending patterns across WDBC in 2011 and therefore they are not repeated here, since no new household survey has been undertaken. However, the data has been presented in the same way as it has for SHDC for consistency. Table 6.6 and Table 6.7 on the next page present the comparison and convenience spending patterns in 2011.

Table 6:6 WDBC comparison spending patterns in 2011

Destination	Turnover from study area	Market share from study area
Tavistock Town Centre	40.8	14.4%
Tavistock Out of Centre	3.4	1.2%
Okehampton Town Centre	14.9	5.2%
Okehampton Out of Centre	0.5	0.2%
Local Centres	1.3	0.5%
Villages	2.7	1.0%
Other WDBC	0.0	0.0%
Other Destinations (Study Area)	32.2	11.4%
Exeter	68.3	24.1%
Plymouth	76.5	27.0%
All Other Destinations	43.2	15.2%
<b>Total</b>	<b>283.8</b>	<b>100.0%</b>
<b>Total WDBC Destinations</b>	<b>63.6</b>	<b>22.4%</b>
<b>Total Study Area (Zones 1-10)</b>	<b>95.9</b>	<b>33.8%</b>

Source: Table 5,6, Appendix J

Table 6:7 WDBC convenience spending patterns in 2011

Destination	Turnover from study area	Market share from study area
Co-op, Brook Street, Tavistock Town Centre	5.1	2.1%
Co-op, Market Street, Tavistock Town Centre	2.6	1.1%
Other, Tavistock Town Centre	7.3	2.9%
Co-op, Market Street, Okehampton Town Centre	6.9	2.8%
Waitrose, School Way, Okehampton Town Centre	21.3	8.6%
Lidl, School Way, Okehampton Town Centre	7.6	3.1%
Other, Okehampton Town Centre	1.9	0.8%
Local Centres and Villages	20.8	8.4%
Lidl, Plymouth Road, Tavistock (OOC)	3.7	1.5%
Morrisons, Plymouth Road, Tavistock (OOC)	35.2	14.2%
Other Destinations (Study Area)	54.1	21.8%
All Other Destinations	81.7	32.9%
<b>Total</b>	<b>248.0</b>	<b>100.0%</b>
<b>Total WDBC Destinations</b>	<b>112.3</b>	<b>45.3%</b>
<b>Total Study Area (Zones 1-10)</b>	<b>166.4</b>	<b>67.1%</b>

Source: Table 7a,8a, Appendix J

- 6.4.9 Since the 2011 household survey was undertaken, a new Tesco in Tavistock has opened. This will alter shopping patterns however it is not possible to know precisely what this change will have been. In order to understand the extent to which there has been a change, the Tesco has been added into the shopping patterns at 2016, with the remainder of market shares being adjusted accordingly as shown in Table 6:8.

**Table 6:8 WDBC adjusted convenience spending patterns in 2016**

Destination	Turnover from study area	Market share from study area
Co-op, Brook Street, Tavistock Town Centre	4.9	2.0%
Co-op, Market Street, Tavistock Town Centre	2.6	1.1%
Other, Tavistock Town Centre	7.1	2.9%
Co-op, Market Street, Okehampton Town Centre	6.8	2.8%
Waitrose, School Way, Okehampton Town Centre	20.3	8.3%
Lidl, School Way, Okehampton Town Centre	7.3	3.0%
Other, Okehampton Town Centre	1.9	0.8%
Local Centres and Villages	20.3	8.3%
Lidl, Plymouth Road, Tavistock (OOC)	3.3	1.4%
Morrisons, Plymouth Road, Tavistock (OOC)	27.5	11.3%
<b>Tesco, Plymouth Road Retail Park, Tavistock (OOC)</b>	<b>11.5</b>	<b>4.7%</b>
Other Destinations (Study Area)	52.1	21.3%
All Other Destinations	78.6	32.2%
<b>Total</b>	<b>244.1</b>	<b>100.0%</b>
<b>Total WDBC Destinations</b>	<b>113.4</b>	<b>46.5%</b>
<b>Total Study Area (Zones 1-10)</b>	<b>165.5</b>	<b>67.8%</b>

Source: Table 7b,8b, Appendix J

## 6.5 Key findings

Population and expenditure has been obtained for the study areas used for SHDC and WDBC, and forecast forward to 2021, 2026 and 2034. The growth in population is sharper in WDBC than SHDC. There is limited expenditure growth in the convenience retail sector, but higher growth in the comparison retail sector and leisure sectors.

The spending patterns in the base year for each authority, based on household surveys undertaken in 2013 and 2011 for SHDC and respectively. In the retail sectors, the headline retention levels are as follows:

- **SHDC:** 23.8% in the comparison sector and 57.7% in the convenience sector
- **WDBC:** 22.4% in the comparison sector and 45.3% in the convenience sector, adjusted to 46.5% to take into account the Tesco in Tavistock

## 7 Quantitative retail need

### 7.1 Introduction

- 7.1.1 The retail spending patterns identified in Section 6 set out the starting position for the assessment of quantitative need. In this section, up-to-date assessments of quantitative need is presented. Quantitative need is presented at 2021, 2026 and 2034. It is presented on a cumulative basis; i.e. the quantum of need in 2021 then increased to 2026 and so on. As explained previously, the base years used for SHDC and WDBC are different and this ought to be borne in mind when interpreting results.
- 7.1.2 Population growth for each of the study areas used, based on Devon County Council, is presented at Table 1 in **Appendices M and N**. The expenditure growth for comparison, convenience and food and drink sectors are presented at Tables 2-4.
- 7.1.3 It must be emphasised that capacity forecasts should, in line with the NPPG, be subject to regular review throughout the plan period, in order to ensure an up-to-date evidence base which is based on accurate economic and market trends. The reliability of expenditure forecasts post-2021 lessen and therefore more limited weight should be attached to the longer term estimates of need. This is because of the fluid nature of retail and leisure consumption patterns and the risks associated with long-term forecasting on economic trends which are subject to further uncertainty following the Brexit vote. Given that large regeneration projects can take up to 10 years to come forward, it is reasonable to consider the outputs to 2026 however, it is advised that the post-2021 quantitative forecasts should be treated as guidelines for plan-making purposes and be regularly reviewed.
- 7.1.4 Quantitative need has been calculated in the comparison and convenience retail sectors for both authorities. The remainder of this section explains the claims on expenditure growth, the trading performance of existing floorspace in the base year and then the quantitative need findings are presented.

### 7.2 Claims on expenditure growth

- 7.2.1 The assessment considers two principal claims on expenditure growth; namely the turnover achieved by new commitments and an allowance for existing retailers to improve their performance year on year. It is also possible to consider an improvement in vacancy level, but in this assessment, an allowance for improvement in vacancy levels has not been explicitly modelled, although we address this point in the recommendations at Section 10. Growth in special forms of trading (i.e. the Internet) is also technically a claim, but since this has been removed from the expenditure data at the start of the quantitative exercise, there is no need for it to be considered again.

#### Commitments

- 7.2.1 Commitments are extant planning permissions of developments that are under construction that will not have been open at the time that the household survey was undertaken in 2013 for SHDC and 2011 for WDBC. A full list of the commitments has been obtained from the Council. These are divided into comparison and convenience commitments and are presented in Tables 11a and b at **Appendix I and Appendix J**.

7.2.2 The assessment of commitments makes certain assumptions on turnover levels and splits between comparison goods and convenience goods floorspace. Inevitably, this exercise has some limitations but it is a best estimate based on a consideration of the planning applications and the likely form of retail floorspace coming forward. It is expected that all retail floorspace will be trading by 2021, with some opening earlier and indeed some already trading (such as the Tesco at Tavistock). The turnover of this floorspace is presented at Table 7:1.

**Table 7:1 Commitments in 2021**

Category of goods	SHDC turnover in 2021 (£m)	WDBC turnover in 2021 (£m)
Comparison goods	4.0	1.0
Convenience goods	1.5	12.2

7.2.3 It should be noted that there is retail floorspace within SHDC that has been permitted at Sherford as part of a new community. However, due to the way the JLP is structured and the location of the development, this has been accounted for as part of the retail need figures calculated for PCC.

### Sales density growth

7.2.4 Floorspace efficiency growth, or sales density growth, represents the ability of retailers to achieve higher than inflation increases in their turnover. It is important for retail assessments to take into account this growth since it allows for a certain amount of expenditure growth to be 'ring-fenced' to be spent within existing businesses. Conventionally, retail assessments make an allowance for the year-on-year growth in average sales densities of existing floorspace as a claim on expenditure growth.

7.2.5 The level of this growth allowance is largely dependent on the quality of the retail floorspace and its ability to achieve increased efficiencies. Larger stores with regular footprints will have a greater ability to absorb growth than small, constrained or irregular units. The level of growth allowed for needs to assume constant total floorspace and take into account the quality of the floorspace in the area and the scale of annual expenditure growth (under constant prices) being forecast elsewhere in the assessment. The latter point is important, since the quantum of spending available will have a direct bearing on the ability of existing retailers to increase their turnover vis-à-vis the base position.

7.2.6 Whilst some data providers have sought to quantify the expected levels of expenditure growth, under some scenarios this will exceed the level of annual expenditure growth and therefore is not a reasonable approach. It is clear that there is a lack of credible research on how much expenditure existing businesses can absorb year on year through improvements to their efficiencies. Therefore, PBA have considered the available data and formed its own assumptions on a reasonable level of growth to 'ring-fence' for existing retailers in both the comparison and convenience sectors.

### Comparison sector

- 7.2.7 The ability for the comparison stock to improve its turnover is closely aligned to the quality of the retail stock and adaptability. Due to the range of stock available, an assumption of 1.5% per annum growth is applied and reflective of the older retail stock in across SHBC and WDBC.

### Convenience sector

- 7.2.8 The ability for the convenience sector to improve its turnover year on year is more limited, which is due to the high trading levels that already exist (compared to the comparison sector) and the fact that no expenditure growth is forecast by Experian in the long term. For this reason, PBA have not allowed for the existing floorspace to improve its turnover year on year.

### Food and beverage leisure sector

- 7.2.9 The ability for existing food and drink outlets to improve their turnover year on year will vary significantly depending on the type of outlet being considered and the scope to improve their efficiencies. There is limited evidence on what this sector could reasonably achieve and therefore an arbitrary 0.4% per annum is assumed to take into account the clear trends that this is a growth sector.

## 7.3 Trading performance and tourism expenditure

- 7.3.1 In order to understand needs for new floorspace, it is important to understand the trading performance of existing floorspace in the base year. This is also relevant to the qualitative assessment (Section 8). This exercise has been undertaken in Tables 12a-d, which addresses the comparison sector, convenience sector and food and beverage leisure sector for SHDC and Tables 10a-c for WDBC. Within this analysis, it has been necessary to make assumptions on 'inflow expenditure'; this is expenditure generated from beyond the study area but spent within the study area. A large proportion of this will be tourism expenditure.
- 7.3.2 When considering tourist visitor expenditure, the study area has considered data within the Value of Tourism report for the SHDC to identify the total spend of tourists on shopping. Taking into account this data and the role and function of the floorspace, the following assumptions are used in terms of the proportion of turnover generated by inflow expenditure:
- **SHDC:** in the comparison sector and food and beverage leisure sector, 20% for Dartmouth, 15% for Totnes and 10% for all other destinations. In the convenience sector, 5% for all destinations
  - **WDBC:** in the comparison sector, 20% for Tavistock and 10% for all other destinations. In the convenience sector, 5% for all destinations.
- 7.3.3 It is also possible to make an adjustment in the base year to take into account any evidence of over or under trading. Overtrading refers to the performance of centres and stores within a catchment in relation to the expected benchmark turnovers. The benchmark turnover is the turnover the store would be expected to achieve if trading at company average turnover per sqm rates. Overtrading can also be assessed through qualitative indicators such as overcrowding and congestion in stores. As such, overtrading is both a quantitative and qualitative indicator of need.

- 7.3.4 A benchmark assessment of over / under trading of the convenience sector in the base year is presented at Table 12c at **Appendix I** for SHDC and Table 10c at **Appendix J** for WDBC. The benchmarking exercise is reliant on the use of operator average data in terms of the split between convenience and comparison goods floorspace within the stores (except in some stores where we have adjusted this based on our site visits to stores), and is based on national average sales densities. The sales densities used are from 2015 (and it is recognised that the base years used are earlier, but is considered the most appropriate approach where there has been little growth in the sector). Therefore, it provides a robust, and industry-accepted, method of assessing current trading performance.
- 7.3.5 This assessment has revealed some quantitative overtrading in certain stores, which is balanced out by some under trading in others. There is modest aggregate overtrading across both authorities as summarised below:
- SHDC: overtrading in the Morrisons in Kingsbridge and the Tesco at Lee Mill Industrial Estate
  - WDBC: overtrading in the Waitrose in Okehampton
- 7.3.6 The overtrading outputs are purely based on a numerical calculation. Its implications for quantitative need is considered in more detail below, and the qualitative implications are addressed at Section 8.
- 7.3.7 Quantitatively, for comparison goods floorspace, it is not considered appropriate to make any allowance for any over or under trading. This is primarily because comparison floorspace is generally less susceptible to the physical manifestations of overtrading such as congestion on the shop floor, out-of-stock items and queuing and has more capability to absorb growth. Therefore, it is assumed that the comparison sector is in equilibrium in the base year (i.e. available floorspace equals turnover of existing floorspace). This assumption is also used for the food and drink leisure sector for SHDC.

## 7.4 Quantitative need

- 7.4.1 The assessments of quantitative need are presented at Tables 13 to 15 at **Appendix I** for SHDC and Tables 11-12, attached at **Appendix J**; a summary is presented at Table 16 for SHDC and Table 13 for WDBC. They draw together the analysis of spending growth, claims on expenditure and trading performance to assess the scale of need for additional retail floorspace. The assessments are disaggregated to the six main centres across the two local authorities and then elsewhere in each authority.
- 7.4.2 A full local authority wide figure is also supplied. However, the disaggregated figures should not be summed to calculate the local authority wide figure, since the local authority wide figure in some situations takes into account an oversupply of floorspace due to commitments or overtrading. The reason for showing the needs separately is to ensure that the extent to which current market shares distribute need are clearly understood for plan making purposes.

7.4.3 The approach to presenting the data is common to each of the sectors:

- **Row A – Total expenditure (£m):** this is the total available expenditure in the study area, presented in the base year (2011/13) and each forecast year (2016, 2021, 2026 and 2034)
- **Row B – Market share of study area (%):** this is the expected market share that the local authority and each centre will achieve of the total study area expenditure, initial based on the household survey in 2011/13 and adjusted if necessary in the forecast years (the only adjustment is in the convenience sector in WDBC as is to take into account Tesco in Tavistock).
- **Row C – Retained expenditure (£m):** this is the total amount of retained expenditure achieved by each local authority, which is function of rows A and B
- **Row D – Inflow expenditure (£m):** this is the total amount of spending attracted to the local authority but generated from beyond the study area boundary
- **Row E – Inflow proportion (%):** this is the percentage proportion of inflow, derived from the inflow expenditure (row D)
- **Row F – Total available expenditure (£m):** this is the sum of retained expenditure (row C) and inflow expenditure (row D) and represents the expenditure available to support the turnover of retail floorspace.
- **Row G – Over/under trading (£m):** this represents an adjustment in the base year for under or over trading against benchmarks; it is undertaken in the convenience sector only and is maintained constant through to the forecast years
- **Row H – Turnover of existing floorspace (£m):** this represents the existing turnover of floorspace, as calculated at row F in the base year and then increased to the forecast years using sales density growth rates (see above)
- **Row I – Turnover of commitments (£m):** this represents the estimated turnover of commitments and assumes that they will be trading by 2021; their turnover is increased to the forecast years using sales density growth rates (see above)
- **Row J – Expenditure capacity (£m):** this represents the spare expenditure to support new retail floorspace, taking into account growth to the forecast years, an adjustment for under/overtrading and claims on expenditure (sales density growth and commitments)
- **Row K – Assumed sales density (£ per sqm net/gross):** this is the sales density used to convert the expenditure capacity to a floorspace output. For the retail sector, this is shown as a net figure, but for the food and drink leisure sector it is shown as gross. The sales density is increased to the forecast years using sales density growth rates (see above)
- **Row L/M – net/gross quantitative need:** the net figure (in the retail sector) is the product of rows J and K, with the gross figure calculated by applying standard gross to net ratios. The food and drink leisure sector is shown as gross only

7.4.4 The above shows the common approach to assessing quantitative need. It should be noted that under all sectors, a constant market share has been used, which includes



the distribution of need between the centres and elsewhere in each authority. The appropriateness of this approach is discussed in further detail within the remainder of this section, and within the recommendations at Section 10. The outputs are shown to 2034, but as explained previously, the longer term need outputs should be treated as indicative only.

### Comparison sector

- 7.4.5 The aggregate market share in the comparison sector is 23.6% for SHDC and 22.4% for WDBC. This would indicate there is spending that is not being met locally. However, shopping patterns show a significant amount of current comparison goods retail expenditure going to Plymouth from the SHDC study area, and Plymouth and Exeter from the WDBC study area. The strength of the larger centres, especially one as close as Plymouth and the growth in e-tailing and m-tailing mean that clawback of this expenditure (i.e. an increased market share) is unlikely. As part of the consultation exercise for SHDC, agents have also reported that even if new units were available suitable for multiple retailers they would not necessarily attract occupiers and not be able to significantly alter the spending patterns. Therefore, adopting a constant market share is an appropriate starting point.
- 7.4.6 The constant market share has been adopted for each local authority as a whole, as well as each of the main centres. Therefore, where need is presented, it is presented for the local authority, then each centre and then an amount is ring-fenced for elsewhere to take into account the market shares of other destinations (including smaller centres, out of centre, villages and stand-alone shops). The need for each local authority and split per centre is presented on a cumulative basis at Table 7.2 and Table 7.3 in both net and gross figures rounded to the nearest 10 sqm.

Table 7:2 Comparison goods need in SHDC

Destination	2016	2021	2026	2034
<b>District Wide (sqm net)</b>	<b>1,900</b>	<b>1,690</b>	<b>3,550</b>	<b>6,900</b>
<b>District Wide (sqm gross)</b>	<b>2,540</b>	<b>2,250</b>	<b>4,730</b>	<b>9,200</b>
Dartmouth (sqm net)	240	220	450	870
Dartmouth (sqm gross)	320	290	600	1,160
Ivybridge (sqm net)	240	300	530	940
Ivybridge (sqm gross)	310	390	700	1,250
Kingsbridge (sqm net)	610	760	1,350	2,420
Kingsbridge (sqm gross)	810	1,020	1,800	3,230
Totnes (sqm net)	430	530	950	1,700
Totnes (sqm gross)	570	710	1,260	2,260
Elsewhere SHDC (sqm net)	400	-120	270	970
Elsewhere SHDC (sqm gross)	530	-160	360	1,290

Source: Table 16, Appendix I

**Table 7:3 Comparison goods need in WDBC**

<b>Destination</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2034</b>
<b>Borough Wide (sqm net)</b>	<b>1,550</b>	<b>2,150</b>	<b>3,930</b>	<b>7,100</b>
<b>Borough Wide (sqm gross)</b>	<b>2,070</b>	<b>2,870</b>	<b>5,240</b>	<b>9,470</b>
Tavistock (sqm net)	1,030	1,530	2,710	4,800
Tavistock (sqm gross)	1,370	2,040	3,610	6,410
Okehampton (sqm net)	330	500	880	1,560
Okehampton (sqm gross)	440	660	1,170	2,080
Elsewhere WDBC (sqm net)	190	120	340	740
Elsewhere WDBC (sqm gross)	260	160	460	980

Source: Table 13, Appendix J

- 7.4.7 For both authorities, the need in the comparison sector is modest in the near term to 2021, but increases sharply in the longer term to 2034. The longer term figures, beyond 2021, should be treated as guidelines as explained at paragraph 7.1.3.

### Convenience sector

- 7.4.8 An identical approach has been undertaken in the convenience goods sector where the assessment relies on a constant market share. For WDBC, a minor adjustment to market shares has been undertaken to take into account the opening of Tesco in Tavistock. The modest overtrading within the convenience sector has been built into the model. This approach is considered robust in the circumstances. The convenience need for each local authority is set out in Table 7:4 and Table 7:5.

**Table 7:4 Convenience goods need in SHDC**

<b>Destination</b>	<b>2016</b>	<b>2021</b>	<b>2026</b>	<b>2034</b>
<b>District Wide (sqm net)</b>	<b>250</b>	<b>180</b>	<b>380</b>	<b>410</b>
<b>District Wide (sqm gross)</b>	<b>380</b>	<b>280</b>	<b>580</b>	<b>630</b>
Dartmouth (sqm net)	-60	-70	-70	-60
Dartmouth (sqm gross)	-90	-100	-100	-90
Ivybridge (sqm net)	160	140	150	150
Ivybridge (sqm gross)	240	220	230	240
Kingsbridge (sqm net)	-150	-150	-150	-150
Kingsbridge (sqm gross)	-230	-230	-230	-230
Totnes (sqm net)	-530	-560	-550	-530
Totnes (sqm gross)	-810	-860	-850	-820
Elsewhere SHDC (sqm net)	1,150	820	890	1,000
Elsewhere SHDC (sqm gross)	1,770	1,270	1,370	1,530

Source: Table 16, Appendix I

7.4.9 In SHDC, the need remains broadly static during the study period with marginal increases. The need that exists is only connected with overtrading, and the surplus figures shown are also connected with under trading. Whilst most of the need is shown to be 'elsewhere in SHDC', this is due to the overtrading of large edge and out of centre foodstores. This need should be distributed in accordance with the sequential approach and is explained in further detail in Section 10.

Table 7:5 Convenience goods need in WDBC

Destination	2016	2021	2026	2034
<b>Borough Wide (sqm net)</b>	<b>950</b>	<b>-270</b>	<b>-20</b>	<b>310</b>
<b>Borough Wide (sqm gross)</b>	<b>1,470</b>	<b>-410</b>	<b>-40</b>	<b>480</b>
Tavistock (sqm net)	-140	-160	-130	-90
Tavistock (sqm gross)	-210	-250	-200	-140
Okehampton (sqm net)	610	550	620	730
Okehampton (sqm gross)	940	840	960	1,130
Elsewhere WDBC (sqm net)	480	-650	-520	-330
Elsewhere WDBC (sqm gross)	730	-1,000	-800	-510

Source: Table 13, Appendix J

7.4.10 Across WDBC, there is practically no quantitative need on an aggregate basis. This is due, in part, to the Tesco Tavistock commitment which has been deducted from any growth and observed overtrading. However, there is a modest localised need in Okehampton, which ought to be reflected in policy.

## 7.5 Key findings

A step by step assessment of quantitative retail need has been undertaken which forecasts retail needs over the Plan period up to 2034. This takes into account existing spending and spending growth, and then allows for deductions including sales density growth of existing retailers and commitments. Need is distributed on the basis of a constant market share, which is justified given the market signals evidence on the role larger centres play in the hierarchy of centres. The longer term figures (post-2021) should be treated as guidelines for plan-making purposes but should be regularly reviewed. The need is split by centre and local authority area, as follows:

- **SHDC:** 3,550 sqm net / 4,730 sqm gross in the comparison sector up to 2026, increasing to 6,900 sqm net / 9,200 sqm gross by 2034. In the convenience sector, the figures are 380 sqm net / 580 sqm gross by 2026 increasing very marginally to 410 sqm net / 630 sqm gross by 2034.
- **WDBC:** 3,930 sqm net / 5,240 sqm gross in the comparison sector up to 2026, increasing to 5,820 sqm net / 7,760 sqm gross by 2034. In the convenience sector, there would be a borough wide surplus in 2026 increasing very marginally to 310 sqm net / 480 sqm gross by 2034.

## 8 Qualitative retail need

### 8.1 Introduction

- 8.1.1 Qualitative need concerns the type and quality of retail floorspace that may be required in a particular area. Typically, issues concern identifying gaps in local provision, consumer choice and competition, overtrading, location-specific issues (such as accessing retail facilities in deprived or rural areas) and the quality of existing provision. These overlapping criteria are reviewed below for SHDC followed by WDBC with reference to qualitative comparison and convenience goods needs for each town centre.
- 8.1.2 The health check assessments at Section 4 and Section 5 assess the vitality and viability of centres in the SHDC and WDBC respectively. The key findings from these health checks provide evidence on suggested improvements to the centres which provide a helpful indicator of qualitative need. Additionally, at Section 6, the spending patterns within SHDC and WDBC are explained, including commentary on different retail sectors. Section 4 of the TCRS sets out a detailed review of comparison spending patterns for WDBC. This analysis is drawn upon to reach conclusions on qualitative need. The assessment of qualitative need must also have consideration to the market signals and economic trends outlined in Section 3 of this report.
- 8.1.3 Gaps in retail provision are ultimately subjective; what one particular shopper may consider a gap in provision may not be of particular concern to another. Therefore, subject to their position in the hierarchy, centres need to be able to meet a range of shopping requirements, in order to help minimise expenditure leakage and promote sustainable patterns of shopping. The assessment of qualitative needs, as set out in following section of this report, takes this into account.

### 8.2 South Hams District Council

#### Ivybridge

- 8.2.1 Ivybridge exerts a limited influence over comparison spending patterns across the study area. With a market share of just 3.1%, it has the second-lowest market share of all SHDC town centres which is unsurprising considering that Ivybridge is also the smallest town centre. Ivybridge also retains just 16% of comparison spending locally within its home zone (Zone 1) (Table 5 Appendix I). Ivybridge town centre also exerts a limited influence over convenience spending patterns across the study area. This spending patterns analysis confirms that the role of the centre is focused on meeting the retail needs of residents within a limited catchment area.
- 8.2.2 Ivybridge provides a good range of comparison stores for a centre of its size with a high proportion of independent retailers. There are no fashion retailers, department or variety stores present in the centre. This gap in provision is not considered to be a cause for concern since many of items typically sold in department stores (fashion, electrical, household, furniture, china, gifts, toys, sports and beauty) are available in other town centre stores. There is also limited representation from some traditional bulky goods categories (electrical, DIY, household, sports and toys); as a result of the format of the centre, Ivybridge has a limited amount of suitable floorspace for traditional bulky goods operators. Overall the comparison offer is considered to support the role and function of the centre.

- 8.2.3 The comparison trading assessment shows that Ivybridge town centre achieves a sales density of £2,729 per sqm net, allowing for inflow (Table 12a, Appendix I). Although Ivybridge has the second-highest comparison sales density amongst all SHDC town centres it is considered to be low in the context of competing centres. For example, Plymouth city centre has an estimated turnover of £5,931 per sqm net<sup>13</sup> and most national multiple fashion retailers would typically turnover around £5,000 per sqm net (including VAT). Ivybridge's sales density reflects the nature of the local retail offer. This is comprised of small units occupied by independent retailers which are typically less efficient than national multiples operating from larger stores.
- 8.2.4 Ivybridge contains a range of convenience stores which provide a satisfactory level of consumer choice. However, there is scope to diversify the convenience offer to further improve consumer choice. The town centre provides two national operators, Co-op and Tesco Express which are both positioned in the middle of the market. These supermarkets are complemented by a small selection of independent butchers, baker's delicatessen, confectioners and health food stores. The centre does not provide a discount food store offer and the nearest discount food store, Lidl Plymouth Road, is located in approximately 10 km to the west in Plymouth.
- 8.2.5 The convenience trading assessment shows that the Co-op, Glanville Mill, is overtrading at £1.5m above company benchmark levels. However, this level of overtrading is not considered to be a cause for concern since PBA did not record any signs of overtrading during the site visits (Table 12c Appendix I). However, the out of centre Tesco, Lee Mill Industrial Estate is significantly overtrading at £9.1 above company benchmark levels. While there is limited need for new retail floorspace in Ivybridge arising from expenditure capacity arising over the study period (Table 14a, Appendix I), this level of overtrading suggests that Ivybridge may be able to support additional convenience floorspace through the redistribution of spending from Tesco, Lee Mill Industrial Estate subject to compliance with the relevant retail policy tests.
- 8.2.6 The health check of Ivybridge town centre, presented in Section 6 of this report, concludes that the centre performs well against most indicators and is considered to fulfil its role in the town centre hierarchy. The town centre provides a pleasant environment for visitors and shoppers alike and contains a range of local facilities which support footfall in the town centre. While it is considered that the centre performs well in terms of its role in the retail hierarchy, there is scope to diversify the convenience offer.

## Totnes

- 8.2.7 Totnes exerts a limited influence over comparison spending patterns across the study area, although, with a market share of 5.0%, it has the second-highest market share of all SHDC town centres. Totnes retains 35.2% of comparison spending locally within its home zone (Zone 6) (Table 5 Appendix I). This is representative of the local retail offer; although Totnes is the largest centre, the retail offer has a strong focus on the tourist market with a significant number of gift shops. As a result, the turnover of retailers in Totnes will be supported to a more significant extent by tourism spending than either Kingsbridge or Ivybridge. Totnes also exerts a limited influence over convenience spending patterns across the study area. However, Morrisons on the edge of the town centre attracts a significant convenience market share, at 6.2%.

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<sup>13</sup> PBA estimate based on Plymouth Retail Study 2016 and Experian GOAD

This spending patterns analysis confirms that the role of the centre is focused on meeting local retail needs as well as serving the tourist market.

- 8.2.8 In the comparison sector, there is only one clear gap in provision, in the cars and accessories sub-category and there is limited representation in other traditional bulky goods categories (sports and toys). The town centre, with its constrained, historic layout and stock of small retail units (most under 500 sqm), is ill-suited to meet typical bulky goods retailers' requirements for large floorplates, adjacent customer car parking and efficient HGV access. Overall Totnes is considered to provide a good range of comparison stores for its size which support the role and function of the centre.
- 8.2.9 The comparison trading assessment shows that Totnes town centre achieves a sales density of just £1,682 per sqm net, allowing for inflow (Table 12a, Appendix I). Totnes has the second-lowest comparison sales density amongst all SHDC town centres. The centre's sales density is also considered to be low in the context of competing centres considering that Plymouth city centre has an estimated turnover of £5,931 per sqm net. This sales density reflects the nature of the local retail offer which is mainly comprised of small units occupied by independent retailers which are typically less efficient than national multiples operating from larger stores.
- 8.2.10 Totnes contains a range of mid-market convenience stores with a focus on organic/local produce. However, there is scope to diversity the convenience offer and further improve consumer choice. The centre provides a mix of national multiples, including Budgens, Morrisons and Holland and Barratt as well as a number of independents such as bakers, butchers, green grocers and delicatessens. The centre does not provide a discount food store although there is a Lidl located in Paignton town centre 8km to the east of Totnes.
- 8.2.11 The convenience trading assessment shows that the Morrisons, Coronation Road, is marginally overtrading at £2.8m above company benchmark levels (Table 12c Appendix I). PBA did not record any qualitative signs of overtrading and, taking this into account, this level of overtrading is not considered to be a cause for concern.
- 8.2.12 The health check of Totnes town centre, presented in Section 6, concludes that the centre performs well against most indicators and is considered to fulfil its role in the hierarchy. Totnes provides a pleasant environment for visitors and shoppers alike and the centre contains a range of tourist attractions which support footfall in the town centre. Overall it is considered that the centre is performing well in terms of its role in the retail hierarchy and there is limited scope for qualitative improvement.

## Kingsbridge

- 8.2.13 Kingsbridge exerts a limited influence over comparison spending patterns across the study area. However, with a market share of 7.7% it has highest market share of all SHDC town centres. This is not surprising considering that the town centre retail offer is less focused on the tourist market compared to centres such as Dartmouth and Totnes. Kingsbridge retains 46.1% of comparison spending locally within its home zone (Zone 6) (Table 5, Appendix I). Kingsbridge town centre also exerts a limited influence over convenience spending patterns across the study area. Morrisons, Redford Meadow and Tesco, Cookworthy Road on the edge of Kingsbridge both attract a significant convenience market share from across the study area at 7.6% and 4.5% respectively. These spending patterns confirm that the role of the centre is

focused on meeting retail needs of local residents and residents from the surrounding rural catchment.

- 8.2.14 In the comparison sector there is only one clear gap in provision in the variety and department stores sub-category although most of the items typically sold in department stores (fashion, electrical, household, furniture, china, gifts, toys, sports and beauty) are available in other town centre stores. In common with other SHDC town centres, representation in traditional bulky goods categories such as electrical, DIY, household, sports and toys is limited. The town centre property offer is ill-suited to accommodate department store operators which typically require large floorplates whereas the majority of retail units in Kingsbridge provide less than 500 sqm floorspace. Similarly, the property stock and layout of the town centre is not suited to meet typical bulky goods retailers' requirements for large floorplates, adjacent customer car parking and efficient HGV access. Overall the comparison retail offer in Kingsbridge is considered to support the role and function of the centre.
- 8.2.15 The comparison trading assessment shows that Kingsbridge town centre achieves a sales density of £3,116 per sqm net, allowing for inflow, which is the highest amongst all SHDC town centres (Table 12a, Appendix I). This is not surprising considering that Kingsbridge has the highest comparison market share and the second greatest amount of comparison floorspace of all SHDC town centres. The centre's sales density is still considered to be low in the context of competing centres such as Plymouth city centre which has an estimated turnover of £5,931 per sqm net. Kingsbridge's sales density reflects the nature of the retail offer which is mainly comprised of small units occupied by independent retailers which are typically less efficient than national multiples operating from larger stores.
- 8.2.16 Kingsbridge contains a range of mid-market convenience stores which provide a satisfactory level of consumer choice although there are no discount operators serving the immediate local catchment. The nearest discount food store, Lidl Townstal Road, Dartmouth is located 14km to the east of Kingsbridge town centre. The centre provides a mix of national multiple and independent operators which appear to complement each other. Morrisons and Tesco's supermarkets are located on the edge of the centre while the town centre contains a number of small specialist food stores.
- 8.2.17 The convenience trading assessment shows that the Morrisons, Redford Meadow is significantly overtrading at £13.1m above company benchmark levels (Table 12c Appendix I) although PBA did not record any qualitative signs of overtrading on the site visit. The evidence of quantitative overtrading suggests that there may be opportunity to support additional convenience floorspace in Kingsbridge through the redistribution of spending from Morrisons, Redford Meadow subject to compliance with the relevant retail policy tests.
- 8.2.18 The health check of Kingsbridge town centre, presented in Section 6 of this report, concludes that the centre performs well against most indicators and is considered to fulfil its role in the retail hierarchy. Certain parts of the town centre, including Bridge Street, Church Street and the Anchor Shopping Centre could benefit from investment to improve shop frontages and the public realm in line with the rest of the town centre. SHDC are currently progressing the Kingsbridge Quay Masterplan which covers the area south of the town centre although Bridge Street / Church Street are not currently within the Masterplan area. While the centre performs well in terms of its role in the retail hierarchy, there is scope for qualitative improvements to parts of the public realm.

## Dartmouth

- 8.2.19 Dartmouth exerts a limited influence over comparison spending patterns across the study area with a market share of just 2.6%, it has the lowest market share of all SHDC town centres. Dartmouth retains 29.5% of comparison spending locally within its home zone (Zone 7) (Table 5 Appendix I). This is representative of the local retail offer; while Dartmouth has a good fashion offer for a centre of its size the retail offer has a strong focus on the tourist market overall. As a result, the turnover of retailers in Dartmouth will be supported to a more significant extent by tourism spending than either Kingsbridge or Ivybridge. Dartmouth also exerts a limited influence over convenience spending patterns across the study area although the out of centre Sainsbury's, Nelson Road attracts a significant amount of spending with a market share of 4.5%. This spending patterns analysis confirms that the role of the centre is focused on meeting local retail needs as well as serving the tourist market.
- 8.2.20 In the comparison sector there is only two gaps in provision; the variety and department stores and cars and accessories sub-categories. The property stock and layout of the town centre is not suited to accommodate the requirements of department stores. These typically require large floorplates, whereas the majority of units in Dartmouth town centre provides 500 sqm floorspace or less. This is not considered to be a major issue since items typically sold in department stores (fashion, electrical, household, furniture, china, gifts, toys, sports and beauty) are available in other town centre stores. In common with other SHDC town centres representation in traditional bulky goods categories such as electrical, DIY, household, sports and toys is also limited due to the fact that the town centre property offer is ill-suited to meet the physical requirements of such retailers. Overall the comparison offer in Dartmouth is considered to support the role and function of the centre albeit there is a high proportion of units selling goods aimed at the tourist market.
- 8.2.21 The comparison trading assessment shows that Dartmouth town centre achieves a sales density of £ 1,584 per sqm net, allowing for inflow, which is the lowest amongst all SHDC town centres (Table 12a, Appendix I). The centre's sales density is considered to be low in the context of competing centres such as Plymouth city centre with an estimated turnover of £5,931 per sqm net. Dartmouth's sales density reflects the role of the centre which is the greatest beneficiary of tourist spending out of all SHDC town centres. This is also characteristic of the local retail offer which is mainly comprised of independent retailers, albeit there are a number of national multiple fashion retailers.
- 8.2.22 Dartmouth contains a range of convenience stores, including national operators and independents which provide a good level of consumer choice. There are three national multiple convenience operators in the centre; Marks & Spencer's, Co-op food and Spar which operate small stores. This main offer is complemented by a number of independent retailers with a focus on fresh local produce including butchers, bakers, fishmongers, green grocers and delicatessens many of which are located in the Market Square. Additionally, there are two large supermarkets located 1.4 km west of the town centre, Sainsbury's Nelson Road and Lidl Townstal Road which is the only discount foodstore in SHDC.
- 8.2.23 The convenience trading assessment shows that Sainsbury's Nelson Road and Lidl Townstal Road are both marginally under trading at -£0.8m and -£1.0m below company benchmark levels respectively (Table 12c Appendix I). However, this is not considered to be a cause for concern since both of these stores had only been



trading for a short period when the SHDC household survey was undertaken in March/April 2013 whereas shopping patterns usually take approximately two years to 'bed- in'.

- 8.2.24 The health check of Dartmouth town centre, presented in Section 6, concludes that the centre performs well against most health check indicators and is considered to fulfil its role in the town centre hierarchy with limited scope for qualitative improvement.

### **8.3 West Devon Borough Council**

#### **Okehampton**

- 8.3.1 Section 4 of the TCRS provides a detailed description of spending patterns across WDBC in 2011. The findings show that Okehampton exerts a limited influence over comparison spending patterns in WDBC, with a market share of 5.3%. Even within a localised catchment area; the Okehampton Core Catchment Area, the town centre only retains 23.8% of comparison spending.
- 8.3.2 The WDBC adjusted convenience spending patterns, explained in Section 6 of this report (Table 8b, Appendix J), find that foodstores in Okehampton town centre have a combined market share of 14.9% across the study area and a combined market share of 56.0% within the Okehampton CCA. This spending patterns analysis confirms that the role of the centre is focused on meeting the retail needs of residents in a localised catchment, but also serving the convenience needs for a wider rural catchment.
- 8.3.3 In the comparison sector there are some gaps in provision in the footwear, variety and department and cars and accessories sub-categories. There is also limited representation from fashion retailers and traditional bulky goods sub-categories (electrical, DIY, household, sports and toys). Given its limited catchment area Okehampton is not suited to meet the locational requirements of retailers selling high order comparison goods, particularly national multiples. These gaps in provision are not considered to be a cause for concern and the comparison offer supports the role and function of the centre. WDBC has a limited out of centre retail offer and faces a significant level of competition from out of centre retail parks in Plymouth.
- 8.3.4 The comparison trading assessment shows that Okehampton town centre achieves a sales density of £2,262 per sqm net, allowing for inflow, which is the lowest of the two WDBC town centres (Table 10a, Appendix J). The centre's sales density is considered to be low in the context of competing centres such as Plymouth city centre which has an estimated turnover of £5,931 per sqm net. Okehampton's sales density reflects the character of the local retail offer which is mainly comprised of independent retailers and small units (under 500 sqm), except for the main supermarkets.
- 8.3.5 Okehampton provides a diverse, high quality convenience offer with a mix of national operators and independents which provides excellent consumer choice. There are three supermarkets in the town centre operated by national multiples; Waitrose, Co-op and Lidl. The supermarkets are complemented by some smaller independent retailers; bakery, butchers and health food shops.
- 8.3.6 The convenience trading assessment shows that Lidl School Way and Waitrose School Way are both trading above company benchmark levels at £4.1m and £8.1m

respectively (Table 10c Appendix J). This is not surprising considering that Okehampton contains the only Waitrose store in WDBC and neighbouring SHDC. On the other hand, the Co-op, Market Street is marginally under trading at -£0.4m below company benchmark levels due the high degree of local competition for convenience expenditure.

- 8.3.7 The health check of Okehampton town centre, presented in Section 6, concludes that the centre performs well against most health check indicators and is considered to fulfil its role in the town centre hierarchy with limited scope for qualitative improvement.

### **Tavistock**

- 8.3.8 Section 4 of the TCRS provides a detailed description of spending patterns across WDBC in 2011. The findings shown that that Tavistock exerts a relatively greater influence over comparison spending patterns in WDBC, with a market share of 14.8% and a 43.0% market share within the Tavistock CCA.
- 8.3.9 The WDBC adjusted convenience spending patterns, explained in Section 6 of this report (Table 8b, Appendix J), find that foodstores in Tavistock town centre have a combined market share of just 6% across the study area and a combined market share of 20.7% within the Tavistock CCA. This spending patterns analysis confirms that the role of the centre is focused on meeting the retail needs of residents from the surrounding rural catchment.
- 8.3.10 In the comparison sector there is only one gap in provision in the variety and department stores sub-category, although most of the items typically sold in department stores (fashion, electrical, household, furniture, china, gifts, toys, sports and beauty) are available in other town centre stores. The centre also has limited representation from some traditional bulky goods sub-categories (electrical, DIY, household, sports and toys) as a result of the retail stock. The centre predominantly comprises small units (under 500 sqm) which are ill-suited to meet the requirements of variety / department stores for larger floorplates. However, Tavistock provides a limited out of centre offer, focused along Plymouth Road, with the following sub-categories represented; pets, cycles, carpets and textiles as well as a specialist farm supply store. Overall the town centre provides a good comparison offer with a complimentary out of centre comparison offer which does not appear to underline the role of the town centre.
- 8.3.11 The comparison trading assessment shows that Tavistock town centre achieves a sales density of £3,718 per sqm net, allowing for inflow which means that Tavistock achieves the highest turnover of all town centres in SHDC and WDBC (Table 10a, Appendix J). This is not surprising considering that Tavistock also has the greatest amount of comparison floorspace, at 13,728 sqm gross of all SHDC/WDBC town centres.
- 8.3.12 Tavistock provides a relatively limited convenience offer compared to Okehampton with more limited consumer choice. The centre contains two Co-op food stores which are complimented by a range of small independent stores such as bakers, butchers, groceries and small convenience stores as well as the farmer's market. Tavistock also has a significant out of centre convenience retail offer with three national multiple supermarket operators located off Plymouth Road; Morrisons, Tesco and Lidl.

8.3.13 The convenience trading assessment shows that Co-op Brook Street is under trading at -£0.7m while the Co-op Market Street is over trading at £0.6m above company benchmark levels. However, PBA did not record any signs of overtrading at Market Street during the site visits. In terms of the out of centre retail offer, Lidl Plymouth Road is found to be overtrading at £3.5m above company benchmark levels and Morrisons Plymouth Road is under trading by -£1.0m (Table 10c Appendix J). PBA did not record any signs of overtrading at Lidl during the site visits.

## 8.4 Key findings

This report has identified the need for qualitative improvements in each town centre in SHDC and WDBC drawing on the health checks in (Section 4 and Section 5) and the spending patterns analysis (Section 6) as follows:

- Totnes performs well against the majority of health check indicators and there is limited need for qualitative improvements. However, consumer choice in the convenience sector could be further improved through the provision of a discount foodstore within the town. Currently residents must travel to the neighbouring town of Paignton for their nearest discount food store.
- Kingsbridge performs well against the majority of health check indicators and there is limited need for qualitative improvements. There is scope to improve the town centre experience by upgrading the public realm and shop frontages at the southern end of the town. Consumer choice in the convenience sector could be further improved through the provision of a discount food store within the town.
- Dartmouth performs well against the majority of health check indicators and there is no clear need for qualitative improvements to the retail offer. The health check identified that there is limited car parking in the town centre and the prevalence of on-street parking contributes to congestion in the centre. Investing in out-of-season attractions in the town centre could also reduce seasonal fluctuations in trade in the town centre.
- Ivybridge performs well against the majority of health check indicators and there is limited need for qualitative improvements. However, consumer choice in the convenience sector could be further improved through the provision of a discount foodstore within the town. Currently residents must travel to Plympton for their nearest discount food store.
- Tavistock performs well against the majority of health check indicators and there is limited need for qualitative improvements. Consumer choice and competition in the convenience sector could be improved through the provision of other national multiples. The Co-op is the only convenience national multiple present in the centre and currently operates two stores.
- Okehampton performs well against the majority of health check indicators and there is no clear need for qualitative improvements to the retail offer. The health check identified that congestion in the town centre, generated by cars visiting the town centre supermarkets, is an issue. The health checks also identified scope to further improve visitor facilities in the town centre, such as accommodation and evening leisure facilities.

## 9 Commercial leisure

### 9.1 Introduction

- 9.1.1 In this section, the needs for commercial leisure uses are set out. The uses assessed are those as leisure uses within Annex 2 of the NPPF on main town centre leisure uses, namely '*leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls)*'. Leisure uses are a key component of vital and viable town centres as they drive footfall and linked retail trips.
- 9.1.2 The assessment of leisure needs is both quantitative and qualitative. However, the quantitative assessment has less available data to benchmark against and is therefore more broad brush. The assessment is also informed by stakeholder consultation and an audit of provision.

### 9.2 Growth in expenditure

- 9.2.1 Table 9:1 sets out how spend on leisure activities is forecast to change in the study area between 2011/2013 and 2034.

**Table 9:1 Leisure expenditure growth by category**

Category	SHDC		WDBC	
	2013-2026	2013-2034	2011-2026	2011-2034
Recreational and sporting services (£m)	4.4	7.6	4.7	8.0
Cultural services (£m)	9.7	16.8	9.6	16.5
Games of chance (£m)	3.1	5.3	2.9	4.9
Restaurants, cafes etc. (£m)	33.8	58.6	33.9	58.0
Accommodation services (£m)	9.3	9.3	9.2	9.2
Hairdressing salons & personal grooming (£m)	3.1	5.4	9.2	15.7
<b>Total leisure (£m)</b>	<b>63.4</b>	<b>103.0</b>	<b>69.4</b>	<b>112.3</b>

Source: Table 4, Appendix I and J

- 9.2.2 The spending data includes categories beyond the leisure assessment undertaken in this study, particularly within some of the cultural activities, accommodation services and hairdressing. However, the exercise demonstrates the importance of the food and beverage sector (restaurants etc.) to the economy, representing in excess of half of the total leisure expenditure.
- 9.2.3 The increased spend on leisure services could support a range of new restaurants, cafes, bars, salons and bookmakers across the study area. The increases in spend may also support additional investment in accommodation, and recreation and sport (including family entertainment). However, the role of nearby larger centres needs to be considered when judging the extent to which SHDC and WDBC can rely upon this expenditure growth to support their town centres in the longer term.

## 9.3 Survey results

9.3.1 Leisure uses are a key component of town centres because they help to increase footfall and linked retail trips, both during the day and at night. The telephone survey of households undertaken in 2013 included a number of questions aimed at finding out where residents spend most money in relation to various types of leisure services. The most popular destinations are shown at Table 9:2

**Table 9:2 Leisure survey results**

Survey zone	Restaurants/ cafes	Bars/clubs and pubs	Cinema	Museums, art galleries, zoos	Family entertainment	Health and fitness	Gambling	Theatre and concerts
<b>Zone 1</b> Ivybridge	Ivybridge (32%)	Ivybridge (75%)	Vue Cinema, Plymouth (75%)	Paignton Zoo (31%)	Barbican Leisure Park (34%)	Ivybridge (35%)	Plymouth (73%)	Theatre Royal, Plymouth (55%)
<b>Zone 2</b> Ermington, Modbury, Ugborough	Plymouth (31%)	Wembury (12%)	Vue Cinema, Plymouth (80.2%)	Paignton Zoo (21%)	Plymouth (29%)	Ivybridge (18%)	Plymstock (33%)	Theatre Royal, Plymouth (75%)
<b>Zone 3</b> Lee Mill	Plymouth (58%)	Plymouth (32.6%)	Vue Cinema, Plymouth (95%)	Plymouth (44%)	Barbican Leisure Park (47%)	Ivybridge (21%)	Grosvenor G Casino, Plymouth (20%)	Theatre Royal, Plymouth (80%)
<b>Zone 4</b> Plympton, Plymstock	Plymouth (61.9%)	Plymouth (44.3%)	Vue Cinema, Plymouth (94.0%)	Paignton Zoo (40.0%)	Barbican Leisure Park (60.5%)	Plymouth (25.6%)	Plymouth (53.8%)	Theatre Royal, Plymouth (84.3%)
<b>Zone 5</b> South Brent, Halwell	Plymouth (23.8%)	South Brent (33.3%)	Vue Cinema, Plymouth (42.5%)	Exeter (28.6%)	Barbican Leisure Park (15.4%)	Ivybridge/ McCaulays/ Quayside, Kingsbridge (16.7%)	Grosvenor, Kingsbridge/ South Brent (16.7%)	Theatre Royal, Plymouth (76.2%)
<b>Zone 6</b> Kingsbridge, Salcombe	Kingsbridge (63.4%)	Kingsbridge (66.7%)	The Reel, Kingsbridge (53.0%)	Paignton (23.4%)	Barbican Leisure Park/ Kingsbridge (17.6%)	Quayside, Kingsbridge (50.0%)	Kingsbridge (50.0%)	Theatre Royal, Plymouth (66.7%)
<b>Zone 7</b> Dartmouth	Dartmouth (61.9%)	Dartmouth (48.0%)	Apollo, Paignton (34.4%)	Paignton (36.7%)	Barbican Leisure Park/ Dartmouth (14.3%)	Dartmouth (48.0%)	Dartmouth (42.9%)	Theatre Royal, Plymouth (38.8%)
<b>Zone 8</b> Totnes, Dartington	Totnes (73.1%)	Totnes (73.2%)	Apollo, Paignton (48.3%)	Paignton (44.6%)	Dartmouth/ Living Coasts (8.3%)	Totnes (59.1%)	Totnes (50.0%)	Theatre Royal, Plymouth (39.6%)

Source: Household survey at Appendix K

9.3.2 Analysis of household spending patterns shows that considerable available leisure expenditure is leaked to Plymouth in particular, although retention rates are reasonable for bars/restaurants, pubs and health and fitness.

- 9.3.3 Section 9 of the TCRS sets out equivalent data for WDBC and this is not repeated within this document.

## 9.4 Food and beverage

### South Hams District Council

- 9.4.1 As businesses differ greatly, from national chains through to smaller independent outlets, quantifying the scale of food and beverage needs can only be broad brush. However, this exercise has been undertaken for SHDC and the findings for the food and beverage sector are summarised at Table 9:3.

Table 9:3 Food and beverage need in SHDC

Destination	2016	2021	2026	2034
<b>District Wide (sqm gross)</b>	<b>690</b>	<b>1,240</b>	<b>2,140</b>	<b>3,000</b>
Dartmouth (sqm gross)	90	160	280	470
Ivybridge (sqm gross)	90	170	290	490
Kingsbridge (sqm gross)	150	270	460	790
Totnes (sqm gross)	120	220	390	660
Elsewhere LBHF (sqm gross)	240	420	730	1,250

Source: Table 15, Appendix I

- 9.4.2 Therefore, based on a broad brush quantitative assessment, there is scope for additional food and beverage uses across the district; approximately 3,000 sqm gross across the district to 2034.
- 9.4.3 Turning to the qualitative assessments as set out in Section 4, in general terms across the district there is an under-provision in percentage terms of the restaurant and café offer compared to national benchmarks. This is important due to the value of this sector to the economy and the role of food and beverage uses anchoring town centres, as explained in Section 3. The key findings for each centre were as follows:
- 9.4.4 Dartmouth appeared the most successful centre in the study area in sustaining an evening economy. There is a good variety of restaurant and drinking establishments. This includes gastro pubs such as the newly developed George and Dragon, traditional pubs such as The Cherub Inn and upscale restaurants including the Brown's Hotel Bar and the Royal Castle Hotel. The Flavel entertainment centre, which includes a cinema, theatre, café and bar, also appeared popular with residents and visitors. PBA's site visit indicated that evening economy venues in Dartmouth are well used.
- 9.4.5 Totnes is considered the second most successful centre in the study area in sustaining an evening economy. There is a moderate provision of bars and restaurants in the centre, including traditional pubs such as the Kingsbridge Inn and Bay Horse Inn, the Rumour Wine Bar and a number of independent restaurants. However, the evening economy uses appeared sparsely distributed throughout the centre, and the centre appeared quiet after the shops had closed.

- 9.4.6 Kingsbridge is considered to have fairly moderate success in sustaining an evening economy. The centre contains a number of independent restaurants offering a variety of cuisines, such as the Wharfside Brasserie, Kerala Delacassies and La Ranchera. The centre also offers a small number of pubs and bars suitable for evening drinking. However, the offer is considered to be fairly limited considering the size of Kingsbridge. In general, the centre holds a limited offer, with units generally catering towards day-time trade, such as coffee shops and tea rooms that would close in the evening.
- 9.4.7 Ivybridge appeared to be the least successful centre in terms of sustaining an evening economy; evening uses in the centre are limited to a small number of independent restaurants and public houses. The findings of the 2013 Ivybridge Town Centre and Retail Study visitor survey showed that 42% of visitors reported to never visit Ivybridge Town Centre for evening entertainment while just 9.7% of respondents reported to visiting the Town Centre on a weekly basis for evening entertainment.
- 9.4.8 Given the current rate of leakage and anticipated increases of spend per head that are expected in the restaurant/café category over the Plan period, it is recommended that in SHDC growth in the food and beverage sector should be supported at a level proportionate to the role and function of the centres.

### **West Devon Borough Council**

- 9.4.9 In WDBC, as with SHDC, there is an under provision of restaurants and cafés compared to national benchmarks.
- 9.4.10 Tavistock appeared the most successful centre in the study area in sustaining an evening economy. The evening economy offer in Tavistock is largely comprised of public houses such as The Cornish Arms, The Queens Head which appear to be clustered at the western side of the town centre. The centre also has a small selection of independent restaurants however, the evening economy provision in Tavistock is still considered fairly limited given the size of Tavistock. The food and drink offer is more focused towards cafes and deli's which cater for day time trade. As such, the majority of the centre appeared quiet during the evening.
- 9.4.11 Okehampton is comparatively less successful than Tavistock in terms of an evening economy. The restaurant and bar offer in the town centre is moderate. Public houses included those such as the Plymouth Inn, The Kings Arms, and the Fountain Inn. A JD Wetherspoon pub and hotel, The White Hart, also appeared to be popular. The centre also has a limited number of independent restaurants. However overall, the offer in Okehampton is more catered towards cafés and tearooms which cater for day time trade.

## **9.5 Cinemas**

- 9.5.1 The cinema offer in SHDC and WDBC is made up of small independent cinemas. There are currently of six screens in SHDC; the Kings Cinema, Fore Street, Kingsbridge (three screens), the out of centre cinema at Dartington Art Centre, Totnes (one screen), the Curzon Cinema at the Watermark, Erme Court, Ivybridge (one screen) and the Flavel Arts Centre, Flavel Place, Dartmouth (one screen). There are currently three cinema screens in WDBC; the single screen 200-seat cinema at The Wharf in Tavistock and the two-screen New Carlton Cinema in Okehampton.



9.5.2 Cinema operators typically undertake decisions to invest on screen density per 100,000 persons. According to Dodona research, the 2015 average screen density across the UK is 6.4 screens per 100,000 persons. The South West regional screen density is 6.3 screens per 100,000 persons. Using this screen density, and considering the existing number of screens, it is possible to undertake a straightforward gap analysis of the need for additional screens. The assessment is shown at Tables 9.4 and 9.5 below. The key inputs are:

- The assessment is based on the local authority area
- Population projections taken from Devon County Council, consistent with those used in the retail analysis
- 100% retention which neutralises inflows and outflows
- Cinema potential is based on a screen density of 6.3 screens per 100,000 persons

**Table 9:4 Cinema capacity SHDC**

South Hams DC	2016	2021	2026	2034
Total population	84,701	85,797	86,672	87,170
Retention rate	100.0%	100.0%	100.0%	100.0%
Potential catchment	84,701	85,797	86,672	87,170
Cinema screen potential	5.3	5.4	5.5	5.5
Existing cinema screens	6	6	6	6
Cinema screen capacity	-0.7	-0.6	-0.5	-0.5

9.5.3 The gap analysis shows that there is no capacity for additional cinema screens in SHDC. Irrespective of the gap analysis there is considerable leakage of cultural services expenditure from the SHDC study area to Plymouth, particularly to the Vue Cinema. This would indicate that there is potential for the provision of cinema screens to claw back expenditure. However, it is unlikely a large multiplex could be supported SHDC.

**Table 9:5 Cinema capacity WDBC**

West Devon BC	2016	2021	2026	2034
Total population	54,771	56,662	58,312	59,589
Retention rate	100.0%	100.0%	100.0%	100.0%
Potential catchment	54,771	56,662	58,312	59,589
Cinema screen potential	3.5	3.6	3.7	3.8
Existing cinema screen	3	3	3	3
Cinema screen capacity	0.5	0.6	0.7	0.8

- 9.5.4 The gap analysis shows that there is a screen capacity of just less than 1 screen. Similar to SHDC, there is leakage of expenditure to large multi-screen cinemas which indicate that this could be clawed back. However, it is considered this is unlikely to be achievable.
- 9.5.5 In summary, there is no pressing need for additional cinema screens in either local authority. This should not preclude niche operators coming forward in central sites should there be sufficient demand (such as the Totnes cinema refurbishment), since the calculations are based on average screen densities and there are situations in the Country where screen densities are higher, and thus participation is also higher. This will, in effect, create demand. However, for the purposes for plan making, the calculations are sound.

## 9.6 Games of chance

- 9.6.1 Games of chance include bingo halls as well as bookmakers and casinos. The existing facilities in each authority are summarised below:

- SHDC:
  - Kingsbridge: Pat Potter Sports Betting, Ladbrokes, SHDC Bingo Club
  - Totnes: William Hill
  - Ivybridge: None
  - Dartmouth: None
- WDBC:
  - Tavistock: William Hill, Betfred
  - Okehampton: none

- 9.6.2 The majority of the expenditure leakage for those that participate in such activities is towards Plymouth. Whilst there is some limited expenditure growth in this sector and possibly the scope for a clawback in expenditure, such activities of this nature are increasingly undertaken online. Therefore, there is no clear evidence of a qualitative or quantitative need for additional games of chance facilities in either local authority.

## 9.7 Health and fitness

- 9.7.1 The existing health and fitness facilities within SHDC and WDBC are summarised at Table 9:6 and It is possible to undertake a broad brush assessment of capacity for gym facilities. According to the 2015 State of the UK Fitness Industry Report (published by DB Leisure), 1 in every 8 people in the UK are members of a gym, representing a penetration rate high of 13.7%. Assuming that gym memberships are in line with the national average, then there are a total of 11,604 members in SHDC and 7,504 members in WDBC in 2016.
- 9.7.2 There are 18 facilities in SHDC and WDBC Districts. This gives an average of 1061 members per facility. The State of the UK Fitness Industry reports that in 2015 there were 8.8 million members of health and fitness facilities (public and private sector)

and that there were some 6,312 facilities. This gives an average of 1,394 members per facility.

9.7.3 Based on this broad brush calculation the average number of members per facility in SHDC and WDBC (1061 members per facilities) is significantly lower than the national average. This in turn indicates that there is no quantitative need in the short to medium-term for additional facilities.

9.7.4 Table 9:7.

9.7.5 The tables indicate that the split between public and private facilities in SHDC and WDBC is the same. Both authorities have 5 public facilities and 4 private facilities respectively, producing a total of 18 health and fitness facilities across the two districts.

**Table 9:6 Health & fitness facilities in SHDC**

Gym/ Leisure Centre	Location	Type	Facilities
Quayside Leisure Centre	Ropewalk Kingsbridge TQ7 1HN	Public	Gym, studio, swimming pool, bowls hall, squash court, café
Hen House Fitness Health & Beauty	Coombe Farm, Kingsbridge, TQ7 4AB	Private	Gym, massage & holistic therapies, osteopathy, pilates & yoga, physiotherapy, Thai chi, personal training
Unit6 CrossFit	Avon Mill, Loddiswell, Kingsbridge TQ7 4DD	Private	Gym, group training classes
Dartmouth Leisure Centre	Wessex Way, Dartmouth TQ6 0JL	Public	Gym, studio, badminton court
Ivybridge Leisure Centre	Erme Court, Leonards Rd, Ivybridge PL21 0SL	Public	Gym, studio, swimming pool, sports hall, squash court, cafe
Ivybridge Health & Fitness Centre	Ivybridge Health & Fitness Centre	Public	Gym, strength and training room, sports hall, dance studio, courts, athletics tracks
Mccauleys Health Club	Ivybridge Gym & Dinnaton Golf Club, Ivybridge PL21 9HU	Private	Gym, swimming pool, spa, squash court
Totnes Pavillion	Borough Park Rd, Totnes TQ9 5XW	Public	Gym, studio, bowls hall, swimming pool
Devon Hills Fitness	Totnes Rd, Paignton TQ4 7PW	Private	Gym, swimming pool, spa

Source: PBA desktop research and site visits

9.7.6 It is possible to undertake a broad brush assessment of capacity for gym facilities. According to the 2015 State of the UK Fitness Industry Report (published by DB Leisure), 1 in every 8 people in the UK are members of a gym, representing a penetration rate high of 13.7%. Assuming that gym memberships are in line with the

national average, then there are a total of 11,604 members in SHDC and 7,504 members in WDBC in 2016.

9.7.7 There are 18 facilities in SHDC and WDBC Districts. This gives an average of 1061 members per facility. The State of the UK Fitness Industry reports that in 2015 there were 8.8 million members of health and fitness facilities (public and private sector) and that there were some 6,312 facilities. This gives an average of 1,394 members per facility.

9.7.8 Based on this broad brush calculation the average number of members per facility in SHDC and WDBC (1061 members per facilities) is significantly lower than the national average. This in turn indicates that there is no quantitative need in the short to medium-term for additional facilities.

**Table 9:7 Health & fitness facilities in WDBC**

Gym/ Leisure Centre	Location	Type	Facilities
Parklands Leisure Centre	Simmons Park, Okehampton EX20 1EP	Public	Gym, group fitnesses classes, swimming pool, football and badminton courts, treatment rooms, café
Curves Womens Gym Tavistock	1C, Westbridge Industrial Estate, Tavistock PL19 8DE	Private	Gym, group and individual fitness classes
Peak Health and Fitness	Unit 1A Westbridge Trading Estate, Tavistock PL19 8DE	Private	Gym, individual training
Tavistock Community Sports Centre	Tavistock PL19 8DD	Public	Gym, sportshall, indoor cricket nets, climbing wall, all weather pitch, athletics track, dance studio, swimming pool, outdoor pitch, grass pitches
Meadowlands Leisure Pool	The Wharf, Tavistock PL19 8SP	Public	Swimming pool, group exercise classes, tennis, café
Body Zone Health Studio	Crelake Industrial Estate, Pixon Ln, Tavistock PL19 9AZ	Private	Gym, cycle studio, group training classes
Mount Kelly Swim Centre	Mount Kelly Swim Centre, Parkwood Road, PL19 0HZ	Public	Swimming pool
The Phoenix Health Club	Fatherford Farm, Industrial estate, Unit 3A, Devon, EX20 1QQ	Private	Gym, group exercise training
Okehampton College	Mill Rd, Okehampton EX20 1PW	Public	Gym, all weather-pitch, sports hall

Source: PBA desktop research and site visits

## 9.8 Family entertainment

- 9.8.1 'Family entertainment' (which includes facilities such as ten-pin bowling and outdoor activity centres). The existing facilities in each authority are summarised below:
- SHDC:
    - Woodlands Leisure Park, Dartmouth – Family activity centre, including ten pin bowling
    - The Play Station, Totnes – Outdoor and indoor soft play centre
  - WDBC
    - Tree Surfers, Tavistock – Outdoor adventure centre;
    - Roadford Lake Country Park, Tavistock – Outdoor activity centre;
    - Southwest Segway Adventure, Tavistock – Segway centre
    - Simmons Park, Okehampton – Outdoor adventure centre;
- 9.8.2 The high quantity of outdoor play centres in SHDC, WDBC is likely to be driven by tourist demand, particularly during the summer months and school holiday periods. Notably, there are no ice rinks in SHDC or WDBC.
- 9.8.3 The main areas of leakage for family entertainment are towards Plymouth and Exeter. These centres have a greater choice of facilities targeted towards family entertainment and are easily accessible by private car and public transport. For example, facilities such as Crealy Adventure Park and Riverside Play Centre in Exeter and Dartmoor Zoological Park and West Hoe Adventure Park in Plymouth are likely to attract visitors from SHDC and WDBC.
- 9.8.4 There is some expenditure growth in this sector although the scope to clawback expenditure is likely to be fairly minimal. Therefore, there is no clear evidence of a qualitative need for additional family entertainment facilities in either local authority. However, based on current activities, as part of strategies to encourage dwell time in town centres, family entertainment facilities should be encouraged in appropriate locations.

## 9.9 Key findings

The key findings of the commercial leisure assessment are outlined below:

- The food and beverage sector is a key component to the economy, representing more than half of the total leisure expenditure in both SHDC and WDBC between 2013 and 2034.
- Considerable available leisure expenditure is leaked from both local authorities, to Plymouth in particular, although retention rates are reasonable for bars/restaurants, pubs and health and fitness.
- In terms of a broad quantitative assessment, in SHDC there is scope for additional food and beverage uses across the district for approximately 3,000 sqm gross up to 2034.
- In terms of a qualitative assessment, in general terms across both districts there is an under-provision of restaurants and cafés compared to national benchmarks.
- Town centres in SHDC and WDBC have a fairly limited evening economy in general. Dartmouth appeared to be the most successful centre in this respect, with a good selection of restaurants and drinking establishments.
- There is no capacity for additional cinema screens in SHDC and a screen capacity of just less than 1 screen in WDBC based on current spending patterns. However, there is considerable leakage of cultural service expenditure indicating potential for the provision of additional screens to claw back expenditure.
- Assuming gym membership in the study area reflects national average figures gives an average of 1,061 members per gym facility in the study area. This is lower than the national average (1,394 members per facility), which in turn indicates that there is no quantitative need in the short to medium-term for additional facilities.
- There is no clear evidence of a qualitative need for additional family entertainment facilities in either local authority. However, as part of strategies to encourage dwell time in town centres, facilities should be encouraged in appropriate locations.

## 10 Recommendations

### 10.1 Introduction

10.1.1 In this section, the key recommendations from this study are set out for the two local authorities to consider incorporating into its planning policies. Firstly, we present the findings on the quantitative need for retail uses across each local authority as a whole without distributing this need; we include some advice on how the quantitative need findings should be used in practice. Then we set out initial findings for each of the main centres in each authority, taking into account the quantitative need (based on a constant market share) and the qualitative needs that have been highlighted in this study and potential opportunities to meet the needs that exist. Finally, policy advice on boundaries, Local Plan policies in respect of paragraph 23 of the NPPF and monitoring advice is provided.

### 10.2 Quantitative need for retail uses

10.2.1 The NPPF (paragraph 161) requires evidence on quantitative and qualitative needs for retail and leisure development over the Plan period. Quantitative effectively means how much floorspace is required, whilst from a qualitative perspective we need to consider what type of floorspace is required. It is necessary to consider both elements of need to understand how to formulate planning policies. In respect of quantitative need for retail floorspace, we have calculated based on a constant market share (i.e. each local authority maintains its current share of spending within the District to 2034). This is presented for retail floorspace that sells convenience goods (i.e. food and grocery) and comparison goods (non-food items). It is presented on the basis of net sales area and gross for each authority on a cumulative basis.

Table 10:1 Summary of quantitative need

Destination	Sector	2016	2021	2026	2034
SHDC (sqm net)	Comparison	1,900	1,690	3,550	6,900
SHDC (sqm gross)	Comparison	2,540	2,250	4,730	9,200
SHDC (sqm net)	Convenience	250	180	380	410
SHDC (sqm gross)	Convenience	380	280	580	630
<b>SHDC (sqm net)</b>	<b>Combined</b>	<b>2,150</b>	<b>1,870</b>	<b>3,930</b>	<b>7,310</b>
<b>SHDC (sqm gross)</b>	<b>Combined</b>	<b>2,920</b>	<b>2,530</b>	<b>5,310</b>	<b>9,830</b>
WDBC (sqm net)	Comparison	1,550	2,150	3,930	7,100
WDBC (sqm gross)	Comparison	2,070	2,870	5,240	9,470
WDBC (sqm net)	Convenience	-60	-270	-20	310
WDBC (sqm gross)	Convenience	-90	-410	-40	480
<b>WDBC (sqm net)</b>	<b>Combined</b>	<b>1,490</b>	<b>1,880</b>	<b>3,910</b>	<b>7,410</b>
<b>WDBC (sqm gross)</b>	<b>Combined</b>	<b>1,980</b>	<b>2,460</b>	<b>5,200</b>	<b>9,950</b>

Source: Table 13, Appendix I and Table 11 Appendix J (figures are cumulative)

- 10.2.2 As well as providing the floorspace needs by sector, the figures have also be combined. The assessment of quantitative needs does not include the needs for any A1 service uses or any other A class uses (i.e. A2, A3, A4 and A5), although the A3-A5 uses have been broadly quantified in the assessment of leisure needs for SHDC.
- 10.2.3 The quantitative need has been presented in the technical appendices as broken down by each of the main centres, as well as an aggregate other category. These more detailed figures can be used as a guide to where floorspace can be accommodated. However, we would recommend focusing initially on the borough wide figures and consider wider strategic planning issues when considering where this growth should be accommodated.
- 10.2.4 The quantitative exercise demonstrates that there is a need for new floorspace to sell comparison goods, but this is largely generated at the end of the Plan period (between 2026 and 2034) when expenditure growth and population growth result in a potential need for additional floorspace. The near term and medium term needs are much more modest.
- 10.2.5 In respect of convenience, there are very limited quantitative needs in WDBC as a whole, although there is evidence of localised needs in Okehampton. There is a modest need in SHDC, although this is across the borough and not directed to anyone one centre. It should be emphasised that the convenience needs only materialise due to overtrading, and there is very little expenditure growth in this sector.
- 10.2.6 Whilst the quantitative needs for new floorspace, presented in Table 10:1 on a cumulative basis, is formulaic, the approach to qualitative needs can be more flexible and take into account local factors such as location of new development, quality of accommodation or gaps in provision. The headline findings of the qualitative needs assessment for each town centre are:
- Totnes: consumer choice in the convenience sector could be improved through the provision of a discount foodstore in the town
  - Kingsbridge: the town centre experience could be improved by upgrading the public realm and shop frontages in the area around the Anchor shopping centre
  - Dartmouth: the town centre experience could be improved by reducing congestion in the town centre. Seasonal fluctuations in the town centre trade could also be reduced by investing in out of season attractions and other measures to encourage shoppers
  - Ivybridge: consumer choice in the convenience sector could be further improved through the provision of a discount convenience offer in the town
  - Tavistock: consumer choice and competition in the convenience sector could be improved through the provision of other national multiples convenience retailers in addition to Co-op
  - Okehampton: the town centre experience could be improved by traffic calming measures to reduce congestion in the town centre and the provision of additional visitor facilities such as accommodation and evening leisure facilities.



10.2.7 In respect of leisure uses, the methodology for establishing needs is less evolved than the retail approach due to limited data availability on existing turnover and trading levels of leisure businesses and the broad formats of development that exist. This has been married with a qualitative assessment and consideration of demand to assess needs for leisure floorspace. The headline findings in the leisure sector are:

- Food and beverage: in SHDC there is scope for approximately 3,000 sqm gross additional food and beverage uses up to 2034 based on current spending patterns which does not take into account the potential to claw-back expenditure leaked to Plymouth;
- Food and beverage: town centres in both SHDC and WDBC have a fairly limited evening economy and restaurants and cafés are under-provided compared to national benchmarks;
- Cinema: based on current spending patterns there is no capacity for additional cinema screens in SHDC and capacity for less than 1 screen in WDBC. However, there is considerable leakage of cultural service expenditure indicating potential for the provision of additional screens to claw back expenditure;
- Gyms: there is no quantitative need for additional facilities in the short-medium term. Based on PBA estimates, SHDC and WDBC have an average of 1,061 members per gym facility which is lower than the national average (1,394 members per facility); and,
- Family entertainment: there is no clear evidence of a qualitative need for additional family entertainment facilities in either SHDC or WDBC although such facilities should be encouraged in appropriate locations as part of strategies to improve dwell time in town centres.

### 10.3 Meeting needs

10.3.1 The sixth bullet point under paragraph 23 of the NPPF states 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'*. The paragraph continues and states that *'it is important that needs for retail, office and other main town centre uses are met in full and are not compromised by limited site availability'*. Therefore, it is important that planning policy responds positively to meeting the needs that exist from both a quantitative and qualitative perspective.

10.3.2 When interpreting quantitative need outputs it should be remembered that quantitative need is an outcome of expenditure growth calculations whereby surplus expenditure is converted to a floorspace quantum. The quantitative exercise in this study has already allowed for existing retailers to improve their turnover year on year and for special forms of trading in order to achieve a greater share of expenditure. The claim of retail commitments on expenditure growth is also modelled, but in this case no allowance has been made for improved vacancy levels. So the resultant needs are effectively the spare expenditure capacity once the above calculations have taken place, assuming that both local authorities maintain their market share. The spare expenditure is then converted to a quantitative need. There are various approaches to meet these needs, as follows:

- Opening of new floorspace through developments

- Extensions to existing units, or mezzanine floors
- Changes of use to retail
- Converting back of house (storage) to sales floorspace
- Re-occupation of vacant floorspace
- Improving tenant profile to retailers with a higher turnover per sqm
- Higher year on year performance of existing floorspace than has been assumed (1.5% per annum for the comparison sector between 0% in the convenience sector).

10.3.3 In respect of the final point above, under certain conditions, it is possible for existing floorspace to improve its turnover beyond this allowance. The ability to achieve this higher rate is dependent on two things:

- First, the quality and configuration of existing floorspace is important, with modern floorspace with larger footplates better equipped to improve their level of sales per sqm
- Secondly, whether there are qualitative interventions that could take place to make more customers visit a centre, have an increased dwell time and therefore spend more money in existing shops.

10.3.4 To measure the effect of this approach is challenging since it will depend on a number of interlinking factors. However, given that most town centres have a mix of modern and dated floorspace, achieving an increased turnover per sqm beyond the allowance used will normally only be possible with significant intervention under the second point above. Therefore, a strategy to meet needs ought to take into account all of the above factors.

10.3.5 The most straightforward approach to ensure that there are sufficient sites to meet needs are to ensure that there are sufficient development opportunities, apply the sequential test. We recognise that additional town centre uses have been planned for and permitted at the urban extension at Sherford. These uses have not been explicitly considered in this assessment, however some of the quantitative and qualitative needs in SHDC might be met within this development. However, the retail floorspace in this development has been accounted for within the evidence for PCC and therefore is not available to meet the needs as set out in this study.

10.3.6 A series of sites have been considered at Appendix L. In respect of the deliverability of these sites, we advise that the desirability and viability of the redevelopment of these sites is thoroughly tested to understand the potential contribution these sites can make in meeting the needs. However, when this testing is undertaken, it should be recognised that quantitative comparison needs are generated in the longer term and as such there is a merit in safeguarding sites for future development towards the end of the plan period.

## 10.4 Town centre strategies

10.4.1 The NPPF requires local authorities to promote competitive town centre environments. The NPPG emphasises the importance of having a town centre vision which should cover the following topics:

- Role and function of the town
- Opportunity to meet assessed needs for town centre uses
- Timeframe for the delivery of retail floorspace
- Complementary strategies
- Measures to enhance town centre parking.

10.4.2 The NPPG states that while town centre strategies should cover three to five-year period although they should take the lifetime of the Local Plan into account and be regularly reviewed.

10.4.3 Taking account of the NPPG it is considered appropriate for strategies to focus on meeting retail needs for a five year period. In order to ensure that long-term retail needs emerging over the life time of the plan are taken in to account strategies should be subject to regular reviews to coincide with the review of quantitative retail needs.

10.4.4 Town centre strategies cover a wide range of topics and this section outlines a potential framework for a town centre strategy for each of the six main centres that have been assessed in this study. This framework can be used by the authorities to formulate town centre strategies through the preparation of planning policy, although we emphasise the importance of ensuring the deliverability of any strategy.

### Ivybridge

10.4.5 Ivybridge is an attractive centre which is considered to perform well in term of its function in the hierarchy and meets the retail needs of local residents. Based on the capacity forecasts in this report there is very limited quantitative comparison and convenience needs in the short-medium term. There is a need for 1,250 sqm gross additional comparison floorspace in the long term (by 2034). The broad brush assessment of quantitative need found that there could be demand for up to 490 sqm gross additional floorspace Class A3-A5 floorspace in Ivybridge over this period. There is no evidence of quantitative need for other commercial leisure facilities (cinema, family entertainment) in the town centre.

10.4.6 The qualitative needs assessment identified that consumer choice in the convenience sector in the town could be improved by diversification of the convenience offer, potentially through the provision of a discount foodstore in the town. While there is limited quantitative need for new convenience floorspace Ivybridge experiences a significant amount of expenditure leakage to Tesco Extra Lee Mill which is found to be significantly over trading. Subject to market demand and the identification of suitable sites it is considered that there may be potential to claw back expenditure from Tesco in order to support an enhanced town centre convenience offer.

- 10.4.7 In terms of accommodating needs, the Ivybridge Central Area site is considered to be the most appropriate location for new retail and leisure development. The site is considered to have capacity to meet the moderate quantitative retail and Class A3-A5 floorspace needs forecast in this report without the need to identify additional sites. While this report has not identified any quantitative need for other additional leisure facilities such facilities should be encouraged where they come forward on central sites to enhance the sports and leisure role of the town. Adopted policy for Ivybridge Central Area includes proposals for new dwellings which, if delivered, would support footfall in the town centre and potentially improve the comparison turnover of existing retail floorspace in the centre which is currently estimated at £2,729 per sqm net.
- 10.4.8 In terms of formulating a town centre strategy the advice is to protect the vitality and viability of Ivybridge and build on its successful role by promoting the redevelopment of the Ivybridge Central Area site as the most appropriate location for new retail and leisure development.

### Totnes

- 10.4.9 Totnes is an attractive centre which is considered to perform well in term of its function in the hierarchy; meeting local retail needs as well as serving the tourist market. Based on the capacity forecasts in this report there are very limited quantitative comparison and convenience needs in the short-medium term. There is a need for additional 2,260 sqm gross comparison floorspace in the long term (by 2034). The broad brush assessment of quantitative need found that there could be a need for up to 660 sqm gross additional floorspace Class A3-A5 floorspace by 2034. There is no evidence of quantitative need for other commercial leisure facilities (cinema, family entertainment) in the town centre although Totnes is currently the only town centre in SHDC without a cinema.
- 10.4.10 The qualitative needs assessment identified that consumer choice in the convenience sector in the town could be improved by diversification of the convenience offer through the provision of a discount convenience offer in the town. However, it is considered that there is no convenience expenditure capacity or potential for claw back to support significant convenience retail development in the town centre over the study period.
- 10.4.11 In terms of accommodating needs, the Totnes Central Area site is considered to be the most appropriate location for new retail and leisure development. The site is considered to have capacity to meet the moderate quantitative retail and Class A3-A5 floorspace forecast in this report without the need to identify additional sites. While no quantitative needs for other additional leisure facilities have been identified such facilities should be encouraged where they come forward on central sites to enhance the leisure and tourist role of the town. Adopted policy for Totnes Central Area also includes proposals for new dwellings which, if delivered, would support footfall in the town centre and potentially improve the turnover of existing retail floorspace which is currently estimated at £1,682 per sqm net (Table 12a, Appendix I).
- 10.4.12 In terms of formulating a town centre strategy the advice is to protect the vitality and viability of Totnes and build on its successful role by promoting the redevelopment of the Totnes Central Area site as the most appropriate location for new retail, leisure and tourism-related development.

## Kingsbridge

- 10.4.13 Kingsbridge is an attractive centre which is considered to perform well in term of its function in the hierarchy; meeting retail needs of local residents and residents from the surrounding rural catchment. Based on the capacity forecasts in this report there are very limited quantitative comparison and convenience needs in the short term. There is a need for additional comparison floorspace in the medium term (1,020 sqm gross by 2021) and in the long term (3,230 sqm gross by 2034). The broad brush assessment of quantitative need found that there could be demand for up to 790 sqm gross additional floorspace Class A3-A5 floorspace up to 2034. There is no evidence of quantitative need for other commercial leisure facilities (cinema, family entertainment) in the town centre.
- 10.4.14 The quantitative assessment of convenience need shows that there is insufficient expenditure capacity to support new convenience floorspace over the study period; in fact, the capacity assessment shows that there is a relative oversupply of convenience goods floorspace (Table 14a, Appendix I). The qualitative needs assessment identified that the town centre experience could be improved for visitors by upgrading the public realm and shop frontages in the area surrounding the Anchor Shopping Centre to bring it in line with the high quality public realm throughout the rest of the centre.
- 10.4.15 In terms of accommodating needs, Kingsbridge town centre is relatively constrained by the topography of the town itself. It is considered that in the short-medium comparison retail needs could be met through a combination of; minor extensions to existing units or mezzanine floors; changes of use to retail; converting back of house (storage) to sales floorspace; and the re-occupation of vacant floorspace. The Council are progressing the Kingsbridge Quayside Masterplan which may provide an opportunity to accommodate new leisure uses in or on the edge of the town centre including additional Class A3-A5 floorspace to meet assessed needs. The emerging Masterplan for Kingsbridge contains proposals for significant new employment and residential development which would support footfall in the town centre and could potentially improve the turnover of existing retail floorspace which is currently estimated at £ 3,116 per sqm net (Table 12a, Appendix I).
- 10.4.16 In terms of formulating a town centre strategy the advice is to protect the vitality and viability of Kingsbridge and build on its successful role by promoting the redevelopment of the Quayside with new leisure facilities, including food and beverage outlets to enhance the towns evening economy. Complimentary strategies to improve the quality of the public realm and shopping environment around the Anchor shopping centre could help to increase footfall and improve the performance of retailers in this part of the town.

## Dartmouth

- 10.4.17 Dartmouth is an attractive centre and tourist destination which is considered to perform well in term of its function in the hierarchy; meeting local retail needs as well as serving the tourist market. Based on the capacity forecasts in this report there are very limited quantitative comparison and convenience needs in the short – medium term. There is a need for 1,160 sqm gross additional comparison floorspace in the long term (by 2034). The broad brush assessment of quantitative need found that there could be demand for up to 470 sqm gross additional floorspace Class A3-A5

floorspace up to 2034. There is no evidence of quantitative need for other commercial leisure facilities (cinema, family entertainment) in the town centre.

10.4.18 The qualitative needs assessment in this report has not identified any clear gaps in the town centre retail offer although it is recognised that the retail offer is focused towards serving the tourist market which makes it vulnerable to seasonal fluctuations in trade. The Council are currently proposing to introduce free car parking out of season at the park and ride facility to support out of season footfall. The qualitative needs assessment identified that the town centre experience could be improved for visitors by improving access into the town centre by sustainable modes and reducing congestion along the streets.

10.4.19 In terms of accommodating needs, Dartmouth is also relatively constrained by the topography of the town. It is considered that identified comparison retail and Class A3-A5 floorspace needs could be met through a combination of; minor extensions to existing units or mezzanine floors; changes of use; converting back of house (storage) to sales floorspace; and the re-occupation of vacant floorspace.

10.4.20 In terms of formulating a town centre strategy the advice is to protect the vitality and viability of Dartmouth and encourage its already successful role. Complimentary strategies to improve access by sustainable modes and reduce congestion should be promoted alongside measures to support footfall out of season.

## Tavistock

10.4.21 Tavistock is an attractive centre which is considered to perform well in term of its function in the hierarchy; meeting retail needs of local residents and residents from the surrounding rural catchment as well as serving the local tourist market. Based on the capacity forecasts in this report there are very limited quantitative comparison and convenience needs in the short term. There is a need for additional comparison floorspace in the medium term (2,040 sqm gross up to 2021) and in the long term (6,410 sqm gross by 2034). The health check identified that restaurants and cafes are limited in Tavistock compared to national benchmarks with a lack of evening leisure facilities. There is no evidence of quantitative need for other commercial leisure facilities (cinema, family entertainment) in the town centre.

10.4.22 The qualitative needs assessment in this report identified that consumer choice and competition in the convenience sector could be improved through the provision of other national multiples retailers in addition to the Co-op. However, is considered that there is not significant convenience expenditure capacity or sites to support significant convenience retail development in the town centre over the study period. The health check assessment identified that there is scope to provide additional visitor facilities in the town centre, including accommodation and leisure facilities, to support the development of an improved evening economy.

10.4.23 In terms of accommodating needs, Tavistock town centre is relatively constrained by the topography of the town centre itself. The River Tavy runs parallel to the main shopping streets which prevents expansion of the town centre to the south. The Tavistock Conservation Area designation presents a further constraint which proposals for any new large scale retail development would need to overcome. As a result, there is limited opportunity to deliver significant new retail development in the town centre to meet long term comparison needs. The Council should therefore consider the role of out of centre sites (ref: WD3 and WD6) identified in Appendix L of

this report, in providing additional comparison floorspace. If any edge or out of centre sites are considered as allocations, the following ought to be incorporated into policy:

- Retail schemes should be complementary to the existing heart of the town centre
- The class of goods should generally speaking be of a type that are not sold within the town centre, and conditions on what can be sold would be expected to be attached to any planning permission granted
- Similarly, the unit size proposed should be of a scale that cannot be provided within the town centre
- Finally, any allocation should be subject to an assessment of retail impact.

10.4.24 In terms of formulating a town centre strategy the advice is to protect the vitality and viability of Tavistock and promote its already successful role. If long-term needs for comparison floorspace cannot be met in the town centre, then the Council should assess edge and out of centre options to identify the most suitable sites and consider safeguarding these sites to meet long term retail needs.

### Okehampton

10.4.25 Okehampton is an attractive centre which is considered to perform well in term of its function in the hierarchy; meeting the retail needs of local residents and the convenience needs for a wider rural catchment as well as serving the local tourist market. Based on the capacity forecasts in this report there are very limited quantitative comparison and convenience needs in the short – medium term. There is a need for additional comparison floorspace in the long term (2,080 sqm gross by 2034). There is also a localised need for additional convenience floorspace in the long term (1,130 sqm gross by 2034) this need emerges as a result of overtrading in the town centre.

10.4.26 The health check identified that restaurants and cafes are under-provided in Okehampton compared to national benchmarks with a lack of evening leisure facilities. There is no evidence of quantitative need for other commercial leisure facilities (cinema, family entertainment) in the town centre.

10.4.27 The qualitative needs assessment in this report has not identified any clear gaps in the town centre retail offer although the town centre experience could be improved by traffic calming measures to reduce congestion. Furthermore, it is considered that there is scope to provide additional visitor facilities such as accommodation and leisure facilities to support the development of the evening economy.

10.4.28 In terms of accommodating needs, the School Way site is considered to be the most appropriate location for new retail and leisure development. The site currently comprises a mix of business and retail uses as well as servicing areas for the Red Lion Yard. The site could form an extension to the town centre retail circuit; it is located in between the primary shopping area (Fore Street) to the south and Waitrose supermarket to the north. However, the site is in multiple ownership which means that the local authority will need to take a leading role to deliver new development. The site is considered to have capacity to meet the quantitative retail and leisure needs forecast in the short to medium term without the need to identify additional sites.

10.4.29 In terms of formulating a town centre strategy the advice is to protect the vitality and viability of Okehampton and promote its already successful role by promoting new retail, leisure and tourism-related development on the School Way site as the most appropriate location for new retail and leisure development. Complementary strategies to improve access by sustainable modes and reduce congestion in the town centre should be promoted.

## 10.5 Policy recommendations

10.5.1 The NPPF requires a definition of a network and hierarchy of centres that is resilient to anticipated future economic change. Based on the evidence we have collected, the centres within the two authorities should be designated as town centres, along with a network of smaller local centres. These should be clearly given ‘centre’ status in planning policy, recognising that Annex 2 of the NPPF excludes out of centre developments and parades of purely neighbourhood significance from the definition of a ‘town centre’. Table 10:2 and Table 10:3 set out the identified retail hierarchy for SHDC and WDBC.

**Table 10:2 SHDC retail hierarchy**

Designation	Centre name
Town centre	Dartmouth, Ivybridge, Kingsbridge, Totnes and Sherford new community
Local centre	Chillington, Stokenham, Modbury, Salcombe, Woolwell, Yealmpton

**Table 10:3 WDBC retail hierarchy**

Designation	Centre name
Town centre	Tavistock and Okehampton
Local centre	Hatherleigh, North Tawton, Bere Alston and Lifton

10.5.2 The NPPF requires local authorities to define the extent of town centres and primary shopping areas, based on a clear designation of primary and secondary frontages in designated centres. Based on the definitions in Annex 2 of the NPPF, the methodology for defining such boundaries and frontages ought to start centrally and work outwards. If we are considering the position now, the approach is as follows:

- Define first primary frontages as those frontages that include a high proportion of retail uses (including food, drinks, clothing and household goods). In our view, these ought to represent the frontages with most day time footfall,
- Then define secondary frontages as those frontages that include town centre uses, but have a wider diversity of non-retail uses, such as restaurants, cinemas and businesses. Smaller centres do not always have secondary frontages.



- Using the primary and second frontages, the primary shopping area should be defined as an area where retail is concentrated by plotting the area around primary retail frontages and adjoining and closely related secondary frontages. It does not necessary follow that secondary frontages fall within the primary shopping area, but often they do. This area typically represents the retail heart of a town.
  - Finally, the town centre boundary should be plotted that incorporates all of the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. So this means the area will incorporate any adjacent non-retail town centre uses, such as leisure uses, offices, arts, cultural and tourism uses.
- 10.5.3 It is possible for smaller centres that the primary shopping area is identical to the town centre boundary and this is the case with the centres assessed in this study.
- 10.5.4 It will always be necessary to consider whether there is a requirement to intervene in policy terms to change these areas from what is currently on the ground, for example to facilitate development by expanding a primary shopping area. Or to encourage diversification by reducing a primary frontage and converting it to secondary. In any event, the eventual boundaries will need to be tested and consulted upon as policy are prepared. The boundaries that have been defined for SHDC at **Appendix M** and for WDBC and **Appendix N** are based on our interpretation of the NPPF and local circumstances.
- 10.5.5 The NPPF is clear in its requirement for the sequential test to be applied and impact assessment to be undertaken when considering applications for main town centres uses that are not in an existing centre and not consistent with an up-to-date Local Plan. However, the NPPF also provides local authorities with flexibility to set its own policies *for the consideration of proposals for main town centre uses that are not in an existing centre and not in accordance with an up-to-date Local Plan*. In our view, the Council should take this opportunity to set its own policies taking into account some of the local circumstances we have identified in this study.
- 10.5.6 In our view, the established NPPF tests for a sequential test and impact assessment should be included in policy, as set out in paragraphs 24 and 26 in the NPPF. But we consider that a further local impact test should be introduced into policy.
- 10.5.7 Finally, it is appreciated that the NPPF provides an opportunity to set a local impact threshold (with the default being 2,500 sqm). The NPPG sets out guidance on the factors to take into account, that in setting a locally appropriate threshold it will be important to consider the following factors:
- Scale of proposals relative to town centres
  - The existing viability and vitality of town centres
  - Cumulative effects of recent developments
  - Whether local town centres are vulnerable
  - Likely effects of development on any town centre strategy
  - Impact on any other planned investment.

- 10.5.8 In our view, 2,500 sqm is a too high for SHDC and WDBC, given the market evidence of smaller convenience stores and the limited size of some of the centres. Potentially developments of less than 2,500 sqm could cause a significant adverse impact of some of the centres within the two authorities, depending on the occupier and location. Using the default would mean such developments would not need an impact assessment under the NPPF.
- 10.5.9 PBA recommend applying a consistent local impact threshold across each authority to ensure that the policy is effective. In PBA's experience, policies which apply different thresholds to different centres within an authority can be difficult to implement in practice.
- 10.5.10 The Ivybridge TCLS previously proposed an impact threshold for Ivybridge town centre at 150 sqm gross based on the average size of units in Ivybridge. However, this threshold has been reviewed in light of the need to have a consistent local impact threshold. PBA have considered the need for a consistent local impact threshold in light of information on the size of existing units, size of out of centre units and the general health of centres across SHDC and WDBC.
- 10.5.11 The health checks in Section 4 and 5 conclude that all centres in SHDC and WDBC are considered to be vital and viable with low vacancy rates well below the current national average. The health checks also reveal that the stock of retail properties in Ivybridge is not representative of all town centres in the study area and, on that basis, the 150 sqm gross threshold is not considered to be appropriate at authority level. Kingsbridge, Totnes, Okehampton and Tavistock all contain a greater number of larger Class A1 retail units which provide between 250 - 500 sqm gross floorspace. Ivybridge contains just 6 of these larger units while Kingsbridge and Totnes both comprise 13 and Okehampton and Tavistock both comprise 15.
- 10.5.12 Monitoring data from April 2012 to September 2016 shows that SHDC received just one planning application for out of centre retail floorspace of 150 sqm gross or less while WDBC did not receive any. However, all applications fell well below the national 2,500 sqm threshold.
- 10.5.13 In light of the above, it is considered that an impact threshold of 250 sqm gross or more increase in floorspace would be appropriate to both SHDC and WDBC given the size and the performance of the town centres.

## 10.6 Monitoring

- 10.6.1 This study provides the authorities with its floorspace needs requirements up to 2034. In order to establish whether the requirements for new floorspace (by type) are being met and more generally to monitor the performance, both authorities should monitor:
- Planning permissions for retail floorspace - by type, amount (sqm gross and net), location and retailer
  - Completions of retail floorspace - by type, amount, location and retailer
  - Mix of uses, including vacancies
  - Health checks of designated centres.

- 10.6.2 The monitoring recommended above is relatively straightforward and should be conducted on a rolling basis for items (i) and (ii) and annually or every two years for items (iii) to (vi). Time series data can thus be produced and continually updated, starting with this study or possibly with earlier work undertaken by the authorities. Contingent on the timetabling of the Local Plan, such updating will prove to be valuable when this evidence is tested at examination in public.
- 10.6.3 This report provides a robust indication of the current position. The recommendations set out in this report may need to be adjusted, in the future, due to changing market conditions, demographic changes and the impact of developments elsewhere. They may also need to be adjusted if standard assumptions, in particular those relating to expenditure growth and e-tailing, change. The role of monitoring is crucial in highlighting changes in the assumptions that underpin this study and we recommend regular monitoring to the Council.

## 11 Glossary

**Benchmark turnover:** turnover of a store if it were to trade at the company average.

**Base year:** the start year for any quantitative analysis; normally the year a household survey is undertaken.

**Catchment area:** this is an area where a centre or store attracts most of its trade.

**Claw back:** this is a catchment area's expenditure that is currently spent outside a catchment, but is encouraged to be spent within a catchment through the development of new floorspace.

**Commercial leisure:** leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls).

**Comparison spending:** spending on non-food items such as clothing, furniture and electrical goods for which some comparison is normally made before purchase.

**Convenience spending:** spending on everyday items such as food, newspapers and drinks, which tend to be purchased regularly.

**Edge of centre:** For retail purposes, a location that is well connected and located within up to 300 metres of the primary shopping area.

**Forecast year(s):** these are the year(s) when growth is forecast and is used to inform policy options.

**Gross floorspace:** the gross external floorspace area of a shop, including storage space and ancillary office space.

**Inflow:** this is expenditure generated from beyond a study area/catchment area that is spent in centres/stores within the study area/catchment area.

**Linked trip:** Combining a visit to a supermarket or other use with a trip to use other shops and services in a nearby town/district/local/village centre.

**Leakage:** this is expenditure within a study area/catchment area that is spent outside the study area/catchment area.

**Market share:** this is the proportion of study area/catchment area's expenditure spent in a centre or store, expressed as a percentage.

**Net floorspace:** the retail sales floorspace of a store, which is normally defined as the area within the store where members of the public have access or from which sales are made.

**Net to gross ratio:** the ratio of net sales floorspace to the total gross external floorspace of the store.

**Outflow:** this is expenditure generated from a study area/catchment area that is spent in centres/stores beyond study area/catchment area boundary.

**Out of centre:** in retail terms a location that is more than 300 metres from the primary shopping area but not necessarily outside the urban area.

**Overtrading:** the amount of turnover in excess of a company benchmark turnover.

**Per capita expenditure:** amount of money per annum spent on a category of goods by one person per year.

**Per capita expenditure growth per annum:** annualised real growth in spending (using constant prices).

**Price base:** the base year of the expenditure data used, which is constant at 2014 prices in this study (note this is different from the base year of the quantitative analysis).

**Primary shopping area:** defined area where retail development is concentrated, typically comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage.

**Primary and secondary frontages:** primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

**Qualitative Need:** floorspace required to improve the provision and distribution of shopping and leisure services to improve choice, meet the needs of the community and promote the vitality and viability of town centres.

**Quantitative Need:** floorspace required to support the projected expenditure growth over the plan period.

**Sales density:** the turnover per sqm of net floorspace achieved by retail floorspace.

**Sales density growth:** the annualised percentage growth in turnover of existing floorspace.

**Special forms of trading:** non-retail spending, including via the internet, mail order, stalls and markets, door-to-door and telephone sales.

**Study area:** this is the area where a study of shopping patterns is based upon; it is normally divided into zones.

**Town centre:** area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses or adjacent to the primary shopping area.

**Under trading:** the amount of turnover below a company benchmark turnover.