North Devon District Council and Torridge District Council

Retail and Leisure Study 2012

Appendices to Report

Project Ref: 26265

Doc Ref: Final

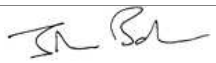
October 2012

Peter Brett Associates LLP
10 Queen Square
Bristol
BS1 4NT
T: 0117 9281560
F: 0117 9281570
E: bristol@peterbrett.com

We print on 100% recycled paper from sustainable suppliers accredited to ISO 14001.

Document Control Sheet

Project Name: **Retail and Leisure Study 2012**
Project Ref: **26265**
Report Title: **Appendices to Report**
Doc Ref: **Final**
Date: **October 2012**

	Name	Position	Signature	Date
Prepared by:	Ed Salter	Senior Consultant		October 2012
Reviewed by:	Mark Felgate	Principal Planner		October 2012
Approved by:	John Baker	Partner		October 2012
For and on behalf of Peter Brett Associates LLP				

Revision	Date	Description	Prepared	Reviewed	Approved
Final	02/10/2012	Final for submission	ES	MF	JB

Peter Brett Associates LLP disclaims any responsibility to the Client and others in respect of any matters outside the scope of this report. This report has been prepared with reasonable skill, care and diligence within the terms of the Contract with the Client and generally in accordance with the appropriate ACE Agreement and taking account of the manpower, resources, investigations and testing devoted to it by agreement with the Client. This report is confidential to the Client and Peter Brett Associates LLP accepts no responsibility of whatsoever nature to third parties to whom this report or any part thereof is made known. Any such party relies upon the report at their own risk.

© Peter Brett Associates LLP 2012

Contents

1 Appendix: Centre Health Checks 1
1.1 Barnstaple 2
1.2 Braunton 8
1.3 Ilfracombe 12
1.4 South Molton 17
1.5 Torridge 22
1.6 Bideford 23
1.7 Atlantic Village 31
1.8 Great Torrington 33
1.9 Holsworthy 41
2 Appendix: Retail Assessment Tables 48
3 Appendix: Leisure and Recreation Assessment Tables 50

Tables

Table A1.1: Floorspace and Retail Units in Barnstaple 2
Table A1.2: Summary of Barnstaple's Retail use and Floorspace 3
Table A1.3: Summary of Braunton's Retail Use 8
Table A1.4: Summary of Ilfracombe's Retail Use and Floorspace 12
Table A1.5: Summary of South Molton's Retail Uses 18
Table A1.6: Floorspace and Retail Units in Bideford 24
Table A1.7: Summary of Bideford's Retail use and Floorspace 24
Table A1.8: Units in Atlantic Village 31
Table A1.9: Summary of Great Torrington's Retail Provision 34
Table A1.10: Summary of Holsworthy's Retail Provision 42

Figures

Figure A1.1: Vacant Units (lower High Street) 4
Figure A1.2: Busy Traffic during the Day 10
Figure A1.3: Ilfracombe Inner Harbour and Quay 14
Figure A1.4: Attractive Victorian Buildings in the Shopping Core 15
Figure A1.5: Bus Station Regeneration Opportunity 16
Figure A1.6: Heritage Rail and Pannier Market 19
Figure A1.7: Assembly Rooms and Pedestrian Entrance to Saint Mary Magdalene Church 20
Figure A1.8: Sainsbury's – Main Convenience Foodstore 21
Figure A1.9: River Torridge (from The Quay) and The Pannier Market 23
Figure A1.10: Bideford Convenience Provision: Mill Street (primary frontages, pedestrianised), Kingsley Road (Edge of Centre), The Quay 25
Figure A1.11: Charity Shop, High Street, Primary Frontage 26
Figure A1.12: Bideford Pannier Market 26
Figure A1.13: Example of a Better Quality Independent Retailer Shop Frontage, Mill Street (left) and Poor Quality Stock (Grenville Street) 27
Figure A1.14: Vacant Shop being Refurbished (Mill Street), Vacant Unit (corner North Road/Mill Street) 28
Figure A1.15: Example of Investment in Property The Quay and Burton Art Gallery 29
Figure A1.16: Bridge Street Car Parks 30
Figure A1.17: Atlantic Village 32
Figure A1.18: Great Torrington Town Centre 34
Figure A1.19: Convenience Store, Edge of Centre 35

Figure A1.20: Quality Independent Comparison Retailer, Refurbishment of Vacant Unit 36
Figure A1.21: Pannier Market 36
Figure A1.22: Vacant Units, Cornmarket Street 38
Figure A1.23: The Plough Arts Centre 38
Figure A1.24: The Shambles Walkway and Mural 40
Figure A1.25: Out of Centre Convenience Provision 40
Figure A1.26: Representation of Retail Provision 42
Figure A1.27: Small Vacant Unit, Edge of Town Centre 44
Figure A1.28: Signage from the Town Centre to National Cycle Route 3, Manor Car Park 45
Figure A1.29: Out of Centre Provision 46

1 Appendix: Centre Health Checks

1.1 Barnstaple

Overview and Background

1.1.1 Barnstaple is one of Devon's largest towns, being second in size to Exeter and similar to Exmouth and Newton Abbot. For its size, the town has a large retail and service centre (compared to Tiverton and Newton Abbot). This in part reflects the rural nature of the economy in North Devon with Barnstaple performing a sub-regional role, serving the retail needs of the wider area, extending to North Cornwall and West Somerset.

1.1.2 Barnstaple, like North Devon as a whole is experiencing modest population growth, above the Devon wide rate. The Council's Draft Core Strategy (2010) indicated that Barnstaple will be planning for around 6,000 new homes (to 2026), almost 60 per cent more than delivered in the previous 15 years to 2011 (3,756 completions 1995-2011). It should be noted however that these figures are currently under review by the Councils.

1.1.3 At the time of writing there are two applications for retail supermarkets, one is relating to a mixed use scheme which includes an ASDA foodstore. The second application is for a Morrisons.

1.1.4 In 2007 the Western Bypass and Downstream Bridge was completed and has greatly improved traffic flow around the town, although some junctions remain at capacity.

1.1.5 As well as Barnstaple town centre there are two local shopping centres at Newport and Pilton and 3 main retail parks (Roundswell, St.Johns and Seven Brethren).

Current Retail Provision

1.1.6 The 2011 GOAD plan of Barnstaple indicates that the town has a total floorspace of 72,320 sqm, marginally higher than the floorspace recorded in 2003 which is detailed in the previous Retail Study (Scott Wilson, 2006). Despite this gain in overall floorspace the number of units recorded in 2011 was fewer at 418 than in 2003 (427). It is important to note that in 2003, GOAD had a greater number of categories in their retail plans, including pubs, hotels, churches, cinema, theatre and community. Therefore the 2011 assessment undercounts this floorspace, indicating a likely increase of more than 787 sqm.

Table A1.1: Floorspace and Retail Units in Barnstaple

Year	Floorspace sqm (gross)	Units
2011	72,320	418
2003	71,533	427

Experian (2011) Goad Plan, Barnstaple

1.1.7 The summary of retail mix in the town centre shows that Barnstaple has a high proportion of A1 comparison units and this is further reinforced when looking at floorspace. Convenience is under-represented, particularly when looking at the floorspace figures where there is less than 50 per cent of the UK average. However, it should be noted that the GOAD plan classifies the M&S store as 100 per cent comparison, while it is known that there is a food hall of roughly 900 sqm within the store which will contribute towards the shortfall for convenience floorspace.

1.1.8 Service uses are also under-represented in the town centre, however, this is difficult to gauge because Goad omits pubs, bars, cinemas, theatres etc., from their classification. Within the service uses, there is a high proportion of estate agents but relative underrepresentation of cafes, take-aways, hair and beauty and laundry/dry cleaners.

Table A1.2: Summary of Barnstaple's Retail use and Floorspace

	No. of Units	% of Units	Index (UK=100)	Total Floor-space	% Floor-space	Index (UK=100)
Convenience	34	8.1%	93.7	5,990	8.3%	48.5
Comparison	198	47.4%	114.4	42,440	58.7%	125.7
Services	121	28.9%	82.4	15,930	22.0%	94.9
Miscellaneous	6	1.4%	123.7	1,180	1.6%	160.0
Vacant	59	14.1%	103.4	6,780	9.4%	78.0
Total	418	100.0%	100.0	72,320	100.0%	100.0

Experian (2011) Goad Plan, Barnstaple

Retailer Representation

1.1.9 Many of the mid-range multiple clothing and footwear retailers are present in Barnstaple such as Next, M&S, Topshop/man, River Island, Dorothy Perkins, Burton, Clarks, and Treads. The budget clothing and footwear retailers are also present such as Primark, Shoe Zone, New Look and M & Co.

1.1.10 Beyond the clothing and footwear sector there are fewer multiples, however many of the high street names are present including Boots, WH Smith, Superdrug, many of the mobile phone retailers, JJB Sports, Argos, Wilkinson, The Body Shop, etc. The MHE retail ranking, which is heavily skewed to the representation of multiple retailers ranks Barnstaple in 201st place within their UK ranking, alongside Halifax, Fareham, Barnsley and Cirencester. The ranking confirms the propensity for 'middle', 'lower middle' and 'value' retailers in Barnstaple amongst the national operators.

1.1.11 The town has a high proportion of independent retailers and many areas bar the prime pitch units on the High Street and in Green Lanes Shopping Centre are mainstay independent businesses. The independent sector provides the variety, especially within the furniture, household goods, gifts and crafts, electrical, hobbies and sports sectors.

1.1.12 Supporting the independent sector is the Pannier Market, located in a central position on the High Street. The Pannier Market operates six days a week, selling a variety of fresh produce, arts and crafts and antiques. Butchers Row, which runs alongside the Pannier Market, is characterised by small independent A1 units, with many specialist butchers, bakers, gift food and deli retailers the 'Row' complements the market, adding character and high quality convenience food to the town centre.

Retailer Requirements and Property Offer

1.1.13 The property offer in Barnstaple is generally for small units with the larger premises often having irregular configuration. Many of the clothing retailers such as Next, Topshop / Topman and River Island trade from smaller units (compared to their national profiles). Conversely this plays well for new retail businesses and existing independents who can negotiate affordable rental deals for smaller, less central premises. The quality of the retail units is generally good, and during the site visits a number of vacant premises were undergoing repair and renovation as well as preparation and fit-out for new retail occupants.

1.1.14 Some areas of the town such as the bottom end of the High Street (south) and units along Queen Street appear to suffer from lower maintenance, not helped by a series of vacancies in need of attention.

1.1.15 In a broader context, the demand from retailers is generally low and has dropped dramatically in the last five years.

Figure A1.1: Vacant Units (lower High Street)

Rental Values and Yields

1.1.16 CoStar Focus publishes data on retail rental values as well as property investment and letting deals. The published information for rental values was last updated in June 2009 and indicated that Zone A rental values were thought to be around £800 per sqm for prime properties. The data indicated a fall from a peak of £970 per sqm between 2006 and 2008. By way of comparison Tiverton had a Zone A rental value of around £430 per sqm (2008), Newton Abbot £645 per sqm (2009) and Exeter £2,000 per sqm (2009).

1.1.17 The approach to Zone A rental valuation is the preferred benchmark technique used by commercial agents, however deals data, such as that supplied by CoStar Focus does not distinguish the different rental values of Zones A, B and C, therefore it can be inconsistent. The deals data for Barnstaple between 2010 and 2012 indicates that the average rental value in the town centre has been around £175 per sqm on average with wide range between £90 per sqm and £380 per sqm depending upon size and location of the premises.

1.1.18 Commercial investment yields are no longer collected and published by the VOA. Recent investment for freehold and leasehold property in Barnstaple indicated yields of between 6% and 8% for prime property on the High Street and upward of this for smaller secondary and tertiary units. British Land bought the Green Lanes Shopping Centre in 2011 for £30m representing a net yield of 8% with Zone A rental values though to be from £540 per sqm to £860 per sqm[1], which is consistent with the CoStar Focus data above.

Vacancy Rates

1.1.19 Vacancy rates during the 2011 Goad survey were marginally above the UK average at 14.1%. However, the PBA health check of the town in March 2012 found that the vacancy rate had dropped to around 13%, with some vacant units being filled for A1, A2 and A3 uses and other units falling into vacancy since the April 2011 Goad survey. Compared to the previous survey in 2003 vacant properties are significantly higher although this is in-line with the national picture which has been affected by the recession. Agent comments have drawn caution to the low level of vacancies in some of the North Devon towns. The retail property market remains unstable and many deals are of a short term or concessionary nature in an effort to get properties let and reduce business rate liabilities.

Evening Economy, Leisure and Tourism

1.1.20 The evening and leisure offer is more limited in Barnstaple, for example there are few pubs or bars and restaurants. The town has a Pizza Express and Prezzo (both on the High Street) and there are numerous independent restaurants scattered around. The Strand has a recent Wetherspoons pub, with a number of cafes and terrace seating along with an enhanced public realm scheme which appears to be well used for leisure time when the weather is good. The location is slightly detached from the main footfall area on the High Street and suffers presently from some poor quality buildings mixed in with the good. Overall this area provides a high quality setting for eating and drinking. Boutport Street is the main focus for pubs whilst there are two nightclubs in the town, on The Strand and Summerland Street.

1.1.21 The Scott Cinema (4 screens) and The Queen's Theatre on Boutport Street provide the core of the town's entertainment offer and the nearby leisure centre and indoor tennis courts over at Seven Brethren service leisure needs near to the town centre. There are also nightclubs on The Strand and Summerland Street.

[1] Shopping Centre (2011) British Land buys in Barnstaple

1.1.22 Tourism is an important part of the North Devon and Torridge economy, with an excellent natural environment including Exmoor National Park. The town is reportedly busy on poor weather days during the tourist season and the general shopping and café/restaurant/bar offer supports many visits to the area as do a range of hotels in the town centre. The town and immediate surrounds is thought to have around 890 bed spaces, mainly in serviced accommodation. Tourists are typically attracted to the paid visitor attractions and seaside towns and villages outside Barnstaple, but many will either use the town as a base and those staying outside will make a day trip to the town to enjoy its heritage, museum, cultural and leisure facilities, shops and services.

Accessibility, Car Parking

1.1.23 The town has reasonably good strategic access via the North Devon Link Road (A361) and the Atlantic Highway (A39), however the remote location and distance to the motorway and mainline rail service is seen as a problem. Within the town connectivity has improved with the Western Bypass, Taw Bridge and town centre improvements[2] .

1.1.24 The Tarka Line to Exeter is North Devon's only rail connection to the strategic network and the line faces problems of poor stock, long journey times and poor integration with bus services at Barnstaple to wider North Devon[3].

1.1.25 Connectivity by foot and cycle is very good. The long distance Tarka Trail cycleway and SW Coastal Footpath both pass through the town centre.

1.1.26 North Devon District Council list 24 public car parks on their website, not including the recently demolished multi-storey car park.

1.1.27 Barnstaple is served by relatively frequent and regular bus services to Bideford, Braunton, Ilfracombe and South Molton, operating along commercially viable 'core' routes with less regular links to a number of surrounding rural villages. Early buses into Barnstaple from surrounding villages are limited.

Environment, Crime and Safety

1.1.28 The whole of the town centre is a Conservation Area, which features good quality architecture and listed buildings throughout most of the town which are mainly in good condition. Some of the buildings and vacant units have fallen into disrepair and it is apparent that the owners do not have the funds to address this.

1.1.29 Some areas of the public realm are of a lower quality or are inconsistent throughout the town, including planters, signage, paving, seating and cycle racks. Some of the new replacement street furniture is different in style (for example The Strand compared with Tuly Street).

[2] North Devon District Council (2011) Barnstaple Town Study.
[3] IBID.

1.1.30 Butchers Row and the Pannier Market exemplify good use (and maintenance) of historic buildings in their traditional use. There are a number of accessible natural greenspaces such as Castle Mound and Church Lane.

1.1.31 There is limited recent information about crime and safety in Barnstaple and the towns of North Devon. The Safer North Devon group published a plan in 2008 that indicated overall levels of crime are low compared to the UK. At the time of publication the group indicated that crime incidence was falling although fear of crime was an issue for some communities. The Police.uk crime maps service identifies crimes on a thematic monthly basis by location. The crime rates in Barnstaple town centre are reported as being above average, however this is largely due to the measurement of crimes per 1,000 people, with few residents in town centres than other areas. The High Street and Boutport Street show higher rates of crime than the rest of the centre. Anti-social behaviour is by far the greatest incident recorded followed by violent crime, criminal damage and arson and theft.

Edge and Out of Centre Provision

1.1.32 Barnstaple has three areas of out of centre retail provision. The nearest to the town centre is Seven Brethren, also known as Barnstaple Retail Park, located across the River Taw from the town centre. It features retail park warehouse style units with representation from Halfords, Maplin, Laura Ashley, Lidl, Pets at Home, Topps Tiles, Pizza Hut, Bensons and PC World. Nearby there is a Tesco Extra and B&Q, both situated in close proximity to the North Devon Leisure Centre, Tarka Tennis Centre and adjoining railway station.

1.1.33 Situated to the West of the town near the A39 is Roundswell Retail Park. The retail park has around 6,000 sqm of retail warehousing including Currys, Staples, Carpet Right, Comet and MacDonald's. Unit 1 was formerly occupied by MFI and is being prepared for Dunelm. There is a Sainsbury's store opposite the retail park.

1.1.34 South East of the town centre along Eastern Avenue and Rose Lane there are a number of standalone retail warehouses which include Homebase, Wickes, Argos, St Johns Garden Centre and Tesco.

Recent Development and Future Plans – Development Sites

1.1.35 There are development opportunities in and to the edge of the town centre for major development. This includes Queen Street and Bear Street public car parks, both identified in the Local Plan for redevelopment, and the Council is undertaking works to bring down the multi-storey car park at one end of the site. This site is seen as particularly important for delivering new retail, commercial, leisure, residential uses including a possible supermarket.

1.1.36 Other sites in the town include the former Cattle Market and land to the rear of lower Boutport Street and Silver Street. The Council is also considering planning applications for an ASDA at the Anchorwood Bank allocation and out-of-centre Morrisons foodstore at Braunton Road.

Summary

1.1.37 Overall the mix of in-centre and edge-of-centre retail provision in the town centre works well. Seven Brethren provides floorspace for those retailers with larger requirements and bulky goods, while the close proximity to the town centre ensures that Barnstaple remains a vital and viable town centre. Improved transport routes have also alleviated traffic pressures to benefit the town. The retail park at Roundswell provides a complementary and not competitive retail offer.

1.1.38 The town boasts a variety of multiple and independent retailers and has managed to avoid the 'clone town' effect, possibly due to the smaller/irregular units sizes and relatively short section of prime pitch units which has prevented a take-over from the mid-market national chain retailers.

1.1.39 The next key challenge will be the redevelopment of the site adjacent to Queen Street and Bear Street, ensuring the right mix of uses can be delivered in a viable way. The town centre would benefit from further leisure and entertainment uses and additional convenience provision.

1.2 Braunton

Overview and Background

1.2.1 Braunton is defined as an Area centre in the 2006 Local Plan. It has a relatively compact shopping core, serving the local community. The village has a population of around 7,800 residents which has been slowly increasing over the last 20 years.

1.2.2 Despite its proximity to Barnstaple, Braunton is the third largest settlement in North Devon although the retail and service offer is very much orientated towards everyday amenity needs given the higher order offer in nearby Barnstaple (8km).

Current Retail Provision

1.2.3 There is no formal Goad plan of Braunton village centre; however the study team collected a tally count of the different units using the GOAD classification.

Table A1.3: Summary of Braunton's Retail Use

	No. of Units	% of Units	Index (UK=100)
Convenience	9	10.5%	120.6
Comparison	36	41.9%	101.1
Services	37	43.0%	122.5
Miscellaneous	1	1.2%	100.2
Vacant	3	3.5%	25.6
Total	86	100.0%	470.0

1.2.4 The village centre has a total of 86 units. Scott Wilson recorded 100 units in 2004; however this included extra use categories such as pubs and community facilities in their totals. The 2004 analysis also estimated a floorspace of 4,383 sqm and there is limited evidence that there has been any considerable change in aggregate retail provision.

1.2.5 The centre is well represented with convenience units and services, with a comparison offering in line with the UK average. The most dominant use in the centre is 'hairdressers, beauty parlours and health centres', with 14 units of this use – mainly hairdressers. There are no traditional men's clothing shops in Braunton, however in reality there is a plentiful supply of men's clothing in the surf shops which are predominantly categorised as 'sports, toys, cycles and hobbies'.

Retailer Representation

1.2.6 Apart from a couple of national food retailers (Co-op and Warrens) the town is almost exclusively served by independent retailers. This is reflective of the functional relationship with Barnstaple. Of note are the two independent food grocery stores, Cawthornes and Bargain Booze Convenience. A range of other local retail business serve the village providing a strong local character.

Retailer Requirements and Property Offer

1.2.7 Historically Braunton has not seen much demand from larger retailers or national operators however the lack of available property also makes it difficult for new retail businesses to find space also. The property offer is also restrictive – Braunton is thought to have the smallest units on average of all the North Devon centres. This tends to favour the local retailers.

Rental Values and Yields

1.2.8 There is very limited information about the rental values and yields in Braunton town centre. Local agents indicate that all of the North Devon centres have seen a dramatic drop in rental values over the last five years and yields sharpening in response.

Vacancy Rates

1.2.9 Braunton has a very low vacancy rate with only three vacant properties observed during the health check visit. This indicates that there is reasonable demand for retail space and two of the three vacant premises were being prepared for new tenants.

Evening Economy, Leisure and Tourism

1.2.10 The village has a strong tourism retail offer, led by the surf shops but backed up by a number of quality cafes and restaurants. The wider village also boasts a range of accommodation space and this is reflected in the town's employment structure. The natural environment is a particular asset for the surrounding area, especially nearby Braunton Burrows and the beaches at Saunton and Croyde – this tends to be the driver for tourist visits to the village centre as well as the Tarka Trail.

1.2.11 The Braunton and district museum is located in the centre and was converted from a former bakehouse. The Museum of British Surfing opened a new exhibition venue in Braunton (Caen Street Car Park) in April 2012.

Environment, Crime and Safety

1.2.12 The village centre generally benefits from a good quality environment with well kept units, reflecting the low level of vacancy and vitality of retailers in Braunton. The centre has few if any poor quality areas in terms of built environment or upkeep. The historic core is a designated Conservation Area and features a number of Grade I and II listed buildings and Saunton Park to the west of the village is a listed Park and Garden.

1.2.13 Air quality in the village centre is relatively poor due to congestion and an Air Quality Management Area is in the process of being designated. There are also a number of 'rat runs' being used through Braunton to avoid congestion in the village centre[4].

Figure A1.2: Busy Traffic during the Day

1.2.14 Braunton features relatively limited crime prevalence, with a rate lower than the District of North Devon and an IMD Crime score ranking in the uppermost quartile of low crime recordings in England[5]. Within the last month 10 crimes were recorded in the town centre area[6].

Accessibility, Car Parking

1.2.15 Braunton is on the main route (A361) between Barnstaple and Ilfracombe. The western bypass has improved accessibility; however it is congestion within the town which remains a problem. Braunton is served by regular bus services to and from Barnstaple and Ilfracombe and surrounding villages. Most operate relatively frequent services between Monday to Saturday, but offer fewer services in the evening and on a Sunday. There is no train service to the area and Braunton remains relatively remote from the strategic rail network[7].

[4] North Devon Council (2011) Braunton Town Study.
[5] IBID
[6] Police.uk – street level crime and ABS in Braunton, February 2012.
[7] North Devon Council (2011) Braunton Town Study.

1.2.16 National Cycle Route 27 (Devon Coast to Coast) starts at Ilfracombe and crosses Devon to Plymouth via Braunton and Barnstaple. The route through Braunton coincides with the Tarka Trail along the disused railway between Barnstaple and Ilfracombe. Whilst access to and along the Tarka Trail is generally good, there are limited opportunities for safe pedestrian and cycle access from Braunton and Wrafton to Braunton Burrows and the beach at Saunton. There is limited cycle parking in the village.

1.2.17 There are two car parks in Braunton, Caen Street and Exeter Road. The Braunton and Wrafton Area Workshop (November 2011) identified a need for more car parking in the village to overcome issues of unauthorised parking.

Edge and Out of Centre Provision

1.2.18 Since the previous 2006 Retail Study a new Tesco store has opened with a net sales area of 1,739 sqm. This has helped to meet the day to day convenience needs of local residents and is used by visitors passing through. The Tesco store is on the outskirts of the village around 1 mile from the centre. It is not envisaged that there is much in the way of linked trips between the two.

Recent Development and Future Plans – Development Sites

1.2.19 Aside from the Tesco development and a number of employment units at Velator Way there has been little retail and village centre development in Braunton. There is scope for some infill housing around the village however no large scale development for town centre uses is envisaged.

1.2.20 Devon County Council have committed funds to complete a missing link of the Tarka Trail between Knowle and Willingcott, near Woolacombe which will join the Tarka Trail to the railway path from Willingcott to Ilfracombe.

Summary

1.2.21 Braunton provides a range of predominantly local shops and services for the local population as well as tourist visitors. Service uses are particularly high in the centre; however the low vacancy rate ensures that there is also a reasonable range of A1 retail, in line with the national average. The Local Plan policy BRA6 seeks to protect A1 uses in the centre whereby 50 per cent A1 must be upheld before any change of use can be considered. It is recommended that this is retained to prevent further growth of service uses.

1.2.22 Traffic congestion is the key detrimental attribute in Braunton and unless a bypass scheme becomes viable this is likely to continue into the future given the 'through road' location to Ilfracombe, Woolacombe and the beaches at Saunton and Croyde.

1.2.23 Overall Braunton is considered to be a vital and viable centre which performs effectively given its size and role.

1.3 Ilfracombe

Overview and Background

1.3.1 Ilfracombe is North Devon's second largest town centre and is identified as an Area Centre in the Local Plan. The coastal town has a population of 11,150 residents and is situated about 19km from Barnstaple. The town expanded during the 19th Century as tourism became a major sector of the local economy with many Victorian buildings and features being established at this time. The town is experiencing modest growth of 3 per cent between 2001 and 2010, but this is lower than the other towns and District of North Devon (5 per cent).

1.3.2 Ilfracombe suffers from a number of structural economic disadvantages associated with unemployment, deprivation and decline in the tourism and manufacturing industries. There is a high proportion of the workforce in low value added retail, wholesale, accommodation, tourism and food service employment sectors. As such there is a need for regeneration and investment in the town as well as sustainable housing.

Current Retail Provision

1.3.3 The Goad plan of Ilfracombe includes a number of areas of the town that are outside of the Local Plan town centre boundary and designated frontages, including the area of Fore Street between the High Street and the Quay and Wilder Road featuring The Promenade. Because of this there is a large amount of secondary and tertiary town centre areas plus residential in the plan.

1.3.4 Of the core town centre uses in **Table A1.4** it can be observed that across this 'wider' town centre area there is a high proportion of service uses, this is dominated by A3 and A5 use class cafes, restaurants and take-aways, particularly around the harbour and Promenade. Not classified by Goad in **Table A1.4** there are also 17 bars and pubs in the town, these are split between the High Street/Church Street and the harbour area of Broad Street and the Quay.

Table A1.4: Summary of Ilfracombe's Retail Use and Floorspace

	No. of Units	% of Units	Index (UK=100)	Total Floor-space	% Floor-space	Index (UK=100)
Convenience	22	9.7%	112.1%	2,850	10.7%	62.8
Comparison	89	39.4%	95.1%	10,060	37.8%	81.1
Services	78	34.5%	98.3%	8,790	33.1%	142.4
Miscellaneous	2	0.9%	76.3%	110	0.4%	40.6
Vacant	35	15.5%	113.5%	4,770	17.9%	149.3
Total	226	100.0%	100.0%	26,580	100.0%	100.0

Experian (2011) Goad Plan, Ilfracombe

1.3.5 There are a reasonable proportion of convenience units and despite an index of just 63 this is skewed downwards by the over-represented café and restaurant offer. Comparison units are slightly under-represented in the town, especially when considering the prevalence of gift shops located around the harbour (Broad St, The Quay and St James Pl) and on the High Street.

1.3.6 It was observed during the town centre visits that some of the shops operate a part time opening and some of the A1 retailers around the harbour area are seasonal only.

Retailer Representation

1.3.7 The town centre has limited presence of multiple retailers aside from amenity specialists such as Lloyds and Superdrug pharmacies, The Original Factory Shop, McCol's and Co-op. The rest of the town includes Tesco and Lidl in addition to independent traders.

Retailer Requirements and Property Offer

1.3.8 The unit sizes in Ilfracombe are small, with an average of 118 sqm across the Goad plan compared to 173 sqm in Barnstaple. The property offer in the town centre along the High Street and Church Street is generally poor, brought down by many unattractive fascias and vacant units which are in poor condition. This is a key area of weakness for Ilfracombe which appears to be widespread or infectious across many tenants, owners and agents of town centre property. As a result the centre either through individual units or as a whole does not offer appealing properties to new businesses or investors.

1.3.9 The harbour area, especially The Quay is very different in this respect. The units are well maintained and smartly presented. As a result it benefits from higher occupancy.

1.3.10 It has not been possible to identify any formal retailer requirements for the town centre. There are a range of vacant units of varying quality on the High Street however the vacancy rate has risen in the town centre since the Goad assessment of 2011 and Council audit in October 2011, indicating limited existing demand.

Rental Values and Yields

1.3.11 There is limited information on retail yields in Ilfracombe. A number of High Street units are currently available to let at within the range of £80-150 per sqm. Yields in Ilfracombe were previously recorded by the VOA at around 10+ per cent and it is likely that this remains the case. Agents indicate a particularly poor rental market for Ilfracombe, which has further deteriorated over the last five years.

Vacancy Rates

1.3.12 Vacancies have risen in Ilfracombe, especially along the High Street and Church Street where in March 2012 there were 31 vacancies, combined with a further five vacancies around the harbour area this equates to a rate of 16%. This is above the UK rate of 13.6% and the highest of the centres in North Devon. The High Street, Church Street and Portland Street experience a vacancy rate of about 20% when considered alone. Agents have commented on the fragility of the retail property market which has seen a rise in low value deals, short and concessionary lets, which may hide the low ebb in demand.

Evening Economy, Leisure and Tourism

1.3.13 Despite a decline in the town's tourism role there is a significant accommodation stock in and near to the town. Over 7,000 bed spaces are thought to be present within close proximity of Ilfracombe. Wilder Road in particular features a number of Victorian and Edwardian hotels. The harbour area is the town's key asset, however the linear nature and lack of connection with the town area has led to the town centre becoming the poor sibling with few of the tourist visitors making linked trips.

Figure A1.3: Ilfracombe Inner Harbour and Quay

1.3.14 The harbour area provides the core of Ilfracombe's quality evening eating and drinking establishments, it is also important for servicing other aspects of tourist's needs and included boat moorings, commercial fishing, accommodation, gift shops and other marine and tourism businesses, the Aquarium and ferry berths (Oldenburg, Waverley and Balmoral).

1.3.15 The Landmark Theatre, Runnymeade Gardens, Ilfracombe Museum and area along Wilder Road make up the core cultural offering in the town and this area includes amusement arcades on The Promenade and has been described as the 'Fun and Sun' part of the town. Despite the relatively short distance to the core shopping area there is limited connectivity which is exacerbated by the steep gradient.

1.3.16 Within the town centre there is a cinema, nightclub and a range of public houses which appear to be more orientated towards local users.

Environment, Crime and Safety

1.3.17 The whole of Ilfracombe town centre is designated as a Conservation Area. The Council's Ilfracombe Town Study (2011) found that the town has a high quality environment, heritage and landscape, but it is in need of economic and social regeneration. There is a need to attract investment into the High Street in order to address this part of the town which lacks the environmental quality of The Quay and Promenade areas. Improved shop units and a reduction in vacant premises would help to address this.

1.3.18 The town has above average crime rates in the Central Ward compared to the District and Devon. Many of the crimes occur in the town centre (High Street and immediate surrounds).

Figure A1.4: Attractive Victorian Buildings in the Shopping Core

Accessibility, Car Parking

1.3.19 Ilfracombe is served by regular bus services to and from Barnstaple and Braunton and surrounding villages. Most operate relatively frequent services between Monday to Saturday, but offer fewer services in the evenings and on a Sunday. There is no train service to the area.

1.3.20 There are a number of car parks within the town centre, seafront and Harbour areas of Ilfracombe. These car parks meet a demand from both residents and tourists throughout the year but particularly during the summer months. The formal car parking areas are preserved for such use through the use of policy TRA8A.

1.3.21 Cycling around town is generally difficult for utility purposes due to the gradients of the town. The long distance Coast to Coast route to Plymouth via Braunton and Barnstaple is likely to be completed shortly with the completion of a remaining section between Willingcott and Knowle (nr Braunton).

1.3.22 Visiting yachts are able to moor in the harbour.

Edge and Out of Centre Provision

1.3.23 There is a Lidl store to the edge of the town centre which opened in 2010. Tesco also operates a medium sized supermarket (1,860 sqm) to the south of the town in an out of centre location. The store opened in May 2006 and thus predated the household survey of the previous retail study. There is no out of centre comparison provision. Both these stores have served to increase the choice and local shopping opportunities for locals.

Recent Development and Future Plans – Development Sites

1.3.24 The town has a desire to grow in order to deliver change and regeneration as a means to kick start the local economy. Regeneration and development of the harbour is proposed to deliver new residential, leisure, retail, employment and enhancement of the specific harbour facilities. It is hoped that this will bring an uplift in added value tourism and employment for the town as well as delivering physical regeneration and increase the harbour's capacity for visiting boats and ferry services. At present there is limited public funding available to kick start the harbour regeneration.

1.3.25 The bus station is also within the harbour area and provides an opportunity for redevelopment and to create better linkages with the town centre. Developers Omnium Ilfracombe Ltd submitted a planning application for 50 flats and four commercial units which was refused by the Council on the grounds of massing and other issues. A subsequent appeal by Omnium was unsuccessful.

Figure A1.5: Bus Station Regeneration Opportunity

Summary

1.3.26 Ilfracombe benefits from a strong Victorian heritage and architecture, with many such buildings making up the fabric of the town centre. The historical development of the commercial offer of the town has created two polar areas of the primary shopping area and the harbour. As such the town centre does not benefit from the visitor economy which is directed toward the harbour and quay – something that is difficult to remedy.

1.3.27 The linear nature of the primary shopping area and abundant vacant and run down premises dictate that the shopping frontages might benefit from consolidation in an effort to create a more focussed core of better quality units and well kept secondary shops offering service uses.

1.3.28 The current priority is to secure the regeneration opportunities and develop better linkages between the shopping core, Wilder Road and harbour areas.

1.4 South Molton

Overview and Background

1.4.1 South Molton like the other centres of Ilfracombe and Braunton is defined as an Area Centre in the Local Plan. South Molton is relatively isolated from the other North Devon settlements and has a population of around 5,000 also serving an extensive rural area. The town has experienced expansion over recent years, not within the town centre but through residential growth and development at Pathfields Business Park to the north of the town. The parish population has grown by over 17% between 2001 to 2010 and the Council is planning for around 1,200 new homes over the plan period to 2031. There is also potential for utilise 11ha of employment land at Pathfields which would include new livestock market facilities (relocated from the town centre) and a rural business centre. This growth will promote a greater self sufficiency, enhanced community facilities and protect the long term vitality and viability of the town.

Current Retail Provision

1.4.2 Like the Braunton health check, there is no Goad plan for South Molton. A tally count of the different Goad classifications has been collected however it has not been possible to supply floorspace estimates for each of the units.

1.4.3 While there are only nine convenience units in the town centre there is a good spread including a bakery, greengrocers, Spar convenience store, two newsagents/confectionary retailers and four butchers, the latter reflecting the rural and agricultural influence of the area. The main convenience store, a Sainsbury's, is located at an edge of centre site.

1.4.4 The 2006 Retail Study indicated that the floorspace attributed to convenience was much lower in percentage terms and around half the national average. This is likely to be the case given that many of the convenience units are small local traders. It was also noted that some of the retailers were not open for business at the time of visits (9-10.30am, March weekday) with some businesses choosing to operate part time opening only.

1.4.5 The comparison offer is dominated by furniture and antique sellers as well as gift and homeware shops. DIY hardware and household goods are also well supplied in the town and The Original Factory Shop has an outlet on East Street. The antiques, furniture and homeware offer is very much a specialty of South Molton and although this is at the expense of other types of retail good, it gives the town a niche role, and many such shops make for interesting browsing for visitors and locals alike. In addition to the retail premises is the Pannier Market which on Thursdays and Saturdays is the hub of the town and brings with it a flurry of activity. In particular the combination with the livestock market on Thursdays makes for a vibrant retail environment which retains a traditional charm.

Table A1.5: Summary of South Molton's Retail Uses

	No. of Units	% of Units	Index (UK=100)
Convenience	9	10.3%	119.2
Comparison	39	44.8%	108.3
Services	32	36.8%	104.8
Miscellaneous	1	1.1%	99.1
Vacant	6	6.9%	50.5
Total	87	100.0%	100.0

1.4.6 Categories of the comparison sector that are poorly represented include men's and mixed clothing stores, booksellers, arts/crafts and stationers and electrical goods.

1.4.7 The town is well supported by a range of service uses, especially banks and A2 financial services such as insurance, accountancy and estate agents. These uses can be found scattered around the town but are particularly prevalent along the north side of East Street and Broad Street/The Square, which dilutes the primary shopping frontage giving rise to the statement in the previous Retail Study (2006) that 'there is no readily identifiable primary shopping area'.

Retailer Representation

1.4.8 The town very much provides a local offer driven by independent retailers and service providers. There is representation from The Original Factory Shop who specialise in household goods for smaller market towns, plus there is Spar next to the Town Hall and a Boots pharmacy.

Retailer Requirements and Property Offer

1.4.9 There is limited information on retailer requirements for South Molton. It is envisaged that the main requirement will be from local independent traders with the exception of smaller amenity retailers such as Boots etc which are already in the town. It is felt that there may be a requirement from some of the large supermarket operators given the previous application from Tesco and longer term plans for growth and new housing.

1.4.10 The properties in South Molton are all narrow and small reflecting the traditional market town. This prevents larger firms with a greater range of products from entering the town. The largest property is on South Street and is occupied by The Original Factory shop.

Rental Values and Yields

1.4.11 There are very few transactions to base rental values and yields upon and they will vary between properties based upon size and location. There are several properties along George Arcade which fetch a rent of £130 per sqm, however these units are very much in a secondary/tertiary location with limited footfall and had five vacant units during the town centre health check visit.

Vacancy Rates

1.4.12 South Molton has a very low vacancy rate, with only 6 empty retail units (7%), five of these being clustered on George Arcade and one on Broad Street.

Evening Economy, Leisure and Tourism

1.4.13 Tourism is thought to be a component of the town's economy but it is not the focus. The town has a number of self catering properties, B&Bs and a number of hotels. The town centre hast a heritage trail and the Pannier Market (Thursdays and Saturdays) provides a focal point for visitors. Just to the north of the town centre is Quince Honey Farm a small tourist attraction which has invested in children's soft play and a café to attract a broader range of family visitors.

1.4.14 Evening and leisure uses are generally lacking in the town especially restaurant and modern drinking establishments. There are a number of cafes which provide a daytime service and four tradition style public houses but little to really stimulate the evening, leisure and social offering.

Figure A1.6: Heritage Rail and Pannier Market

Environment, Crime and Safety

1.4.15 South Molton town centre is designated as a Conservation Area. The town centre retains a medieval street layout with buildings of Georgian and Victorian era from the town's heyday as a centre of wool trade[8]. The shop fronts retain the 19th Century appearance giving the town a historic flavour. Within the centre this high quality and traditional environment is exemplified by the Public/Pannier Market and Assembly Rooms on the south of Broad Street and the Corn Market to the west side of Market Square and the 'island' of three storey 19th Century buildings on East Street.

1.4.16 The rest of the town centre is clean and tidy. There is limited open space provision or areas for children's play in the town centre, although there is an attractive gated link to the grounds of Saint Mary Magdalene's Church from Broad Street.

Figure A1.7: Assembly Rooms and Pedestrian Entrance to Saint Mary Magdalene Church

1.4.17 Crime is reported to be below the North Devon and Devon average and the IMD scores for South Molton indicate that the area is within the top quartile of low crime rate compared to all areas in England.

[8] North Devon Council (2008) South Molton Conservation Area Character Appraisal.

Accessibility, Car Parking

1.4.18 The town is effectively bypassed by the A361 North Devon Link Road and thus while the settlement suffers from isolation; it is accessible and has good vehicle connectivity to Barnstaple, Tiverton and the M5. The town is served by regular bus services to and from Barnstaple, with links to Witheridge, Tiverton and surrounding villages. Most operate relatively frequent services between Monday to Saturday, but offer fewer services in the evenings and on a Sunday.

1.4.19 South Molton is isolated from mainline rail services given that there are limited links to Tiverton Parkway Station by bus and linkages to the train station in Barnstaple are also lacking.

1.4.20 There are no strategic cycle routes or long-distance footpaths passing through South Molton, although there is a public right of way between South Molton and North Molton.

1.4.21 The central car park is the principal area for visitors arriving and accessing the town centre. There is scope to redevelop this area for enhanced town centre uses and it is envisaged that parking provision will not be reduced.

Edge and Out of Centre Provision

1.4.22 The town is served by an edge of centre Sainsbury's, located on New Road which took over and renovated the former Somerfield store in 2009. There is limited out of centre retail although there is Mole Valley Farmers and Bray Valley Wines at Pathfields Industrial Estate.

Figure A1.8: Sainsbury's – Main Convenience Foodstore

Recent Development and Future Plans – Development Sites

1.4.23 The central car park and livestock market provides a regeneration opportunity to expand the town centre and improve the vitality and viability. The outline proposals for this in the Local Plan and 2004 Development Brief indicate that the livestock market will be relocated to Pathfields using money from the sale of the existing site. The previous retail study identified need for a foodstore of around 1,000 sqm plus a range of retail, leisure, residential and community uses including a bus interchange facility.

1.4.24 It is understood that Tesco own adjacent land to the Council's car park and has been in discussion with the Council regarding the purchase of the central car park. Tesco submitted then withdrew an application (30255) for a foodstore in 2005. There is considerable local opposition to develop a foodstore in this location.

Summary

1.4.25 The town has a sleepy feel to it during the week but takes on a busier atmosphere at weekends, serving a wide rural and agricultural hinterland. It retains a traditional built character with many typical market town buildings and interesting fascia's. The town's evening and leisure offer is limited however the town provides a good range of services and amenity retailing (such as chemists, household goods and convenience shops) as well as specialist furniture and antique dealers supplemented by complementary home and gift shops – the South Molton niche. Some areas of the town are looking a little tired and are in need of investment but this is a minority. Overall it is considered that South Molton is vital and viable within the scope of its local service function.

1.5 Torridge

1.5.1 The district of Torridge has a population of just over 65,000. The current and established hierarchy of settlements is as follows[9]:

- Principal Area Centre: Bideford/Northam/Appledore/Westward Ho!
- Area Centre: Great Torrington (with Taddiport) and Holsworthy; and
- Local Centre: Hartland, Bradworthy, Shebbear, Halwill Junction, High Bickington, Winkleigh.

[9] Torridge District Local Plan, Adopted

1.6 Bideford

Overview and Background

1.6.1 The Bideford Town Study[10] states:

'Bideford is a medieval market town straddling the River Torridge.... It is well known for its Pannier Market, the historic Long Bridge that connects East –the-Water with the town centre of Bideford, the port and narrow streets that help define the character of the town'.

Figure A1.9: River Torridge (from The Quay) and The Pannier Market

1.6.2 Bideford is the Principal Area Centre within the district (Torridge District Local Plan 2004). The town fulfils this role, providing the greatest concentration of retail and service provision of the three Area Centres within the District. Of note however is that Bideford is located in the north east of the District and can be considered relatively remote from parts of the wider area. In addition, as noted in paragraph 3.120, it is important to note that Bideford is only 9 miles from Barnstaple. Both of these factors impact upon the town. For example, some of the District's population most distanced from Bideford's provision, access retailing provision in other more accessible towns. Also, the immediate proximity to Barnstaple, a higher order settlement, can have a greater pull in terms of some retail provision.

1.6.3 With an estimated population of 17,000 in 2010, the town is significantly larger than Great Torrington and Holsworthy. When the neighbouring population of Northam (12,000) is added the centre population rises to approximately 29,000. It has experienced a steady growth in population over the last 20 years and is an identified location for continued growth in the emerging Joint Local Plan (in particular to the west of the town). Bideford's designation as an Area Centre is supported by the range of services and facilities it provides. For example, in addition to the retail provision (described further below) it also supports:

- Health: 7 dental practices, 3 Doctor's surgeries, hospital, 5 opticians practices;
- Education: 4 primary schools, 1 college;

[10] Bideford Town Study, Core Strategy Evidence, September 2011

- Leisure and Recreation: Cinema facilities (Bideford College – not in the town centre), sports pitches (5 pitches for football, cricket and rugby), Burton Art Gallery and Museum, library, 5 places of worship.

1.6.4 The primary shopping frontage is concentrated along High Street and Mill Street. The secondary frontage extends along Bridgeland Street to the north of the town centre and Allhalland Street and Grenville Street (the main pedestrianised access route to the Pannier Market) which are both to the south of the town centre. Conservation Areas cover the town centre and parts of East-the-Water.

Current Retail Provision

1.6.5 Within the Principal Centre Bideford/Northam the focus for retail provision is contained in Bideford town centre, in addition to an extended retail offer at Atlantic Village which is an out of centre 'Outlet Centre' approximately 2.5 miles to the west of the town. The Principal Centre and the Outlet Centre provide 217 and 38 retail units respectively.

1.6.6 The 2011 GOAD plan for Bideford shows that the town centre has a total floorspace of 33,940 sqm. This is 8,060 sqm less than in 2003 with the loss of 10 units (as detailed in the Torridge Retail Study 2005). As in the case of Barnstaple, it is important to note that in 2003, GOAD had a greater number of categories in their retail plans, including pubs, hotels, churches, cinema, theatre and community uses. Therefore the 2011 assessment undercounts this floorspace, and could be a reason for the difference (**Table A1.6**).

Table A1.6: Floorspace and Retail Units in Bideford

Year	Floorspace sqm (gross)	Units
2011	33,940	217
2003	42,000	227

Experian (2003 and 2011) Goad Plans, Bideford

1.6.7 A breakdown of Bideford's town centre offer (utilising current GOAD data[11]) is shown in **Table A1.7**.

Table A1.7: Summary of Bideford's Retail use and Floorspace

	No. of Units	% of Units	Index (UK=100)	Total Floor-space (Sq m)	% Floor-space	Index (UK=100)
Convenience	16	7.37%	84.95	2,710	8.0%	46.8
Comparison	107	49.31%	119.13	17,950	52.9%	113.3
Services	70	32.26%	91.88	9,180	27.0%	116.5
Miscellaneous	4	1.84%	158.91	490	1.4%	141.5
Vacant	20	9.22%	67.52	3,610	10.6%	88.5
Total	217	100%		33,940	100%	100

[11] GOAD (Bideford) data, April 2011

1.6.8 The majority of units in Bideford town centre (107 units, almost 50 per cent) provide comparison shopping which equates with 17,950 sq m. This floorspace figure is 53 per cent of the total retail floorspace. This offer is strong when compared to the national average (shown as an Index figure whereby the UK equals 100). This comparison offer is dominated by independent retailers, with a comparatively low representation of national multiples.

1.6.9 Convenience provision accounts for a total of 7.37% of Bideford's retail units - 16 units out of the total 217. These 16 units cover a total floorspace of 2,710 sqm (8% of total floorspace). Bideford town centre has a low convenience retail offer both in terms of the number of units and the floorspace when compared to the UK Index.

1.6.10 Service uses are under-represented in the town centre in terms of the number of units, however using a floorspace analysis this provision is on a par with the UK average.

Figure A1.10: Bideford Convenience Provision: Mill Street (primary frontages, pedestrianised), Kingsley Road (Edge of Centre), The Quay

Retailer Representation

1.6.11 In terms of clothing and footwear retailers, the main national offer is both limited and concentrated in the budget range: M&Co, New Look and Shoe Zone being the main presence on the high street. Other national multiples providers with a presence on the high street include Thorntons, Card Factory, Superdrug, WH Smiths and Subway. The national multiple presence is very limited. The limited national multiple presence is strongly influenced by both the property offer and the presence of Atlantic Village which has a strong national multiple offer (particularly in relation to clothing and footwear).

1.6.12 There is very high presence of independent retailer in Bideford, which includes a small .but notable niche in relation to antiques shops (representing 8 out of the 17 furniture, carpets and textiles units). Arts, crafts and jewellers are particularly notable in the independent provision in the primary frontage. A recent Visitors Survey[12] highlighted that 'visitors liked Bideford for its range of independents shops and its uniqueness.'

1.6.13 A total of 9% of all the comparison retail units (10 of 111 comparison units, or 4.5% of all units) in the town centre are charity shops, many of these are located in Mill Street and High Street which are incorporated in the primary frontage, and Cooper and Allhalland Street which form the secondary frontages.

[12] North Devon Plus Bideford Economic Research, CACI, September 2010

Figure A1.11: Charity Shop, High Street, Primary Frontage

1.6.14 The MHE retail ranking, which is heavily skewed to the representation of multiple retailers ranks Bideford in 731st place within their UK ranking, alongside places such as Bodmin, Saffron Waldon and Ross-on-Wye. The ranking reflects the higher presence of 'value', 'lower' and 'middle' retailers in comparison with national operators.

1.6.15 The town also has a Pannier Market with linked permanent, smaller retail units beneath the market in 'Butchers Row'. The Pannier Market operates on a Tuesday and Saturday. The Pannier Market is located on Grenville Street/Market Place and as such is on the periphery of the town centre – not least due to the steep topography of the hill which lies between it and the town centre. In addition to Pannier Market, a Farmers Market operates from The Quay 2 to 3 times per month selling local produce.

Figure A1.12: Bideford Pannier Market

Retailer Requirements and Property Offer

1.6.16 The property offer in Bideford is mainly that of smaller units, with even the national comparison clothes stores occupying units of a modest size: for example, New Look 280 sqm and M&Co 220 sqm. There are a handful of larger premises (Co-operative Pharmacy, The Original Factory Shop) located on High Street, with other larger units located on the edge of the primary and / on the secondary retail frontage: for example on the corner of Bridgeland/Mill Street and Bridgeland Street itself.

1.6.17 The quality of the retail units and offer is mixed, even within the primary retail usage. There are some notable quality independent retailers who have invested in their shop frontages and displays (particularly along Mill Street). However, there are some areas of the town which have a concentration of lower quality stock, this is particularly evident along Grenville Street and the top end of High Street. This perception is supported by a recent Visitor Survey[13] which highlighted that 'the town was becoming a little run down'.

Figure A1.13: Example of a Better Quality Independent Retailer Shop Frontage, Mill Street (left) and Poor Quality Stock (Grenville Street)

Rental Values and Yields

1.6.18 Commercial Agents operating in the town indicated that the property market continues to suffer during the recession with a reduction in rental values across the board. When there is movement in the market it tends to result from negotiations on price and incentives such as short term contracts, break clauses and concessionary introductory periods.

Vacancy Rates

1.6.19 Bideford has a 9% vacancy rate[14] which is lower than the UK average of 13.65%. It is evident that there are a small number of vacant properties within the primary shopping frontage for sale / lease. There is additional evidence of refurbishment, for example on Mill Street. However, this situation needs to be balanced against the overall situation in relation to rental values (above).

[13] North Devon Plus Bideford Economic Research, CACI, September 2010
[14] GOAD data, April 2011

Figure A1.14: Vacant Shop being Refurbished (Mill Street), Vacant Unit (corner North Road/Mill Street)

Evening Economy, Leisure and Tourism

1.6.20 There is a limited range of evening activity within Bideford, which is focused upon pubs and take away facilities, with a particular concentration along Bridgeland Street and The Quay. Some of the establishments along The Quay have been refurbished and provide terrace seating which links to a view of the riverside environment/port activities.

1.6.21 There are cinema facilities located at Bideford College; however, this is located outside of the town centre (1km to the east of the town centre). This facility operates three nights a week, providing a single screening on Thursday, Friday and Saturday nights.

1.6.22 Victoria Park is located to the north of the town centre, across the Kinsley Road. It provides a range of family facilities including recreational facilities, a children's play area, open-air paddling pool and skateboard park. It can be accessed from the nearby Burton Art Gallery and Museum, which also provides a cafe/restaurant.

1.6.23 Bideford draws tourists that visit the northern Devon coastline, and 'the tourism market plays a big part in the local economy'. The recent CACI Visitor Survey reports that the town is an attraction due to the fact it is picturesque and is set within attractive natural surroundings. This along with the retail offer Bideford has (both in terms of the town centre and Atlantic Village) attracts tourists into the town.

Figure A1.15: Example of Investment in Property The Quay and Burton Art Gallery

Environment, Crime and Safety

1.6.24 There are areas of the town (including Mill Street and The Quay) that have/are experiencing a level of investment in relation to properties and public realm. Most recently the Council has funded the enhancement of Jubilee Square and is planning resurfacing works along Cooper Street and Mill Street.

1.6.25 The riverside provides a key focal point (aided by the presence of the historic Long Bridge) which has been utilised in relation to the public realm improvements along The Quay. There is generally little other green space within the town centre, although there is good access to Victoria Park.

1.6.26 The neighbourhood of Bideford, extending west from the River Torridge to the A39, has an 'average' crime rate[15]: recorded as 9.41 crimes per 1,000 people in January 2012. A more detailed analysis of the crimes recorded over the last year (2011) show that the main crime committed in and around the town centre is that of anti-social behaviour and to a lesser extent violent crime (offences against the person including common assault). The main locations for recorded crime are in/around Bridgeland Street, Cooper Street, New Street and on/near Chingswell Street.

Accessibility and Car Parking

1.6.27 Bideford is accessible by car with a range of car parking facilities located around the town centre (The Pill, The Quay, Bridge Street). T here are good public transport links, with the main provision running along the river front (The Quay) where there are numerous bus stops.

1.6.28 From The Quay, the town centre itself is relatively accessible by foot (e.g. Mill Street, Bridgeland Street, Allhalland Street). High Street, a street within the primary frontage does however have a steep topography and it is this street which provides the main route to the Pannier Market. Also of note, is the issue of traffic movement along High Street during the daytime which appears to be hindered by the presence of larger delivery vehicles.

[15] HMIC: www.police.uk Crime Statistics

Edge and Out of Centre Provision

1.6.29 The focus of out of centre provision is that of Atlantic Village, an out of town Outlet Centre. This is located approximately 3 kilometres from the town centre. This comprises 38 units (including a major foodstore) and is detailed further below.

1.6.30 Other out of centre provision is located at Caddsdown Industrial Estate (Devonshire Pine Showroom) and Clovelly Road Industrial Estate (Value House – Homewares, Plumbase and Tile Wise).

Recent Development and Future Plans – Development Sites

1.6.31 A series of studies have been undertaken to address the future regeneration of the town and to meet the key objectives of:

- Improving the character of Bideford;
- Encouraging more investment in the area;
- Improving the local economy – and town centre vitality and viability; and
- Generating social and community benefits.

1.6.32 To this end a number of regeneration sites have been identified for potential development. These include a prominent town centre site on Bridge Street which covers two car parks (one private and one public – 52 spaces). The Council would prefer development at this site that comprises a mix of residential, car parking and retail. It is however considered that the development of this site may be unviable in the short to medium term.

Figure A1.16: Bridge Street Car Parks

1.6.33 The District Council have prepared a Development Brief for Brunswick Wharf, which is located on the opposite side of the River Torridge to the town centre. The brief provides for the sites redevelopment based on a mixed use redevelopment including residential, retail and leisure.

1.7 Atlantic Village

1.7.1 The out-of-town Outlet Centre Atlantic Village, Clovelly Road, is just under three kilometres from Bideford. The site provides 132,700 sq ft (net) of floorspace in 38 units of varying size. Atlantic Village is open 7 days per week, 9am to 6pm Monday to Friday and 10.30 to 4.30pm on Sundays (ASDA open till 10pm). Late night shopping is provided every Thursday evening throughout the year.

1.7.2 As would be expected in an Outlet Centre, the dominant retail provision is that of comparison shopping: 25 units of 38, 66% of the total number of units. An additional four retailers (10.5% of units) provide convenience shopping. In terms of floorspace however, there is a more balanced position of the convenience/comparison split due to the presence of the foodstore provider ASDA which occupies a floorspace of approximately 33,000 sq ft net / 3,000 sqm. The majority of retailers are multi nationals; the split between retail provision is shown in **Table A1.8**.

1.7.3 Of note is that of the 38 units, 7 are currently vacant (18.4%). The majority of the vacancies have resulted from the recession and multi-national chains going into administration. This vacancy rate is just under 5% higher than the UK (high street) national average. The Outlet Centre is however reported to continue to be fairing well despite this high rate of vacancy with existing tenants performing well. Footfall (measured in terms of the number of cars accessing the site on an annual basis) is increasing. The addition of a major foodstore to the Village's offer has added to this trend and has helped to even out the troughs previously seen in footfall flows, which generally occurred out of the holiday season.

Table A1.8: Units in Atlantic Village

	No. Units	% of units	Index (UK = 100)
Convenience	4	10.5%	121.27
Comparison	25	65.8%	158.95
Services	2	5.3%	14.99
Miscellaneous	0	0%	0.00
Vacant	7	18.4%	134.95
Total	38	100.0%	-

Note: these figures have not been compared to the UK town centre averages as this retail provision is specifically a Factory Outlet Centre, which will change the fundamental make-up of provision

1.7.4 In addition to this retail provision, it is also of note that Atlantic Village provides:

- Access to 'Mall Carts' for local/community businesses;
- A TIC service (part subsidised by Atlantic Village) during the summer months; and
- A family leisure facility on the site: Atlantis Adventure Park. This facility will be lost if retail expansion plans are implemented.

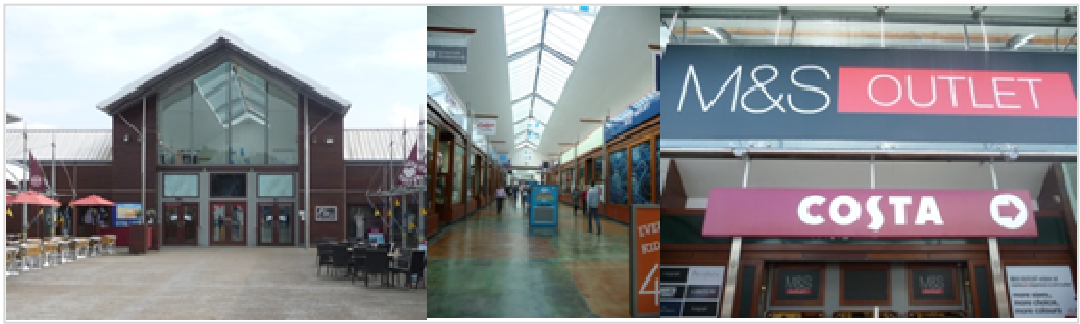
1.7.5 This shopping destination provides a good mix of retailers, in particular it has a strong offer of multi-national comparison clothing stores which fills the gap in provision offered in Bideford town centre.

1.7.6 As with most out-of town retail destinations, the majority of customers visit by private transport (latest figures show that 2.2 million cars enter the car park into the site annually). Extensive parking (700 spaces) meets the needs of car borne customers. There are however also frequent buses that run from / to and via the Outlet Centre. These services are very frequent (half hourly) from Bideford town centre, Appledore and Northam, Monday to Saturday with additional services on a Sunday, frequent to Great Torrington (with a journey time of 45 minutes). Bus services are less frequent to the rural hinterland to the west with approximately 5 buses per day (journey time one hour).

1.7.7 Atlantic Village had a very low level of recorded crime in 2011, with only two incidents being recorded in the location in that year. It is generally considered a very safe area, which is considered to result from on-site security measures (including 24 hour on site security and other crime prevention measures).

1.7.8 The Council has resolved to grant consent for site for the expansion of the retail provision on the site by a further 50,000 sq ft / 4,600 sqm (net). This is subject to the completion of a S106 agreement. The floorspace will be divided across 4 to 8 units, which are of a larger size than provided in the original development. An additional 385 car parking spaces will also be provided. This extension will be built on land currently occupied by the Atlantis Adventure Park.

Figure A1.17: Atlantic Village



Summary

1.7.9 Bideford town centre has a restricted retail offer in as much as it has a very limited national/multiple offer. This is due in part to the size of units available and the presence of Atlantic Village only a few miles from the town centre offering larger unit sizes, free car parking and the additional opportunity to undertake a main food shop all on the same site.

1.7.10 Atlantic Village has a strong comparison offer. It is unclear as to the nature or quantity of linked trips between Atlantic Village and the town centre, however, with a total of 2.2 million cars entering the site annually, it is clear that there is work to be undertaken to help develop the level of connectivity between the two locations. This will be even more of an imperative as the Council will grant consent (subject to a S106 agreement) for the expansion of the Outlet Centre.

1.7.11 The draw of national multiples to Atlantic Village does however mean that the town centre itself has a strong independent representation (suited to the property offer, with an ability to compete for units). This is a notable strength which should be built upon to develop a retail offer that is attractive to both visitors and residents.

1.7.12 Within Bideford town centre there is a concentration of antiques shops, arts, crafts and jewellers which provides interest to the retail offer and is a potential draw for tourists. There is a small number of independent retailers (for example Mill Street) who are investing in property and developing attractive shop frontages. The continuing development of a unique and quality offer within the town centre is seen as the future focus and is supported by the Bideford Chamber of Commerce in its 2011 'Vision for Bideford'.

1.7.13 There are a number of regeneration sites, including at Bridge Street and Brunswick Wharf that could provide possible future retailing and leisure development opportunities.

1.8 Great Torrington

1.8.1 Great Torrington, defined as an Area Centre[16] is the next largest settlement after Bideford and is located only 7 miles from the Principal Centre and 12 miles from the sub-regional centre at Barnstaple. It is a well established market town and has a number of historic buildings and a Conservation Area that covers the core of the town centre which dates back to medieval times.

1.8.2 The town 'has grown steadily over the last 20 years'[17] reaching an estimated 5,700 people in 2010.

1.8.3 As an Area Centre Great Torrington acts as a key service centre for its community and hinterland. In addition to its retail provision which is described in more detail below, it provides a range of services and facilities including:

- Health: 2 health centres, a cottage hospital, 2 dental surgeries;
- Education: Infant and nursery school, Junior School and Community College;
- Leisure and recreation: swimming pool, Sports Hall / all weather pitch accessible via Torrington School Sports College, library, 2 sport fields, Town Hall and 5 places of worship, Plough Arts Centre.

[16] Torridge Local Plan, 2006
[17] Great Torrington Town Study, Core Strategy Evidence, September 2011

1.8.4 The main retail area is relatively concentrated and is located around a central block (High Street, Fore Street, Cornmarket Street and west of South Street), with High Street and Fore Street providing the primary frontages. A Conservation Area covers the town centre.

Figure A1.18: Great Torrington Town Centre

Current Retail Provision

1.8.5 The town centre is of a moderate size with a relatively small number of retail premises compared to Bideford: 73[18] compared with 217.

1.8.6 A breakdown of the town centre offer, based upon the GOAD classification, is shown in **Table A1.9**.

Table A1.9: Summary of Great Torrington's Retail Provision

	Number of Units	% of units	Index (UK=100)
Convenience	10	13.70%	157.82
Comparison	34	46.58%	112.53
Services	19	26.03%	74.13
Miscellaneous	4	5.48%	472.37
Vacant	6	8.22%	60.21
Total	73	100.0%	

1.8.7 Great Torrington town centre is well represented with convenience units, including 3 green grocers, 2 grocery/foodstores, 2 butchers and a bakery. In addition, there is also a good provision of comparison units (just above the national average).

[18] It is noted that the previous Retail Study (2005) recorded a total of 84 units, however this figure included extra use categories such as pubs and community facilities. These have been excluded in this Retail Study to ensure that PBA collated survey data is as directly comparable with GOAD data for the Principal Centre as possible

1.8.8 Although the number of comparison units is higher than the national average it is evident that this provision does not cover the spectrum of different types of comparison provision. There is a distinct lack of footwear and clothing retailers within the town. The main alternative provision is located in both Bideford and Atlantic Village as well as Barnstaple. Given the hierarchy of the settlements and more importantly their geographical proximity, this is not a surprising situation. The range of comparison shops that is nudging the town's comparison offer just over the national average include: booksellers/arts/crafts, gifts and charity/pet/other comparison stores.

1.8.9 As a consequence of this slightly higher than average convenience and comparison provision, there is a slightly lower provision of services (and vacant units, which is discussed further below) although it is noted that there are adequate banking facilities with 4 of the major banks represented on the high street.

1.8.10 It is noted that in addition to those retail units within the town centre boundary (shown in **Table A1.**) there are also a small number of other retail providers adjacent to/outside of the town centre boundary. These have not been included in the above data, but for reference are: Londis (convenience) and a vacant unit (advertised as comparison provision from April 2012) both on Windy Cross; a charity shop and a tea room on Potacre Street; and a bookshop on Well Street.

Figure A1.19: Convenience Store, Edge of Centre

1.8.11 The mean average size of units was estimated as 45 sqm in 2005. Within the Local Plan town centre boundary there have been no developments in the intervening years that suggest this situation has changed, giving a current GOAD use total floorspace of 3,285 sqm[19]. The only significant recent development is that of an out of centre Lidl foodstore in 2011.

[19] 73 units multiplied by average floorspace of 45 sq m

Retailer Representation

1.8.12 The town centre is dominated by independent retail provision, with two national retailers: the foodstore operator The Co-operative and a Lloyds Pharmacy. In addition there is a chain retailer: SPAR. This position is reflective of the close proximity of the town to Bideford/Atlantic Village where multiple retailers will generally locate to access a wider catchment area and larger premises.

1.8.13 In terms of retailer representation, it is noted that there is a small concentration of good quality independent retail provision along South Street, within the primary frontage, with indication that trade is good (e.g. one store imminently due to expand into a neighbouring vacant unit).

Figure A1.20: Quality Independent Comparison Retailer, Refurbishment of Vacant Unit

1.8.14 The Pannier Market (established in 1842) was completely refurbished in 1999 and is managed by the Great Torrington and District Community Development Trust. This facility enables 13 smaller retailers to trade within the town centre. They house a range of (predominantly) comparison provision. At the southern end of the units is an open area for weekly markets and activities including: twice weekly general markets and a weekly bric-a-brac/collectables market. This is a flexible space and could be utilised to good effect as the Pannier Market entrance is within the primary frontage and provides a main walk-through into the town centre from Castle Car Park. It is an integral and connected part of the town centre.

Figure A1.21: Pannier Market

Retailer Requirements and Property Offer

1.8.15 The property offer in terms of size of units is generally small with some medium sized units (for example The Co-Operative, Home Hardware), but can be considered reasonably varied for a market town of its size. There are also a range of mirco units in the Pannier Market, which would suit start-up enterprises. It has however been noted that due to the current recession there is little movement of retailers out from the Pannier Market which is necessary to release these for new entrants.

1.8.16 The stock itself is varied in terms of quality, there is evidence of investment in shop frontages along South Street. The periphery of the town centre is however in need of investment and general maintenance (for example Well Street).

1.8.17 There is no demand for retail units within the town from multiple retailers. Agents and stakeholders indicate that in the last few years there has been some movement in the retail property market, but this has been in relation to local, independent retailers moving from one property to another and also taking over existing businesses. There are 6 vacant units and it is reported that there is a very small level of interest from local independent retailers, however no actual completions.

Rental Values and Yields

1.8.18 There is very little information about rental values and yields for Great Torrington. Contact with the Great Torrington Chamber of Trade and active local agents suggest that many of the high street retail units are in private ownership are not promoted within the commercial market therefore rental levels can vary and are subject to factors other than market dynamics. In general however, rental levels are affordable as there is not an extensive demand for units. The small number of completions on retail properties in the last few years indicate that rental values stand at about £400 to £450 per month for a property of between 300 and 400 sqm.

Vacancy Rates

1.8.19 Vacancy rates are low in the town, standing at only 6 units (8.22%). This is lower than the national UK average (13.65%) and demonstrates a relative strength of this town centre. However, this is balanced against the fact that there are a small number of the vacant units (on the periphery of the town centre retail area) that have been refurbished, but have remained on the market for more than a year.

Figure A1.22: Vacant Units, Cornmarket Street

Evening Economy, Leisure and Tourism

1.8.20 A key area of provision that Great Torrington hosts is that of a range of tourism facilities. This includes Dartington Crystal, Torrington 1646 Visitor Centre, access to The Tarka Trail and RHS Rosemoor.

1.8.21 In addition, there are a range of local leisure facilities, notably:

- Leisure facilities: incorporating a swimming pool, climbing wall, gym and all weather pitch; and
- The Plough Arts Centre is a significant community facility (charitable company) which provides theatre/cinema, gallery, workshop/dance studio and bar/cafe facilities.

1.8.22 In 2009 the number of users to the Plough Arts Centre was reported as 65,000. The Centre acts as a key focal point within the town centre for leisure provision and is a key driver of the evening economy with evening cinema listings and regular live performances.

Figure A1.23: The Plough Arts Centre

Environment, Crime and Safety

1.8.23 The physical environment of the town centre is generally in good condition and is kept in a clean and attractive state and there is good street signage. The only additional point of note is that there is a more noted level of disrepair and a poorer quality environment along Well Street, to the eastern edge of the town centre.

1.8.24 The wider town setting provides a unique selling point for the town. Being located on a high point the town main car park providing extensive countryside views.

1.8.25 Great Torrington and its wider hinterland has a 'below average' crime rate[20]: recorded as 3.08 crimes per 1,000 people in January 2012. A more detailed analysis of the crimes recorded over the last year (2011) show that a main crime committed in and around the town centre is that of anti-social behaviour. The main locations are in/around Cornmarket Street, Fore Street and High Street.

Accessibility, Car Parking

1.8.26 The town is accessed via the A386 from Okehampton to Bideford (which skirts the northern edge of the town centre), with the B3227 (South Molton/Holsworthy) linking to the A386 to both the east and the west of the town centre and by the B3232 with Barnstaple. It is however possible to miss the three access points into the town due to limited signage. The Great Torrington Chamber of Trade is currently working with the local authority to improve signage.

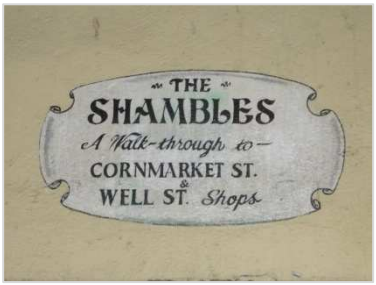
1.8.27 Although there are good public transport links from the surrounding areas the main form of transport into the town is private transport. Bus services to/from Bideford take 20 minutes and run approximately twice per hour, and to/from Barnstaple the journey time is 35 minutes with services running approximately four to five times per hour. Links to other centres and the wider district are more infrequent, for example a 45 minute service is available to Holsworthy 4 times a day.

1.8.28 There are excellent car parking facilities within the town centre: Barley Grove (behind the Pannier Market) 70 spaces, Sydney House (western end of South Street) 280 spaces. In addition there are a further 40 spaces next to the Lidl foodstore, New Street and 40 at School Lane (to the north of the town centre), although these are slightly further from the town centre boundary. All of these facilities are all pay and display car parks. There is some on street parking (free half hour parking) around High Street which was evidenced as being in high demand by customers seeking short term parking. The high demand for these short stay spaces and use of this same section of the highway by delivery vehicles causes congestion.

[20] HMIC: www.police.uk Crime Statistics

1.8.29 The centre is easily accessible from the surrounding residential areas and is easy to navigate through on foot with the ability to reach all shops within a short period of time. This is aided by walkways between streets (for example, The Shambles a cut through from High Street along the side of the Town Hall to Cornmarket Street and the route through the Pannier Market).

Figure A1.24: The Shambles Walkway and Mural



Edge and Out of Centre Provision:

1.8.30 The main retail provision is a Lidl foodstore on New Street, which opened in 2011. The store has a net floorspace of 9,375 sq ft / 871 sqm, and is approximately 550m from the town centre boundary.

Figure A1.25: Out of Centre Convenience Provision

Recent Development and Future Plans – Development Sites

1.8.31 In relation to recent development and future plans, the following are current planning applications :

- New planning proposal to replace an extant planning permission for the erection of a retail foodstore of 1,115 sqm gross floorspace (with associated car parking and highway works) to the north of New Street, opposite the swimming pool. This application was submitted on behalf of the Co-operative in early 2012. It is noted that the Co-op have an existing foodstore within the town centre.

- Bluecoat Primary School (disused): this site has a current planning application for residential properties to the rear of the site. There are no known plans for the school building itself.

Summary

1.8.32 Great Torrington, the second main town within Torridge, is set within a stunning natural environment and has a strong historical and cultural offer for both residents and tourists. It has a good convenience offer (in terms of the number of units) when compared to the national Index. This offer is further supplemented by a Londis store (edge of centre) and a Lidl (within close proximity to the town centre, but an out of centre location). It also has an above average comparison offer, but this is clearly with the notable exception of clothing and footwear which is linked to the proximity of the centre to Bideford and Atlantic Village as well as Barnstaple.

1.8.33 The existence of the Pannier Market directly opposite the primary retail area (with a walkway through to one of the town's main car parks) is a positive feature of the town.

1.8.34 The Plough Arts Centre provides a good cultural offer and is the main feature in relation to drawing people into the town centre in the evenings. Although there are Public Houses, there are limited A3 (food and drink) establishments with an evening offer to supplement this cultural draw.

1.9 Holsworthy

1.9.1 Holsworthy is a well established, compact market town which serves an extensive rural hinterland, the population of which looks to Holsworthy for many of its services and facilities. Located 18 miles from the Principal Centre of Bideford, the town is geographically closer to Bude (9 miles) and Launceston (14 miles).

1.9.2 As a key settlement providing for a large hinterland, Holsworthy provides a wide variety of services and facilities, in addition to retail provision the town also has the following:

- Health: health centre, a hospital, 3 dental surgeries;
- Education: pre-school, primary school, Community College;
- Leisure and recreation: leisure centre, library, sport pitches (2 football, 1 cricket), 2 community halls.

1.9.3 In 2010 the town had a population of 2,795[21], having grown on a relatively steady basis since 1991; 50 people per year, 48% increase.

1.9.4 The main areas are The Square, Fore Street (both incorporating an element of primary frontage), Victoria Street and High Street immediately to the north of this (incorporating secondary frontages) and Stanhope Square and Bodmin Street to the south. A Conservation Area covers the town centre boundary and slightly beyond.

[21] Holsworthy Town Study, Core Strategy Evidence, September 2011

1.9.5 The continued presence of a weekly livestock market has been identified as a key driver for the Holsworthy economy and indeed for its diversity. The prominent and busy Wednesday livestock market (with additional Special Sales) draws farmers and stock from across Devon and Cornwall. The Auctioneers report that over 500 people attend the weekly market, seeing footfall within the town increasing on that day. The livestock market is located on an edge of centre site, with a Waitrose Supermarket (Under Lane) between it and the town centre.

Current Retail Provision

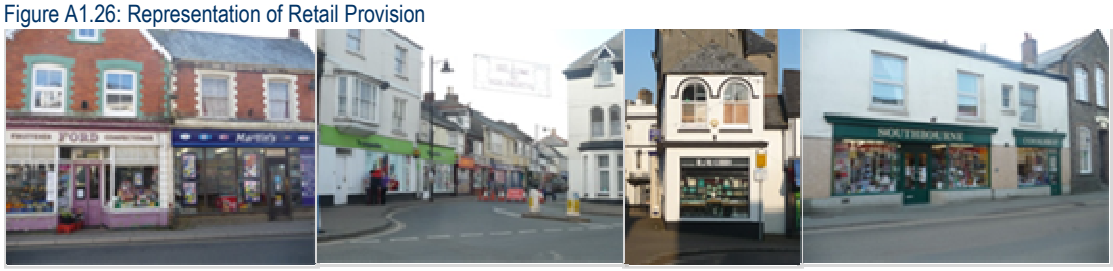
1.9.6 Within Holsworthy town centre there are 74 retail units, it is therefore a moderate size in comparison with to Bideford: (222 units).

1.9.7 A breakdown of the town centre offer, based upon the GOAD classification, is shown in **Table A1.10**.

Table A1.10: Summary of Holsworthy's Retail Provision

	Number of Units	% of units	Index (UK=100)
Convenience	9	12.2%	140.12
Comparison	28	37.8%	91.42
Services	33	44.6%	127.01
Miscellaneous	3	4.1%	349.49
Vacant	1	1.6%	9.90
Total	74	100.0%	-

Figure A1.26: Representation of Retail Provision



1.9.8 The convenience offer is strong (including a bakery, butcher, two greengrocers, supermarket, delicatessen and a healthfood shop), higher than the UK average. This is supported by a weekly Farmers Market held in The Square.

1.9.9 Overall there is a lower percentage of comparison units compared to the national average. Of note is that there are less gifts, books/arts/crafts than in Great Torrington, which may be an indication of the functional nature of the retail offer in Holsworthy, providing for the local population and less for the tourist/visitor market.

1.9.10 There are a small number of charity shops, but not an over concentration. The situation is deceptive as all such shops are located next to each other in The Square and 45% of all retail units accommodate service providers. This is higher than the UK average and reflects the administrative and service role this market town has in relation to its hinterland.

Retailer Representation

1.9.11 There are three multiple retailers present within the town: Co-operative (anchor convenience store), Lloyds Pharmacy and the Original Factory Outlet. There are no multiple clothes retailers; however, there are 3 independent clothes retailers. This is in contrast to the absence of such provision in Great Torrington. This demonstrates that distance from the main centres is a factor in the range of goods available. There are however no footwear retail providers.

1.9.12 Waitrose has taken over the main foodstore unit (previously Somerfield) to the south of the town centre. The presence of this retailer has made a positive impact on footfall within the town.

1.9.13 Consultation with the relevant trade groups does indicate that there is a good take up of units when they become vacant, however, the new shops that have opened are to some extent limiting the retail offer (for example: electrical shop replaced by a hairdressers, shoe shop replaced by a Community Group).

Retailer Requirements and Property Offer

1.9.14 In relation to the property offer, the average size of units was estimated to be 61 sqm (2005 Retail Study). There are no indications that suggest that this situation has changed (i.e. no significant development / addition of new units (or sub division of existing units). The general quality of the property offer is good with some indications that new occupiers of vacated units are investing in their buildings and shop frontages and improving the overall image of the town.

Rental Values and Yields

1.9.15 There is very little information about rental values and yields for Holsworthy. One of the largest units in the town is known to be becoming vacant (due to re-location of the business to Bude). This is a building with a double frontage, a main retail space of £525 sq ft with additional storage rooms over the ground, first and second floors and will be marketed at £1,000 per month.

Vacancy Rates

1.9.16 There is only one, very small unit vacant located on the very edge of the town centre boundary. The vacancy rate is therefore significantly lower than national average and is an indicator of a strong and relatively healthy town centre. Local agents and stakeholders indicate that this situation has changed in the last year whereby the town on first appearance had looked run down with a number of vacancies. However, this situation has now turned around and the town has a much improved image and has a 'buzz' about it.

Figure A1.27: Small Vacant Unit, Edge of Town Centre

Evening Economy, Leisure and Tourism

1.9.17 The town centre has a limited range of evening entertainment for Holsworthy residents and for the wider catchment area. The main provision being that of five Public Houses.

1.9.18 The nearest theatres are located in Great Torrington and Barnstaple, the nearest cinemas /screens in Great Torrington, Bideford and Barnstaple.

1.9.19 Holsworthy is a market town offering general tourism interest to visitors with the specific attraction of the Holsworthy Museum. This tourism appeal is supported by the weekly market and the general footfall increase of livestock market is in operation.

1.9.20 The wider Holsworthy area is located in Ruby Country which is an area promoted as 'undiscovered Devon' by the Ruby Country Partnership. The main tourist appeal is that of outdoor pursuits linked with the countryside around the town. There are no other significant commercial tourist attractions within the Ruby Country and direct tourism benefits to Holsworthy are reported as limited.

Environment, Crime and Safety

1.9.21 The physical environment of Holsworthy town centre is generally in a very good state of repair with no specific areas requiring major attention. The streetscape is well maintained and is kept clean and tidy. There are interesting open spaces contained on the edge of the town centre boundary, for example Badock Gardens, accessed through narrow walkways which provides an interesting addition to the town centre offer.

1.9.22 Holsworthy and its wider hinterland has an 'average' crime rate[22]: recorded as 3.82 crimes per 1,000 people in January 2012. A more detailed analysis of the crimes recorded in Holsworthy town centre over the last year (2011) show that the main areas of concern are anti-social behaviour and burglary. The main locations are in/around the supermarket, Fore Street and Victoria Street.

[22] HMIC: www.police.uk Crime Statistics

Accessibility, Car Parking

1.9.23 In relation to accessibility the following points are noted:

- Private transport: the town itself is the point at which the A388 (Bideford / Launceston) and the A3072 (Bude) join and is reasonably accessible from the hinterland. The town itself is relatively accessible due to the three main access routes. Within the town itself there is congestion during the Wednesday livestock market (on street parking is removed at this time in order to help address this issue).

- Public transport: is described as 'relatively good'[23] to and from the surrounding larger settlements of Bude, Bideford, Barnstaple, Launceston and Exeter (intervals of 2 hourly and five a day to/from these places). It is however noted that those villages that are not on the main bus routes are less frequent served (one or two per day). Evening public transport is even more limited with Holsworthy only being served by the Bude/Exeter service.

- Walking and cycling: Holsworthy is relatively well served by cycle routes leading into the town; with the National Cycle Route (NCR) 3 passing just to the south of the town centre. Walking routes into and around the town are good with relatively easy access from the majority of residential development which is concentrated to the west and north of the centre.

Figure A1.28: Signage from the Town Centre to National Cycle Route 3, Manor Car Park

1.9.24 There are 166 parking bays provided by the District Council in the main car park at Manor Car Park (located on the northern edge of the town centre). A further 92 spaces are provided at Well Park Car park (located behind Manor Car Park). There is additional parking on The Square (central town centre location) which is not available on market days.

[23] Holsworthy Town Study, Core Strategy Evidence, September 2011

Edge and Out of Centre Provision

1.9.25 The town's main convenience provision is located in an edge of centre location; a Waitrose foodstore to the south of the town (opened in June 2009, replacing a former Somerfield). At the time of the last Retail Study (2005), there was expenditure leakage to the higher order centre's of Bideford and Barnstaple.

1.9.26 In addition, and also in close proximity to the Waitrose store is a small complex housing a Cornwall Farmers and Mole Valley Farmers (Under Lane).

Figure A1.29: Out of Centre Provision

Recent Development and Future Plans – Development Sites

1.9.27 In relation to recent development and future plans, the following are noted:

- Proposals have been developed for an agri-business Centre and re-located livestock market to the north of the town; and
- The existing livestock market site will be redeveloped following the commencement of operations at the new agri-business centre. The site is an out of centre location, for which plans have been progressed to secure a mixed use housing and retail scheme. The Livestock Market Site Development Brief advocates the need for a new foodstore *'which would provide for an improved offer, increase the town's competitive edge and claw back leaked expenditure'*.

Other

- Issues of relevance to this Study that have been identified through local consultation events include:
- Need for a cinema;
- Need for a skate park;
- Improve sports club facilities;
- Make the town square one way; and
- Provide extra parking in the town centre.

Summary

1.9.28 Holsworthy continues to be an administrative centre for an extensive hinterland and can be considered relatively strong. This is linked to the continuing operation of the livestock market and also distance from Bideford. An indicator of this role and function is the fact the town has a high proportion of service units, including financial services. Holsworthy town centre offer is aimed as residents of the town and the wider hinterland but is also attractive to visitors.

1.9.29 Vacancy rates are very low, although it is noted that one of the towns larger and more prominent premises is due to become vacant (in The Square) and that there is very little retailer interest / demand to date.

1.9.30 The town is busy with relatively good footfall on livestock market days and also when the Farmers Market is operating. The latter is a key strength of the town and utilises a very prominent position. It is reported that the number of stalls could increase if investment is forthcoming via a S106 agreement associated with the proposed re-development of the existing livestock market.

1.9.31 The Development Brief (2011) for the future redevelopment of the livestock Market (following relocation) provides for an additional major foodstore.

2 Appendix: Retail Assessment Tables

North Devon & Torridge Retail and Leisure Study 2012

Table 1 - Population Projections

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total Catchment
2012	42,693	12,450	15,966	45,718	15,006	15,240	15,565	12,777	15,926	17,085	208,426
2017	45,089	13,177	16,925	47,419	15,185	15,699	15,809	12,975	16,601	17,613	216,492
2022	47,697	13,861	17,879	49,420	15,467	16,161	16,217	13,253	17,252	18,160	225,367
2027	50,033	14,515	18,787	51,424	15,739	16,718	16,578	13,521	17,879	18,770	233,964
2032	51,873	14,962	19,477	53,126	15,978	17,107	16,852	13,697	18,279	19,168	240,520
Numeric Change 2012-32	9,180	2,512	3,511	7,408	972	1,867	1,287	920	2,353	2,083	32,094
Percentage Change 2012-32	21.5%	20.2%	22.0%	16.2%	6.5%	12.2%	8.3%	7.2%	14.8%	12.2%	15.4%

NOTES:
Population base and projection data sourced from Experian MMG3.

North Devon & Torridge Retail and Leisure Study 2012

Table 2 - Comparison Goods Expenditure (per capita)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
2010 Experian MMG3 Base	2,905	2,822	2,863	2,872	2,986	2,871	2,925	2,885	3,208	2,818
2012	2,966	2,881	2,923	2,933	3,049	2,932	2,987	2,946	3,276	2,877
2017	3,409	3,311	3,359	3,370	3,504	3,369	3,432	3,385	3,764	3,307
2022	3,952	3,839	3,894	3,907	4,062	3,905	3,979	3,924	4,364	3,833
2027	4,581	4,450	4,515	4,529	4,709	4,527	4,612	4,549	5,059	4,444
2032	5,311	5,159	5,234	5,250	5,459	5,248	5,347	5,274	5,864	5,152
Numeric Change 2012-32	2,344	2,277	2,310	2,318	2,410	2,317	2,360	2,328	2,589	2,274
Percentage Change 2012-32	79.0%	79.0%	79.0%	79.0%	79.0%	79.0%	79.0%	79.0%	79.0%	79.0%

NOTES:
(1) Expenditure data is derived from Experian MMG3 2010 per capita annual comparison goods expenditure estimates (released in 2011).
(2) The 2010 expenditure data has been projected forward to the base year of the study (2012). Per capita expenditure growth is estimated using the forecasts provied by Experian in their September 2011 Retail Planner Birefing Note 9 as follows: 2010-11 = 0.50%; 2011-2012 = 1.60%; 2012-2013 = 2.10%; 2013-2032 = 3.0% per annum.
(3) Experian only forecast to 2028, the same rate of 3.0% per annum is continued to 2032.

All monetary values are held constant at 2010 prices.

North Devon & Torridge Retail and Leisure Study 2012

Table 3 Total Comparison Goods Expenditure & Expenditure Growth

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
Year	**£m**	**£m**	**£m**	**£m**	**£m**	**£m**	**£m**	**£m**	**£m**	**£m**	**£m**
Total 2012 (including SFT)	£126.6	£35.9	£46.7	£134.1	£45.8	£44.7	£46.5	£37.6	£52.2	£49.2	£619.1
2012 SFT (14.6% market share)*	£18.5	£5.2	£6.8	£19.6	£6.7	£6.5	£6.8	£5.5	£7.6	£7.2	£90.4
Total 2012 (excluding SFT)	£108.1	£30.6	£39.9	£114.5	£39.1	£38.2	£39.7	£32.1	£44.6	£42.0	£528.7
Total 2017 (including SFT)	£153.7	£43.6	£56.9	£159.8	£53.2	£52.9	£54.3	£43.9	£62.5	£58.2	£739.0
2017 SFT (17.0% market share)*	£26.1	£7.4	£9.7	£27.2	£9.0	£9.0	£9.2	£7.5	£10.6	£9.9	£125.6
Total 2017 (excluding SFT)	£127.6	£36.2	£47.2	£132.6	£44.2	£43.9	£45.0	£36.5	£51.9	£48.3	£613.4
Total 2022 (including SFT)	£188.5	£53.2	£69.6	£193.1	£62.8	£63.1	£64.5	£52.0	£75.3	£69.6	£891.7
2022 SFT (16.5% market share)*	£31.1	£8.8	£11.5	£31.9	£10.4	£10.4	£10.6	£8.6	£12.4	£11.5	£147.1
Total 2022 (excluding SFT)	£157.4	£44.4	£58.1	£161.2	£52.5	£52.7	£53.9	£43.4	£62.9	£58.1	£744.6
Total 2027 (including SFT)	£229.2	£64.6	£84.8	£232.9	£74.1	£75.7	£76.5	£61.5	£90.4	£83.4	£1,073.1
2027 SFT (16.1% market share)*	£36.9	£10.4	£13.7	£37.5	£11.9	£12.2	£12.3	£9.9	£14.6	£13.4	£172.8
Total 2027 (excluding SFT)	£192.3	£54.2	£71.2	£195.4	£62.2	£63.5	£64.2	£51.6	£75.9	£70.0	£900.4
Total 2032 (including SFT)	£275.5	£77.2	£101.9	£278.9	£87.2	£89.8	£90.1	£72.2	£107.2	£98.7	£1,278.8
2032 SFT (16.1% market share)*	£44.4	£12.4	£16.4	£44.9	£14.0	£14.5	£14.5	£11.6	£17.3	£15.9	£205.9
Total 2032 (excluding SFT)	£231.1	£64.8	£85.5	£234.0	£73.2	£75.3	£75.6	£60.6	£89.9	£82.8	£1,072.9
Growth 2012 - 2032 (excluding SFT)	**£123.0**	**£34.1**	**£45.7**	**£119.5**	**£34.1**	**£37.2**	**£35.9**	**£28.5**	**£45.4**	**£40.9**	**£544.2**

NOTES:
(1) The figures in the above table are the products of multiplying the data presented in Table 1 (population) by Table 2 (per capita comparison goods expenditure), and are in millions of pounds (£m).
* Growth in SFT expenditure is sourced from Experian Retail Planner 9 (September 2011) for the forecast years as a proportion of comparison goods sales taken by SFT trading.

All monetary values are held constant at 2010 prices.

Sub-total

North Devon & Torridge Retail and Leisure Study 2012

Table 4 Comparison Goods Spending Patterns by Zone in 2012 (%)

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %	Total %
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Bideford	25.0%	5.6%	4.7%	2.0%	0.9%	0.9%	0.8%	0.2%	0.8%	2.0%	6.7%
Atlantic Village, Clovelly Road, Bideford	13.2%	1.7%	5.4%	2.6%	1.0%	1.1%	0.9%	0.0%	0.3%	3.7%	4.3%
Other stores / centres in Zone 1	2.7%	0.6%	0.0%	0.3%	0.0%	0.0%	0.2%	0.1%	0.0%	0.0%	0.7%
Sub-total	**40.9%**	**7.8%**	**10.1%**	**4.8%**	**1.9%**	**2.0%**	**1.9%**	**0.3%**	**1.1%**	**5.7%**	**11.6%**
Zone 2 Stores and Centres											
Holsworthy	2.5%	23.7%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	2.2%	2.3%
Other stores / centres in Zone 2	1.0%	1.8%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.4%
Sub-total	**3.6%**	**25.4%**	**2.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.1%**	**2.8%**	**2.7%**
Zone 3 Stores and Centres											
Great Torrington	0.9%	0.4%	14.4%	0.0%	0.0%	0.0%	0.3%	0.0%	0.1%	0.0%	1.3%
Other stores / centres in Zone 3	0.0%	0.0%	0.8%	0.1%	0.0%	0.1%	0.0%	0.1%	0.0%	0.0%	0.1%
Sub-total	**0.9%**	**0.4%**	**15.2%**	**0.1%**	**0.0%**	**0.1%**	**0.3%**	**0.1%**	**0.1%**	**0.0%**	**1.4%**
Zone 4 Stores and Centres											
Barnstaple	33.4%	18.9%	48.6%	59.3%	65.0%	56.8%	48.8%	14.4%	4.6%	13.4%	39.3%
Roundswell Retail Warehouse Park, Barnstaple	7.3%	0.3%	4.9%	11.6%	2.5%	3.9%	4.7%	0.7%	0.3%	0.5%	5.3%
St Johns Retail Warehouse, Barnstaple	2.7%	0.3%	4.7%	8.5%	2.8%	2.7%	6.3%	0.5%	0.3%	0.3%	3.7%
Seven Brethren Retail Warehouse Park, Barnstaple	3.4%	0.8%	1.3%	6.0%	2.8%	2.8%	3.5%	1.3%	0.6%	0.6%	3.0%
Sub-total	1.0%	0.2%	0.6%	1.9%	0.9%	1.7%	0.5%	0.2%	0.0%	0.3%	0.9%
Sub-total	**47.8%**	**20.4%**	**60.1%**	**87.3%**	**74.0%**	**67.8%**	**63.7%**	**17.1%**	**5.8%**	**15.0%**	**52.3%**
Zone 5 Stores and Centres											
Braunton	0.5%	0.0%	0.3%	0.2%	14.4%	0.5%	0.5%	0.0%	0.0%	0.0%	1.3%
Other stores / centres in Zone 5	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.7%	0.0%	0.2%	0.1%
Sub-total	**0.5%**	**0.0%**	**0.3%**	**0.2%**	**14.6%**	**0.5%**	**0.5%**	**0.7%**	**0.0%**	**0.2%**	**1.4%**
Zone 6 Stores and Centres											
Ilfracombe	0.0%	0.0%	0.0%	0.0%	1.4%	19.6%	0.0%	0.0%	0.0%	0.0%	1.5%
Other stores / centres in Zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%	0.3%	0.0%	0.0%	0.2%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.4%**	**22.4%**	**0.0%**	**0.3%**	**0.0%**	**0.0%**	**1.7%**
Zone 7 Stores and Centres											
South Molton	0.0%	0.0%	0.7%	0.6%	0.1%	0.4%	16.1%	1.2%	0.2%	0.0%	1.5%
Other stores / centres in Zone 7	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.1%	0.0%	0.2%	0.0%	0.1%
Sub-total	**0.0%**	**0.0%**	**1.0%**	**0.6%**	**0.1%**	**0.4%**	**16.1%**	**1.2%**	**0.4%**	**0.0%**	**1.6%**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.8%	0.0%	0.0%	0.4%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**6.8%**	**0.0%**	**0.0%**	**0.4%**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0%	1.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	3.4%	0.0%	0.4%
Sub-total	**0.0%**	**1.0%**	**0.0%**	**0.0%**	**0.0%**	**0.1%**	**0.0%**	**0.0%**	**3.4%**	**0.0%**	**0.4%**
Zone 10 Stores and Centres											
Bude	0.6%	5.8%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.5%	50.8%	4.6%
Other stores / centres in Zone 10	0.4%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.2%
Sub-total	**1.0%**	**5.8%**	**0.0%**	**0.1%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.5%**	**52.4%**	**4.8%**
Sub-total for study catchment (zones 1-10)	**94.6%**	**60.8%**	**88.7%**	**93.2%**	**92.0%**	**93.3%**	**82.6%**	**26.5%**	**12.4%**	**76.2%**	**78.2%**
2. Locations outside the study area											
Exeter	2.2%	10.1%	6.8%	2.3%	2.2%	3.1%	6.6%	7.5%	40.2%	6.8%	7.3%
Launceston	0.1%	18.7%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	8.4%	1.9%
Tiverton	0.1%	0.0%	0.0%	0.0%	0.3%	0.0%	5.1%	18.9%	2.5%	0.1%	1.8%
Taunton	0.0%	0.0%	0.3%	0.7%	0.6%	0.7%	1.4%	20.3%	0.3%	0.0%	1.6%
Crediton	0.0%	0.2%	0.5%	0.0%	0.6%	0.0%	0.8%	0.0%	19.1%	0.0%	1.8%
Okehampton	0.1%	1.3%	0.9%	0.0%	0.0%	0.0%	0.1%	0.0%	11.9%	0.0%	1.2%
Other – outside catchment area	2.9%	8.9%	2.5%	3.8%	4.4%	2.9%	3.5%	26.7%	11.9%	8.5%	6.2%
Sub-total for locations outside the study area	**5.4%**	**39.2%**	**11.3%**	**6.8%**	**8.0%**	**6.7%**	**17.4%**	**73.5%**	**87.6%**	**23.8%**	**21.8%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater.
Locations are listed in descending order of market share.

North Devon & Torridge Retail and Leisure Study 2012

Table 5 Comparison Goods Spending Patterns by Zone in 2012 (£)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
	108.1	30.6	39.9	114.5	39.1	38.2	39.7	32.1	44.6	42.0	528.7
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Bideford	27.1	1.7	1.9	2.3	0.3	0.3	0.3	0.1	0.4	0.8	35.2
Atlantic Village, Clovelly Road, Bideford	14.2	0.5	2.1	2.9	0.4	0.4	0.4	0.0	0.1	1.6	22.7
Other stores / centres in Zone 1	3.0	0.2	0.0	0.3	0.0	0.0	0.1	0.0	0.0	0.0	3.6
Sub-total	**44.3**	**2.4**	**4.0**	**5.5**	**0.7**	**0.8**	**0.8**	**0.1**	**0.5**	**2.4**	**61.5**
Zone 2 Stores and Centres											
Holsworthy	2.8	7.2	0.7	0.0	0.0	0.0	0.0	0.0	0.5	0.9	12.1
Other stores / centres in Zone 2	1.1	0.5	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.3	2.0
Sub-total	**3.8**	**7.8**	**0.8**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.5**	**1.2**	**14.1**
Zone 3 Stores and Centres											
Great Torrington	1.0	0.1	5.7	0.0	0.0	0.0	0.1	0.0	0.0	0.0	7.0
Other stores / centres in Zone 3	0.0	0.0	0.3	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Sub-total	**1.0**	**0.1**	**6.1**	**0.1**	**0.0**	**0.0**	**0.1**	**0.0**	**0.0**	**0.0**	**7.5**
Zone 4 Stores and Centres											
Barnstaple	36.1	5.8	19.4	67.9	25.4	21.7	19.4	4.6	2.0	5.6	207.9
Roundswell Retail Warehouse Park, Barnstaple	7.9	0.1	2.0	13.3	1.0	1.5	1.9	0.2	0.1	0.2	28.1
St Johns Retail Warehouse, Barnstaple	2.9	0.1	1.9	9.7	1.1	1.0	2.5	0.1	0.1	0.1	19.6
Sub-total	3.6	0.2	0.5	6.9	1.1	1.1	1.4	0.4	0.3	0.2	15.7
Sub-total	1.1	0.1	0.2	2.2	0.4	0.7	0.2	0.1	0.0	0.1	5.0
Sub-total	**51.7**	**6.3**	**23.9**	**100.0**	**28.9**	**25.9**	**25.3**	**5.5**	**2.6**	**6.3**	**276.3**
Zone 5 Stores and Centres											
Braunton	0.5	0.0	0.1	0.2	5.6	0.2	0.2	0.0	0.0	0.0	6.8
Other stores / centres in Zone 5	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.2	0.0	0.1	0.4
Sub-total	**0.5**	**0.0**	**0.1**	**0.2**	**5.7**	**0.2**	**0.2**	**0.2**	**0.0**	**0.1**	**7.2**
Zone 6 Stores and Centres											
Ilfracombe	0.0	0.0	0.0	0.0	0.6	7.5	0.0	0.0	0.0	0.0	8.0
Other stores / centres in Zone 6	0.0	0.0	0.0	0.0	0.0	1.1	0.0	0.1	0.0	0.0	1.2
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.6**	**8.6**	**0.0**	**0.1**	**0.0**	**0.0**	**9.2**
Zone 7 Stores and Centres											
South Molton	0.0	0.0	0.3	0.7	0.0	0.1	6.4	0.4	0.1	0.0	8.0
Other stores / centres in Zone 7	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.3
Sub-total	**0.0**	**0.0**	**0.4**	**0.7**	**0.0**	**0.1**	**6.4**	**0.4**	**0.2**	**0.0**	**8.3**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.2	0.0	0.0	2.2
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**2.2**	**0.0**	**0.0**	**2.2**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	1.5	0.0	1.9
Sub-total	**0.0**	**0.3**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.5**	**0.0**	**1.9**
Zone 10 Stores and Centres											
Bude	0.6	1.8	0.0	0.1	0.0	0.0	0.0	0.0	0.2	21.3	24.1
Other stores / centres in Zone 10	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	1.2
Sub-total	**1.1**	**1.8**	**0.0**	**0.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.2**	**22.0**	**25.3**
Sub-total for study catchment (zones 1-10)	**102.4**	**18.6**	**35.4**	**106.7**	**35.9**	**35.6**	**32.8**	**8.5**	**5.5**	**32.0**	**413.4**
2. Locations outside the study area											
Exeter	2.4	3.1	2.7	2.6	0.8	1.2	2.6	2.4	17.9	2.9	38.7
Launceston	0.1	5.7	0.1	0.0	0.0	0.0	0.0	0.0	0.8	3.5	10.2
Tiverton	0.1	0.0	0.0	0.0	0.1	0.0	2.0	6.1	1.1	0.1	9.5
Taunton	0.0	0.0	0.1	0.8	0.2	0.3	0.6	6.5	0.1	0.0	8.6
Crediton	0.0	0.1	0.2	0.0	0.2	0.0	0.3	0.0	8.5	0.0	9.3
Okehampton	0.1	0.4	0.4	0.0	0.0	0.0	0.0	0.0	5.3	0.0	6.2
Other – outside catchment area	3.1	2.7	1.0	4.4	1.7	1.1	1.4	8.6	5.3	3.6	32.9
Sub-total for locations outside the study area	**5.8**	**12.0**	**4.5**	**7.8**	**3.1**	**2.5**	**6.9**	**23.6**	**39.0**	**10.0**	**115.3**
Total	**108.1**	**30.6**	**39.9**	**114.5**	**39.1**	**38.2**	**39.7**	**32.1**	**44.6**	**42.0**	**528.7**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater.
Locations are listed in descending order of market share.
All monetary values are held constant at 2010 prices.

North Devon & Torridge Retail and Leisure Study 2012

Table 6 Total Expenditure on Different Categories of Comparison Goods

	Expenditure Category	Expenditure per capita (£)									
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
2010 Experian Base	Clothing & Footwear	£640	£655	£636	£632	£630	£632	£650	£651	£700	£609
	Furniture Carpets and soft furnishings	£324	£315	£313	£320	£346	£313	£325	£329	£364	£309
	DIY & decorating goods	£247	£250	£248	£238	£263	£250	£255	£256	£278	£254
	Electrical Items & Domestic Appliances	£411	£389	£417	£402	£408	£416	£410	£377	£427	£391
	Health, beauty or chemist Items	£314	£249	£282	£323	£335	£303	£287	£279	£320	£297
	Recreation, Sport and Leisure Goods	£471	£472	£474	£466	£485	£474	£485	£485	£539	£477
	Specialist Items (books, CDs, Jewellery, Gifts, China, Glass)	£498	£492	£493	£491	£519	£483	£513	£508	£580	£481
	Total Comparison Goods Expenditure	**£2,905**	**£2,822**	**£2,863**	**£2,872**	**£2,986**	**£2,871**	**£2,925**	**£2,885**	**£3,208**	**£2,818**
2012	Clothing & Footwear	£653	£669	£649	£645	£643	£645	£664	£665	£715	£622
	Furniture Carpets and soft furnishings	£331	£322	£320	£327	£353	£320	£332	£336	£372	£316
	DIY & decorating goods	£252	£255	£253	£243	£269	£255	£260	£261	£284	£259
	Electrical Items & Domestic Appliances	£420	£397	£426	£410	£417	£425	£419	£385	£436	£399
	Health, beauty or chemist Items	£321	£254	£288	£330	£342	£309	£293	£285	£327	£303
	Recreation, Sport and Leisure Goods	£481	£482	£484	£476	£495	£484	£495	£495	£550	£487
	Specialist Items (books, CDs, Jewellery, Gifts, China, Glass)	£508	£502	£503	£501	£530	£493	£524	£519	£592	£491
	Total Comparison Goods Expenditure	**£2,966**	**£2,881**	**£2,923**	**£2,933**	**£3,049**	**£2,932**	**£2,987**	**£2,946**	**£3,276**	**£2,877**

		Total Expenditure (£m) Excluding SFT @ 14.6%										
		Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
2012	Population 2012	42,693	12,450	15,966	45,718	15,006	15,240	15,565	12,777	15,926	17,085	208,426
	Clothing & Footwear	£23.8	£7.1	£8.9	£25.2	£8.2	£8.4	£8.8	£7.3	£9.7	£9.1	116.499
	Furniture Carpets and soft furnishings	£12.1	£3.4	£4.4	£12.8	£4.5	£4.2	£4.4	£3.7	£5.1	£4.6	59.019
	DIY & decorating goods	£9.2	£2.7	£3.5	£9.5	£3.4	£3.3	£3.5	£2.9	£3.9	£3.8	45.572
	Electrical Items & Domestic Appliances	£15.3	£4.2	£5.8	£16.0	£5.3	£5.5	£5.6	£4.2	£5.9	£5.8	73.743
	Health, beauty or chemist Items	£11.7	£2.7	£3.9	£12.9	£4.4	£4.0	£3.9	£3.1	£4.4	£4.4	55.479
	Recreation, Sport and Leisure Goods	£17.5	£5.1	£6.6	£18.6	£6.3	£6.3	£6.6	£5.4	£7.5	£7.1	87.059
	Specialist Items (books, CDs, Jewellery, Gifts, China, Glass)	£18.5	£5.3	£6.9	£19.6	£6.8	£6.4	£7.0	£5.7	£8.1	£7.2	91.373
	Total Comparison Goods Expenditure	**£108.1**	**£30.6**	**£39.9**	**£114.5**	**£39.1**	**£38.2**	**£39.7**	**£32.1**	**£44.6**	**£42.0**	**528.745**

NOTES:

(1) Expenditure data is derived from Experian MMG3 2010 per capita annual comparison goods expenditure estimates (released in 2011).

(2) The 2010 Experian expenditure data has been projected forward to the base year of the study (2012). To do this, a forecast estimate of 0.5% per annum is applied between 2010 and 2011 and 1.60% between 2011 and 2012. Source: Experian Retail Planner Briefing Note 9 - Figure 1b.

All monetary values are held constant at 2010 prices.

North Devon & Torridge Retail and Leisure Study 2012

Table 7a Clothing & Footwear Spending Patterns by Zone in 2012 (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
	%	%	%	%	%	%	%	%	%	%	%
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Atlantic Village, Clovelly Road, Bideford	26.7%	4.7%	11.2%	7.3%	3.6%	5.1%	2.4%	0.0%	1.3%	13.5%	10.1%
Bideford	11.0%	5.9%	4.3%	1.7%	1.2%	1.9%	1.2%	0.8%	1.9%	1.8%	4.0%
Other stores / centres in Zone 1	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.2%
Sub-total	**37.7%**	**10.5%**	**15.5%**	**9.5%**	**4.8%**	**7.0%**	**3.7%**	**1.4%**	**3.3%**	**15.3%**	**14.3%**
Zone 2 Stores and Centres											
Holsworthy	3.0%	14.8%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	1.2%	1.8%
Other stores / centres in Zone 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**3.0%**	**14.8%**	**1.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.6%**	**1.2%**	**1.8%**
Zone 3 Stores and Centres											
Other stores / centres in Zone 3	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Sub-total	**0.0%**	**0.0%**	**1.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.1%**
Zone 4 Stores and Centres											
Barnstaple	44.1%	32.5%	57.2%	75.2%	76.2%	80.8%	60.4%	16.9%	5.2%	30.3%	51.3%
St Johns Retail Warehouse, Barnstaple	0.6%	0.0%	1.2%	2.8%	1.8%	0.0%	2.4%	0.0%	0.0%	0.0%	1.1%
Other stores / centres in Zone 4	3.7%	0.0%	0.0%	2.3%	0.6%	0.0%	4.3%	0.0%	0.6%	0.0%	1.7%
Sub-total	**48.4%**	**32.5%**	**58.4%**	**80.3%**	**78.6%**	**80.8%**	**67.1%**	**16.9%**	**5.8%**	**30.3%**	**54.1%**
Sub-total											
Braunton	0.0%	0.0%	0.0%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Other stores / centres in Zone 5	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**4.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.3%**
Zone 6 Stores and Centres											
Ilfracombe	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other stores / centres in Zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.6%**	**0.6%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.1%**
Zone 7 Stores and Centres											
South Molton	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	7.9%	0.8%	0.0%	0.0%	0.7%
Other stores / centres in Zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**0.0%**	**0.0%**	**1.2%**	**0.0%**	**0.0%**	**0.0%**	**7.9%**	**0.8%**	**0.0%**	**0.0%**	**0.7%**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	0.3%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**4.8%**	**0.0%**	**0.0%**	**0.3%**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.1%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.3%**	**0.0%**	**0.1%**
Zone 10 Stores and Centres											
Bude	0.0%	1.2%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	17.3%	1.5%
Other stores / centres in Zone 10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**0.0%**	**1.2%**	**0.0%**	**0.5%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**17.3%**	**1.5%**
Sub-total for study catchment (zones 1-10)	**89.1%**	**59.1%**	**77.7%**	**90.4%**	**88.1%**	**88.5%**	**78.7%**	**23.9%**	**11.0%**	**64.2%**	**73.2%**
2. Locations outside the study area											
Exeter	4.8%	17.1%	14.3%	7.4%	4.8%	4.5%	13.4%	12.0%	63.2%	13.0%	13.4%
Taunton	0.0%	0.0%	0.0%	0.6%	0.6%	0.6%	1.3%	29.8%	0.7%	0.0%	2.2%
Plymouth	1.2%	7.7%	0.6%	0.0%	1.2%	0.0%	0.0%	0.6%	0.7%	9.2%	1.7%
Tiverton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.9%	11.2%	1.9%	0.0%	1.2%
Launceston	0.0%	8.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	4.9%	0.9%
Other – outside catchment area	4.8%	7.8%	7.4%	1.7%	5.4%	6.4%	1.8%	22.5%	21.9%	8.6%	7.3%
Sub-total for locations outside the study area	**10.9%**	**40.9%**	**22.3%**	**9.6%**	**11.9%**	**11.5%**	**21.3%**	**76.1%**	**89.0%**	**35.8%**	**26.8%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater.
Locations are listed in descending order of market share.

North Devon & Torridge Retail and Leisure Study 2012

Table 7b Clothing & Footwear Spending Patterns by Zone in 2012 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
	23.8	7.1	8.9	25.2	8.2	8.4	8.8	7.3	9.7	9.1	116.5
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Atlantic Village, Clovelly Road, Bideford	6.4	0.3	1.0	1.8	0.3	0.4	0.2	0.0	0.1	1.2	11.8
Bideford	2.6	0.4	0.4	0.4	0.1	0.2	0.1	0.1	0.2	0.2	4.6
Other stores / centres in Zone 1	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.2
Sub-total	**9.0**	**0.8**	**1.4**	**2.4**	**0.4**	**0.6**	**0.3**	**0.1**	**0.3**	**1.4**	**16.6**
Zone 2 Stores and Centres											
Holsworthy	0.7	1.1	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.1	2.1
Other stores / centres in Zone 2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.7**	**1.1**	**0.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.1**	**2.1**
Zone 3 Stores and Centres											
Other stores / centres in Zone 3	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Sub-total	**0.0**	**0.0**	**0.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**
Zone 4 Stores and Centres											
Barnstaple	10.5	2.3	5.1	18.9	6.3	6.8	5.3	1.2	0.5	2.8	59.7
St Johns Retail Warehouse, Barnstaple	0.1	0.0	0.1	0.7	0.1	0.0	0.2	0.0	0.0	0.0	1.3
Other stores / centres in Zone 4	0.9	0.0	0.0	0.6	0.0	0.0	0.4	0.0	0.1	0.0	1.9
Sub-total	**11.5**	**2.3**	**5.2**	**20.2**	**6.5**	**6.8**	**5.9**	**1.2**	**0.6**	**2.8**	**63.0**
Sub-total											
Zone 5 Stores and Centres											
Braunton	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.3
Other stores / centres in Zone 5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.3**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.3**
Zone 6 Stores and Centres											
Ilfracombe	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other stores / centres in Zone 6	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.1
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**
Zone 7 Stores and Centres											
South Molton	0.0	0.0	0.1	0.0	0.0	0.0	0.7	0.1	0.0	0.0	0.9
Other stores / centres in Zone 7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.0**	**0.0**	**0.1**	**0.0**	**0.0**	**0.0**	**0.7**	**0.1**	**0.0**	**0.0**	**0.9**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.3
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.3**	**0.0**	**0.0**	**0.3**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.0**	**0.1**
Zone 10 Stores and Centres											
Bude	0.0	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	1.6	1.8
Other stores / centres in Zone 10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.0**	**0.1**	**0.0**	**0.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.6**	**1.8**
Sub-total for study catchment (zones 1-10)	**21.2**	**4.2**	**6.9**	**22.8**	**7.3**	**7.4**	**6.9**	**1.7**	**1.1**	**5.8**	**85.3**
2. Locations outside the study area											
Exeter	1.2	1.2	1.3	1.9	0.4	0.4	1.2	0.9	6.1	1.2	15.7
Taunton	0.0	0.0	0.0	0.1	0.0	0.1	0.1	2.2	0.1	0.0	2.6
Plymouth	0.3	0.6	0.1	0.0	0.1	0.0	0.0	0.0	0.1	0.8	1.9
Tiverton	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.8	0.2	0.0	1.4
Launceston	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.4	1.1
Other – outside catchment area	1.2	0.6	0.7	0.4	0.4	0.5	0.2	1.6	2.1	0.8	8.5
Sub-total for locations outside the study area	**2.6**	**2.9**	**2.0**	**2.4**	**1.0**	**1.0**	**1.9**	**5.5**	**8.7**	**3.2**	**31.2**
Total	**23.8**	**7.1**	**8.9**	**25.2**	**8.2**	**8.4**	**8.8**	**7.3**	**9.7**	**9.1**	**116.5**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater.
Locations are listed in descending order of market share.
All monetary values are held constant at 2010 prices.

North Devon & Torridge Retail and Leisure Study 2012

Table 7c Furniture, Carpets and Soft Furnishings Spending Patterns by Zone in 2012 (%)

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %	Total %
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Bideford	29.4%	12.3%	7.4%	5.1%	5.5%	1.8%	4.4%	0.0%	1.7%	5.4%	9.8%
Atlantic Village, Clovelly Road, Bideford	12.9%	0.9%	0.8%	1.4%	1.9%	0.0%	0.7%	0.0%	0.0%	0.0%	3.2%
Other stores / centres in Zone 1	2.7%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Sub-total	**45.0%**	**13.2%**	**8.2%**	**8.0%**	**7.4%**	**1.8%**	**5.1%**	**0.0%**	**1.7%**	**5.4%**	**13.9%**
Zone 2 Stores and Centres											
Bradworthy	7.7%	13.5%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.1%	2.9%
Holsworthy	10.0%	12.3%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	1.0%	3.1%
Other stores / centres in Zone 2	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Sub-total	**17.7%**	**26.7%**	**3.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.0%**	**6.1%**	**6.1%**
Zone 3 Stores and Centres											
Great Torrington	0.0%	0.0%	13.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Other stores / centres in Zone 3	0.0%	0.0%	0.0%	0.7%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.2%
Sub-total	**0.0%**	**0.0%**	**13.0%**	**0.7%**	**0.0%**	**0.8%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.2%**
Zone 4 Stores and Centres											
Barnstaple	25.6%	9.9%	40.6%	56.5%	72.8%	52.8%	48.1%	15.7%	6.1%	10.4%	36.2%
Roundswell Retail Warehouse Park, Barnstaple	6.9%	0.0%	11.7%	7.9%	0.8%	5.3%	4.4%	0.0%	0.0%	0.0%	4.8%
St Johns Retail Warehouse, Barnstaple	0.0%	0.0%	5.8%	6.5%	0.8%	7.8%	5.5%	0.0%	0.0%	0.0%	2.9%
Sub-total	1.0%	0.0%	0.0%	5.8%	1.6%	6.1%	0.0%	0.0%	0.0%	0.0%	2.0%
Seven Brethren Retail Warehouse Park, Barnstaple	1.0%	0.0%	0.9%	1.5%	0.8%	1.8%	1.7%	5.1%	0.0%	2.4%	1.4%
Other stores / centres in Zone 4	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Sub-total	**34.4%**	**9.9%**	**58.9%**	**78.9%**	**76.9%**	**73.8%**	**59.8%**	**20.8%**	**6.1%**	**12.8%**	**47.4%**
Zone 5 Stores and Centres											
Braunton	0.0%	0.0%	0.0%	0.0%	0.8%	0.8%	0.0%	0.0%	0.0%	0.0%	0.1%
Other stores / centres in Zone 5	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.8%**	**0.8%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.1%**
Zone 6 Stores and Centres											
Ilfracombe	0.0%	0.0%	0.0%	0.0%	0.0%	10.4%	0.0%	0.0%	0.0%	0.0%	0.7%
Other stores / centres in Zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**10.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.7%**
Zone 7 Stores and Centres											
South Molton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.6%	0.0%	0.0%	0.0%	0.6%
Other stores / centres in Zone 7	0.0%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Sub-total	**0.0%**	**0.0%**	**0.9%**	**0.0%**	**0.0%**	**0.0%**	**7.6%**	**0.0%**	**0.0%**	**0.0%**	**0.6%**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.1%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.1%**	**0.0%**	**0.0%**	**0.1%**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	4.0%	0.0%	0.4%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.0%**	**0.0%**	**0.0%**	**4.0%**	**0.0%**	**0.4%**
Zone 10 Stores and Centres											
Bude	1.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	46.3%	3.9%
Other stores / centres in Zone 10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**1.0%**	**2.1%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**46.3%**	**3.9%**
Sub-total for study catchment (zones 1-10)	**98.1%**	**51.9%**	**84.4%**	**87.6%**	**85.0%**	**88.5%**	**72.5%**	**22.9%**	**13.8%**	**70.4%**	**74.5%**
2. Locations outside the study area											
Exeter	0.8%	6.0%	8.3%	2.2%	0.0%	4.3%	11.7%	7.2%	46.7%	10.4%	8.0%
Bristol	1.0%	0.0%	1.5%	2.9%	3.0%	2.7%	2.4%	9.3%	6.1%	2.0%	2.8%
Taunton	0.0%	0.0%	0.0%	1.5%	3.8%	1.0%	1.7%	24.6%	0.0%	0.0%	2.3%
Tiverton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.9%	18.5%	4.2%	0.0%	2.0%
Launceston	0.0%	19.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	5.1%	1.9%
Okehampton	1.0%	1.2%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	10.6%	0.0%	1.2%
Plymouth	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1.1%
Other – outside catchment area	9.2%	16.2%	4.2%	5.1%	7.1%	3.5%	4.8%	17.6%	12.6%	7.1%	8.1%
Sub-total for locations outside the study area	**11.9%**	**48.1%**	**15.6%**	**12.4%**	**15.0%**	**11.5%**	**27.5%**	**77.1%**	**86.2%**	**29.6%**	**27.6%**
Total	**110.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**102.0%**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater.
Locations are listed in descending order of market share.

North Devon & Torridge Retail and Leisure Study 2012

Table 7d Furniture, Carpets and Soft Furnishings Spending Patterns by Zone in 2012 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
	12.1	3.4	4.4	12.8	4.5	4.2	4.4	3.7	5.1	4.6	59.0
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Bideford	3.5	0.4	0.3	0.7	0.2	0.1	0.2	0.0	0.1	0.2	5.8
Atlantic Village, Clovelly Road, Bideford	1.6	0.0	0.0	0.2	0.1	0.0	0.0	0.0	0.0	0.0	1.9
Other stores / centres in Zone 1	0.3	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Sub-total	**5.4**	**0.5**	**0.4**	**1.0**	**0.3**	**0.1**	**0.2**	**0.0**	**0.1**	**0.2**	**8.2**
Zone 2 Stores and Centres											
Bradworthy	0.9	0.5	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.2	1.7
Holsworthy	1.2	0.4	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0	1.8
Other stores / centres in Zone 2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**2.1**	**0.9**	**0.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.3**	**3.6**
Zone 3 Stores and Centres											
Great Torrington	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6
Other stores / centres in Zone 3	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Sub-total	**0.0**	**0.0**	**0.6**	**0.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.7**
Zone 4 Stores and Centres											
Barnstaple	3.1	0.3	1.8	7.2	3.3	2.2	2.1	0.6	0.3	0.5	21.4
Roundswell Retail Warehouse Park, Barnstaple	0.8	0.0	0.5	1.0	0.0	0.2	0.2	0.0	0.0	0.0	2.8
Sub-total	0.0	0.0	0.3	0.8	0.0	0.3	0.2	0.0	0.0	0.0	1.7
Pottington Industrial Estate, Barnstaple	0.1	0.0	0.0	0.7	0.1	0.3	0.0	0.0	0.0	0.0	1.2
Seven Brethren Retail Warehouse Park, Barnstaple	0.1	0.0	0.0	0.2	0.0	0.1	0.1	0.2	0.0	0.1	0.8
Other stores / centres in Zone 4	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Sub-total	**4.2**	**0.3**	**2.6**	**10.1**	**3.5**	**3.1**	**2.6**	**0.8**	**0.3**	**0.6**	**28.0**
Zone 5 Stores and Centres											
Braunton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Other stores / centres in Zone 5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**
Zone 6 Stores and Centres											
Ilfracombe	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.4
Other stores / centres in Zone 6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.4**	**0.0**	**0.0**	**0.0**	**0.0**	**0.4**
Zone 7 Stores and Centres											
South Molton	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.3
Other stores / centres in Zone 7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.3**	**0.0**	**0.0**	**0.0**	**0.4**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.0**	**0.0**	**0.1**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.2
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.2**	**0.0**	**0.2**
Zone 10 Stores and Centres											
Bude	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.1	2.3
Other stores / centres in Zone 10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.1**	**0.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**2.1**	**2.3**
Sub-total for study catchment (zones 1-10)	**11.8**	**1.8**	**3.7**	**11.2**	**3.8**	**3.7**	**3.2**	**0.8**	**0.7**	**3.2**	**44.0**
2. Locations outside the study area											
Exeter	0.1	0.2	0.4	0.3	0.0	0.2	0.5	0.3	2.4	0.5	4.7
Bristol	0.1	0.0	0.1	0.4	0.1	0.1	0.1	0.3	0.3	0.1	1.6
Taunton	0.0	0.0	0.0	0.2	0.2	0.0	0.1	0.9	0.0	0.0	1.4
Tiverton	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.7	0.2	0.0	1.2
Launceston	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2	1.1
Okehampton	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.7
Plymouth	0.0	0.2	0.0	0.1	0.0	0.0	0.0	0.0	0.1	0.2	0.7
Other – outside catchment area	1.1	0.6	0.2	0.7	0.3	0.1	0.2	0.6	0.6	0.3	4.8
Sub-total for locations outside the study area	**1.4**	**1.6**	**0.7**	**1.6**	**0.7**	**0.5**	**1.2**	**2.8**	**4.4**	**1.4**	**16.3**
Total	**13.3**	**3.4**	**4.4**	**12.8**	**4.5**	**4.2**	**4.4**	**3.7**	**5.1**	**4.6**	**60.2**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater.
Locations are listed in descending order of market share.
All monetary values are held constant at 2010 prices.

North Devon & Torridge Retail and Leisure Study 2012

Table 7e DIY & Decorating Goods Spending Patterns by Zone in 2012 (%)

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %	Total %
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Bideford	9.6%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	2.1%
Other stores / centres in Zone 1	3.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Sub-total	**12.6%**	**0.0%**	**0.0%**	**1.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.7%**	**2.9%**
Zone 2 Stores and Centres											
Holsworthy	1.2%	23.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	5.0%	2.2%
Other stores / centres in Zone 2	1.8%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.5%
Sub-total	**3.0%**	**23.7%**	**1.1%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.6%**	**5.7%**	**2.6%**
Zone 3 Stores and Centres											
Great Torrington	0.0%	1.3%	13.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	1.1%
Other stores / centres in Zone 3	0.0%	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	0.4%
Sub-total	**0.0%**	**1.3%**	**17.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.4%**	**0.6%**	**0.0%**	**1.5%**
Zone 4 Stores and Centres											
Barnstaple	33.5%	7.2%	34.8%	20.0%	51.7%	36.4%	22.2%	8.3%	6.1%	16.3%	24.6%
St Johns Retail Warehouse, Barnstaple	25.2%	3.3%	22.3%	36.9%	13.7%	16.5%	34.6%	3.4%	3.1%	2.8%	20.2%
Seven Brethren Retail Warehouse Park, Barnstaple	20.3%	8.5%	13.7%	30.9%	15.4%	21.6%	16.4%	3.2%	3.7%	3.5%	16.9%
Roundswell Retail Warehouse Park, Barnstaple	3.0%	1.4%	5.2%	4.9%	2.4%	1.8%	3.7%	0.7%	1.2%	2.1%	3.0%
Pottington Industrial Estate, Barnstaple	1.2%	0.0%	1.7%	6.1%	3.0%	0.6%	0.6%	2.0%	0.0%	1.4%	2.2%
Sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.1%
Sub-total	**83.2%**	**20.4%**	**77.7%**	**98.8%**	**86.2%**	**78.1%**	**77.5%**	**17.6%**	**14.2%**	**26.3%**	**67.0%**
Zone 5 Stores and Centres											
Braunton	0.0%	0.0%	0.0%	0.0%	13.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Other stores / centres in Zone 5	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**13.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.0%**
Zone 6 Stores and Centres											
Ilfracombe	0.0%	0.0%	0.0%	0.0%	0.0%	18.8%	0.0%	0.0%	0.0%	0.0%	1.4%
Other stores / centres in Zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.1%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**20.7%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.5%**
Zone 7 Stores and Centres											
South Molton	0.0%	0.0%	0.6%	0.0%	0.6%	0.0%	14.0%	2.0%	1.2%	0.0%	1.4%
Other stores / centres in Zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**0.0%**	**0.0%**	**0.6%**	**0.0%**	**0.6%**	**0.0%**	**14.0%**	**2.0%**	**1.2%**	**0.0%**	**1.4%**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.0%	0.0%	0.0%	0.4%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**7.0%**	**0.0%**	**0.0%**	**0.4%**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0%	0.7%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.2%
Sub-total	**0.0%**	**0.7%**	**0.6%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.2%**	**0.0%**	**0.2%**
Zone 10 Stores and Centres											
Bude	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.5%	2.6%
Other stores / centres in Zone 10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.1%
Sub-total	**0.0%**	**0.6%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**31.2%**	**2.6%**
Sub-total for study catchment (zones 1-10)	**98.8%**	**46.7%**	**97.1%**	**100.0%**	**100.0%**	**98.8%**	**91.5%**	**28.0%**	**17.9%**	**63.8%**	**81.2%**
2. Locations outside the study area											
Launceston	0.6%	42.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	24.8%	4.9%
Tiverton	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	6.0%	25.2%	3.7%	0.0%	2.5%
Exeter	0.0%	2.0%	1.7%	0.0%	0.0%	0.6%	0.0%	4.2%	15.3%	4.3%	2.2%
Okehampton	0.0%	3.3%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	17.7%	0.0%	1.7%
Crediton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.3%	0.0%	1.3%
Sowton Industrial Estate, Exeter	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	10.4%	0.0%	1.1%
Marsh Barton / Stone Lane Retail Park, Exeter	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.6%	0.0%	11.1%	0.0%	1.0%
Other – outside catchment area	0.0%	2.6%	0.0%	0.0%	0.0%	0.6%	1.8%	41.8%	6.7%	7.1%	4.1%
Sub-total for locations outside the study area	**1.2%**	**53.3%**	**2.9%**	**0.0%**	**0.0%**	**1.2%**	**8.5%**	**72.0%**	**82.1%**	**36.2%**	**18.8%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater.
Locations are listed in descending order of market share.

North Devon & Torridge Retail and Leisure Study 2012

Table 7f DIY & Decorating Goods Spending Patterns by Zone in 2012 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
	9.2	2.7	3.5	9.5	3.4	3.3	3.5	2.9	3.9	3.8	45.6
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Bideford	0.9	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	1.0
Other stores / centres in Zone 1	0.3	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.3
Sub-total	**1.2**	**0.0**	**0.0**	**0.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.3**
Zone 2 Stores and Centres											
Holsworthy	0.1	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	1.0
Other stores / centres in Zone 2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
Sub-total	**0.3**	**0.6**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.2**	**1.2**
Zone 3 Stores and Centres											
Great Torrington	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.5
Other stores / centres in Zone 3	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
Sub-total	**0.0**	**0.0**	**0.6**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.7**
Zone 4 Stores and Centres											
Barnstaple	3.1	0.2	1.2	1.9	1.8	1.2	0.8	0.2	0.2	0.6	11.2
St Johns Retail Warehouse, Barnstaple	2.3	0.1	0.8	3.5	0.5	0.5	1.2	0.1	0.1	0.1	9.2
Seven Brethren Retail Warehouse Park, Barnstaple	1.9	0.2	0.5	2.9	0.5	0.7	0.6	0.1	0.1	0.1	7.7
Roundswell Retail Warehouse Park, Barnstaple	0.3	0.0	0.2	0.5	0.1	0.1	0.1	0.0	0.0	0.1	1.4
Sub-total	0.1	0.0	0.1	0.6	0.1	0.0	0.0	0.1	0.0	0.1	1.0
Other stores / centres in Zone 4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**7.6**	**0.6**	**2.7**	**9.4**	**3.0**	**2.6**	**2.7**	**0.5**	**0.5**	**1.0**	**30.5**
Zone 5 Stores and Centres											
Braunton	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.5
Other stores / centres in Zone 5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.5**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.5**
Zone 6 Stores and Centres											
Ilfracombe	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.6
Other stores / centres in Zone 6	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.1
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.7**	**0.0**	**0.0**	**0.0**	**0.0**	**0.7**
Zone 7 Stores and Centres											
South Molton	0.0	0.0	0.0	0.0	0.0	0.0	0.5	0.1	0.0	0.0	0.6
Other stores / centres in Zone 7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.5**	**0.1**	**0.0**	**0.0**	**0.6**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.2
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.2**	**0.0**	**0.0**	**0.2**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**
Zone 10 Stores and Centres											
Bude	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	1.2
Other stores / centres in Zone 10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.2**	**1.2**
Sub-total for study catchment (zones 1-10)	**9.1**	**1.3**	**3.4**	**9.5**	**3.4**	**3.3**	**3.2**	**0.8**	**0.7**	**2.4**	**37.0**
2. Locations outside the study area											
Launceston	0.1	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.9	2.2
Tiverton	0.1	0.0	0.0	0.0	0.0	0.0	0.2	0.7	0.1	0.0	1.1
Exeter	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.1	0.6	0.2	1.0
Okehampton	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.8
Crediton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.6
Sowton Industrial Estate, Exeter	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.5
Marsh Barton / Stone Lane Retail Park, Exeter	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.5
Other – outside catchment area	0.0	0.1	0.0	0.0	0.0	0.0	0.1	1.2	0.3	0.3	1.9
Sub-total for locations outside the study area	**0.1**	**1.4**	**0.1**	**0.0**	**0.0**	**0.0**	**0.3**	**2.1**	**3.2**	**1.4**	**8.6**
Total	**9.2**	**2.7**	**3.5**	**9.5**	**3.4**	**3.3**	**3.5**	**2.9**	**3.9**	**3.8**	**45.6**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater.
Locations are listed in descending order of market share.
All monetary values are held constant at 2010 prices.

North Devon & Torridge Retail and Leisure Study 2012

Table 7g Electrical Items & Domestic Appliances Goods Spending Patterns by Zone in 2012 (%)

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %	Total %
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Bideford	21.7%	2.6%	4.4%	1.4%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	5.3%
Other stores / centres in Zone 1	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.8%
Sub-total	**25.3%**	**2.6%**	**4.4%**	**1.4%**	**0.0%**	**0.7%**	**0.7%**	**0.0%**	**0.0%**	**0.0%**	**6.1%**
Zone 2 Stores and Centres											
Holsworthy	3.0%	59.2%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	1.4%	4.5%
Other stores / centres in Zone 2	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**3.0%**	**59.8%**	**2.8%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.1%**	**1.4%**	**4.5%**
Zone 3 Stores and Centres											
Great Torrington	1.3%	0.0%	10.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
Other stores / centres in Zone 3	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Sub-total	**1.3%**	**0.0%**	**13.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.3%**
Zone 4 Stores and Centres											
Barnstaple	27.0%	8.9%	34.4%	30.0%	64.1%	44.8%	30.6%	15.4%	1.4%	4.8%	27.0%
Roundswell Retail Warehouse Park, Barnstaple	32.0%	1.3%	21.5%	53.1%	15.6%	20.4%	22.2%	5.2%	0.6%	2.0%	24.8%
St Johns Retail Warehouse, Barnstaple	3.0%	0.0%	12.8%	6.8%	0.7%	1.4%	6.5%	0.0%	0.0%	0.0%	3.7%
Seven Brethren Retail Warehouse Park, Barnstaple	3.0%	0.0%	0.0%	5.3%	4.6%	1.6%	7.8%	0.8%	2.0%	0.0%	3.0%
Other stores / centres in Zone 4	1.5%	1.3%	2.8%	0.0%	1.4%	2.4%	0.7%	0.0%	0.0%	1.4%	1.1%
Sub-total	**66.5%**	**11.5%**	**71.5%**	**95.1%**	**86.5%**	**70.6%**	**67.9%**	**21.3%**	**4.0%**	**8.2%**	**59.6%**
Zone 5 Stores and Centres											
Braunton	0.0%	0.0%	0.0%	0.0%	8.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
Other stores / centres in Zone 5	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	1.4%	0.2%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**8.1%**	**0.0%**	**0.0%**	**0.8%**	**0.0%**	**1.4%**	**0.7%**
Zone 6 Stores and Centres											
Ilfracombe	0.0%	0.0%	0.0%	0.0%	1.6%	22.3%	0.0%	0.0%	0.0%	0.0%	1.8%
Other stores / centres in Zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%	0.0%	2.5%	0.0%	0.0%	0.4%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.6%**	**26.3%**	**0.0%**	**2.5%**	**0.0%**	**0.0%**	**2.2%**
Zone 7 Stores and Centres											
South Molton	0.0%	0.0%	0.0%	0.7%	0.0%	0.9%	16.4%	0.8%	0.7%	0.0%	1.6%
Other stores / centres in Zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.7%**	**0.0%**	**0.9%**	**16.4%**	**0.8%**	**0.7%**	**0.0%**	**1.6%**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.1%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.0%**	**0.0%**	**0.0%**	**0.1%**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Zone 10 Stores and Centres											
Bude	0.0%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	74.0%	6.2%
Kilkhampton	3.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.7%	1.6%
Other stores / centres in Zone 10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**3.0%**	**6.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.7%**	**85.6%**	**7.8%**
Sub-total for study catchment (zones 1-10)	**99.2%**	**80.2%**	**92.1%**	**97.2%**	**96.1%**	**98.4%**	**85.0%**	**26.3%**	**7.5%**	**96.6%**	**84.0%**
2. Locations outside the study area											
Exeter	0.0%	2.6%	2.8%	0.0%	0.0%	0.7%	3.3%	6.9%	28.4%	0.7%	3.4%
Crediton	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.6%	0.0%	28.9%	0.0%	2.5%
Launceston	0.0%	14.7%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	2.7%	1.4%
Out of catchment	0.8%	1.3%	0.7%	2.1%	1.6%	0.0%	1.9%	2.7%	3.4%	0.0%	1.4%
Marsh Barton / Stone Lane Retail Park, Exeter	0.0%	1.3%	0.0%	0.0%	0.0%	0.9%	1.3%	0.0%	13.6%	0.0%	1.3%
Tiverton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	18.7%	1.3%	0.0%	1.4%
Minehead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	19.4%	0.0%	0.0%	1.1%
Other – outside catchment area	0.0%	0.0%	1.4%	0.7%	2.3%	0.0%	4.6%	26.0%	14.2%	0.0%	3.4%
Sub-total for locations outside the study area	**0.8%**	**19.8%**	**7.9%**	**2.8%**	**3.9%**	**1.6%**	**15.0%**	**73.7%**	**92.5%**	**3.4%**	**16.0%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater.
Locations are listed in descending order of market share.

North Devon & Torridge Retail and Leisure Study 2012

Table 7h Electrical Items & Domestic Appliances Goods Spending Patterns by Zone in 2012 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
	15.3	4.2	5.8	16.0	5.3	5.5	5.6	4.2	5.9	5.8	73.7
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Bideford	3.3	0.1	0.3	0.2	0.0	0.0	0.0	0.0	0.0	0.0	3.9
Other stores / centres in Zone 1	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6
Sub-total	**3.9**	**0.1**	**0.3**	**0.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**4.5**
Zone 2 Stores and Centres											
Holsworthy	0.5	2.5	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.1	3.3
Other stores / centres in Zone 2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.5**	**2.5**	**0.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.1**	**3.4**
Zone 3 Stores and Centres											
Great Torrington	0.2	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8
Other stores / centres in Zone 3	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2
Sub-total	**0.2**	**0.0**	**0.8**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.0**
Zone 4 Stores and Centres											
Barnstaple	4.1	0.4	2.0	4.8	3.4	2.5	1.7	0.6	0.1	0.3	19.9
Roundswell Retail Warehouse Park, Barnstaple	4.9	0.1	1.2	8.5	0.8	1.1	1.2	0.2	0.0	0.1	18.3
St Johns Retail Warehouse, Barnstaple	0.5	0.0	0.7	1.1	0.0	0.1	0.4	0.0	0.0	0.0	2.8
Seven Brethren Retail Warehouse Park, Barnstaple	0.5	0.0	0.0	0.9	0.2	0.1	0.4	0.0	0.1	0.0	2.2
Sub-total	0.2	0.1	0.2	0.0	0.1	0.1	0.0	0.0	0.0	0.1	0.8
Sub-total	**10.2**	**0.5**	**4.2**	**15.2**	**4.6**	**3.9**	**3.8**	**0.9**	**0.2**	**0.5**	**44.0**
Zone 5 Stores and Centres											
Braunton	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.4
Other stores / centres in Zone 5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.4**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.5**
Zone 6 Stores and Centres											
Ilfracombe	0.0	0.0	0.0	0.0	0.1	1.2	0.0	0.0	0.0	0.0	1.3
Other stores / centres in Zone 6	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.1	0.0	0.0	0.3
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**1.5**	**0.0**	**0.1**	**0.0**	**0.0**	**1.6**
Zone 7 Stores and Centres											
South Molton	0.0	0.0	0.0	0.1	0.0	0.0	0.9	0.0	0.0	0.0	1.1
Other stores / centres in Zone 7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.0**	**0.0**	**0.0**	**0.1**	**0.0**	**0.0**	**0.9**	**0.0**	**0.0**	**0.0**	**1.1**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
Zone 10 Stores and Centres											
Bude	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.3	4.6
Kilkhampton	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	1.2
Other stores / centres in Zone 10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.5**	**0.3**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**5.0**	**5.8**
Sub-total for study catchment (zones 1-10)	**15.2**	**3.4**	**5.3**	**15.6**	**5.1**	**5.4**	**4.7**	**1.1**	**0.4**	**5.6**	**62.0**
2. Locations outside the study area											
Exeter	0.0	0.1	0.2	0.0	0.0	0.0	0.2	0.3	1.7	0.0	2.5
Crediton	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	1.7	0.0	1.8
Launceston	0.0	0.6	0.1	0.0	0.0	0.0	0.0	0.0	0.2	0.2	1.0
Out of catchment	0.1	0.1	0.0	0.3	0.1	0.0	0.1	0.1	0.2	0.0	1.1
Marsh Barton / Stone Lane Retail Park, Exeter	0.0	0.1	0.0	0.0	0.0	0.0	0.1	0.0	0.8	0.0	1.0
Tiverton	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.8	0.1	0.0	1.0
Minehead	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.8
Other – outside catchment area	0.0	0.0	0.1	0.1	0.1	0.0	0.3	1.1	0.8	0.0	2.5
Sub-total for locations outside the study area	**0.1**	**0.8**	**0.5**	**0.4**	**0.2**	**0.1**	**0.8**	**3.1**	**5.5**	**0.2**	**11.8**
Total	**15.3**	**4.2**	**5.8**	**16.0**	**5.3**	**5.5**	**5.6**	**4.2**	**5.9**	**5.8**	**73.7**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater.
Locations are listed in descending order of market share.
All monetary values are held constant at 2010 prices.

North Devon & Torridge Retail and Leisure Study 2012

Table 7i Health, beauty or Chemist Goods Spending Patterns by Zone in 2012 (%)

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %	Total %
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Bideford	50.3%	9.3%	8.9%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	12.2%
Other stores / centres in Zone 1	9.3%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%
Sub-total	**59.6%**	**11.5%**	**8.9%**	**1.1%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.8%**	**14.2%**
Zone 2 Stores and Centres											
Holsworthy	4.4%	43.2%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	5.1%	3.7%
Other stores / centres in Zone 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**4.4%**	**43.2%**	**2.5%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.1%**	**5.1%**	**3.7%**
Zone 3 Stores and Centres											
Great Torrington	2.2%	0.5%	30.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%
Other stores / centres in Zone 3	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**2.2%**	**0.5%**	**31.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.7%**
Zone 4 Stores and Centres											
Barnstaple	25.1%	10.4%	46.5%	78.9%	48.7%	26.6%	34.2%	11.7%	2.9%	4.0%	36.8%
Roundswell Retail Warehouse Park, Barnstaple	3.8%	0.0%	0.6%	10.2%	0.5%	0.0%	1.1%	0.0%	0.0%	0.0%	3.3%
St Johns Retail Warehouse, Barnstaple	0.0%	0.0%	0.0%	3.8%	1.1%	0.0%	2.2%	0.0%	0.0%	0.0%	1.1%
Other stores / centres in Zone 4	1.1%	0.0%	0.0%	4.9%	1.1%	1.1%	0.6%	0.0%	0.0%	0.0%	1.6%
Sub-total	**30.0%**	**10.4%**	**47.2%**	**97.8%**	**51.4%**	**27.7%**	**38.0%**	**11.7%**	**2.9%**	**4.0%**	**42.8%**
Sub-total											
Zone 5 Stores and Centres											
Braunton	0.0%	0.0%	0.0%	0.0%	38.7%	0.0%	0.6%	0.0%	0.0%	0.0%	3.1%
Other stores / centres in Zone 5	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**39.8%**	**0.0%**	**0.6%**	**0.0%**	**0.0%**	**0.0%**	**3.2%**
Zone 6 Stores and Centres											
Ilfracombe	0.0%	0.0%	0.0%	0.0%	6.1%	60.4%	0.0%	0.0%	0.0%	0.0%	4.9%
Other stores / centres in Zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	10.7%	0.0%	0.0%	0.0%	0.0%	0.8%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**6.1%**	**71.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**5.6%**
Zone 7 Stores and Centres											
South Molton	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	47.7%	2.3%	0.0%	0.0%	3.5%
Other stores / centres in Zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%
Sub-total	**0.0%**	**0.0%**	**0.6%**	**0.0%**	**0.0%**	**0.0%**	**48.2%**	**2.3%**	**0.0%**	**0.0%**	**3.6%**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	36.0%	0.0%	0.0%	2.0%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**36.0%**	**0.0%**	**0.0%**	**2.0%**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	14.8%	0.0%	1.2%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**14.8%**	**0.0%**	**1.2%**
Zone 10 Stores and Centres											
Bude	2.2%	8.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	75.1%	6.9%
Other stores / centres in Zone 10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**2.2%**	**8.7%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**75.1%**	**6.9%**
Sub-total for study catchment (zones 1-10)	**98.4%**	**74.3%**	**90.5%**	**98.9%**	**97.2%**	**98.9%**	**86.8%**	**50.0%**	**18.8%**	**87.0%**	**85.9%**
2. Locations outside the study area											
Exeter	1.1%	4.9%	3.8%	0.0%	0.5%	1.1%	3.3%	2.3%	17.7%	2.3%	2.8%
Crediton	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	32.9%	0.0%	2.7%
Tiverton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.8%	23.2%	4.6%	1.1%	2.4%
Okehampton	0.0%	2.7%	3.2%	0.0%	0.0%	0.0%	0.5%	0.0%	24.4%	0.0%	2.3%
Launceston	0.0%	17.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	6.2%	1.4%
Minehead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	19.2%	0.0%	0.0%	1.1%
Other – outside catchment area	0.5%	0.6%	2.5%	1.1%	1.1%	0.0%	0.6%	5.2%	1.1%	3.4%	1.4%
Sub-total for locations outside the study area	**1.6%**	**25.7%**	**9.5%**	**1.1%**	**2.8%**	**1.1%**	**13.2%**	**50.0%**	**81.2%**	**13.0%**	**14.1%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater.
Locations are listed in descending order of market share.

North Devon & Torridge Retail and Leisure Study 2012

Table 7j Health, beauty or Chemist Goods Spending Patterns by Zone in 2012 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
	11.7	2.7	3.9	12.9	4.4	4.0	3.9	3.1	4.4	4.4	55.5
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Bideford	5.9	0.3	0.4	0.1	0.0	0.0	0.0	0.0	0.0	0.1	6.7
Other stores / centres in Zone 1	1.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1
Sub-total	**7.0**	**0.3**	**0.4**	**0.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**7.9**
Zone 2 Stores and Centres											
Holsworthy	0.5	1.2	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.2	2.1
Other stores / centres in Zone 2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.5**	**1.2**	**0.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.2**	**2.1**
Zone 3 Stores and Centres											
Great Torrington	0.3	0.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5
Other stores / centres in Zone 3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.3**	**0.0**	**1.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.5**
Zone 4 Stores and Centres											
Barnstaple	2.9	0.3	1.8	10.2	2.1	1.1	1.3	0.4	0.1	0.2	20.4
Roundswell Retail Warehouse Park, Barnstaple	0.4	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.0	1.9
St Johns Retail Warehouse, Barnstaple	0.0	0.0	0.0	0.5	0.0	0.0	0.1	0.0	0.0	0.0	0.6
Other stores / centres in Zone 4	0.1	0.0	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.9
Sub-total	**3.5**	**0.3**	**1.9**	**12.6**	**2.3**	**1.1**	**1.5**	**0.4**	**0.1**	**0.2**	**23.8**
Zone 5 Stores and Centres											
Braunton	0.0	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	1.7
Other stores / centres in Zone 5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**1.7**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.8**
Zone 6 Stores and Centres											
Ilfracombe	0.0	0.0	0.0	0.0	0.3	2.4	0.0	0.0	0.0	0.0	2.7
Other stores / centres in Zone 6	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.4
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.3**	**2.9**	**0.0**	**0.0**	**0.0**	**0.0**	**3.1**
Zone 7 Stores and Centres											
South Molton	0.0	0.0	0.0	0.0	0.0	0.0	1.9	0.1	0.0	0.0	2.0
Other stores / centres in Zone 7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.9**	**0.1**	**0.0**	**0.0**	**2.0**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.1	0.0	0.0	1.1
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.1**	**0.0**	**0.0**	**1.1**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	0.0	0.7
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.7**	**0.0**	**0.7**
Zone 10 Stores and Centres											
Bude	0.3	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.3	3.8
Other stores / centres in Zone 10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.3**	**0.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**3.3**	**3.8**
Sub-total for study catchment (zones 1-10)	**11.5**	**2.0**	**3.6**	**12.7**	**4.3**	**4.0**	**3.4**	**1.6**	**0.8**	**3.8**	**47.7**
2. Locations outside the study area											
Exeter	0.1	0.1	0.2	0.0	0.0	0.0	0.1	0.1	0.8	0.1	1.6
Crediton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	0.0	1.5
Tiverton	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.7	0.2	0.1	1.3
Okehampton	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	1.1	0.0	1.3
Launceston	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.8
Minehead	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	0.6
Other – outside catchment area	0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.2	0.1	0.2	0.7
Sub-total for locations outside the study area	**0.2**	**0.7**	**0.4**	**0.1**	**0.1**	**0.0**	**0.5**	**1.6**	**3.6**	**0.6**	**7.8**
Total	**11.7**	**2.7**	**3.9**	**12.9**	**4.4**	**4.0**	**3.9**	**3.1**	**4.4**	**4.4**	**55.5**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater.
Locations are listed in descending order of market share.
All monetary values are held constant at 2010 prices.

North Devon & Torridge Retail and Leisure Study 2012

Table 7k Recreation, Sport and Leisure Goods Spending Patterns by Zone in 2012 (%)

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %	Total %
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Atlantic Village, Clovelly Road, Bideford	19.1%	0.0%	10.0%	3.7%	0.0%	0.0%	1.2%	0.0%	0.0%	2.2%	5.7%
Bideford	20.5%	3.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%
Other stores / centres in Zone 1	5.9%	3.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	1.5%
Sub-total	**45.5%**	**6.1%**	**11.6%**	**3.7%**	**0.0%**	**0.0%**	**2.5%**	**0.0%**	**0.0%**	**2.2%**	**11.6%**
Zone 2 Stores and Centres											
Holsworthy	1.4%	15.2%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%	4.0%	1.9%
Other stores / centres in Zone 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**1.4%**	**15.2%**	**3.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.6%**	**4.0%**	**1.9%**
Zone 3 Stores and Centres											
Great Torrington	0.0%	0.0%	15.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
Other stores / centres in Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**0.0%**	**0.0%**	**15.1%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.1%**
Zone 4 Stores and Centres											
Barnstaple	38.4%	26.1%	58.5%	62.3%	55.2%	73.0%	60.7%	9.4%	5.4%	10.2%	42.8%
Seven Brethren Retail Warehouse Park, Barnstaple	5.9%	0.0%	0.0%	7.4%	3.5%	2.8%	1.2%	0.0%	0.0%	0.0%	3.3%
St Johns Retail Warehouse, Barnstaple	0.0%	0.0%	0.0%	7.3%	3.8%	1.4%	3.9%	0.0%	0.0%	0.0%	2.2%
Pottington Industrial Estate, Barnstaple	3.0%	0.0%	0.0%	2.4%	1.0%	2.6%	0.0%	0.0%	0.0%	0.0%	1.4%
Sub-total	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.6%
Sub-total	**47.2%**	**26.1%**	**58.5%**	**81.6%**	**63.5%**	**79.8%**	**67.0%**	**9.4%**	**5.4%**	**10.2%**	**50.3%**
Zone 5 Stores and Centres											
Braunton	3.0%	0.0%	1.6%	1.1%	24.7%	1.2%	2.5%	0.0%	0.0%	0.0%	3.0%
Other stores / centres in Zone 5	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	0.0%	0.2%
Sub-total	**3.0%**	**0.0%**	**1.6%**	**1.1%**	**24.7%**	**1.2%**	**2.5%**	**3.3%**	**0.0%**	**0.0%**	**3.2%**
Zone 6 Stores and Centres											
Ilfracombe	0.0%	0.0%	0.0%	0.0%	1.0%	6.2%	0.0%	0.0%	0.0%	0.0%	0.5%
Other stores / centres in Zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.2%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.0%**	**8.7%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.7%**
Zone 7 Stores and Centres											
South Molton	0.0%	0.0%	1.6%	2.4%	0.0%	1.4%	13.9%	3.3%	0.0%	0.0%	2.0%
Other stores / centres in Zone 7	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Sub-total	**0.0%**	**0.0%**	**3.3%**	**2.4%**	**0.0%**	**1.4%**	**13.9%**	**3.3%**	**0.0%**	**0.0%**	**2.1%**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	0.0%	0.2%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**3.3%**	**0.0%**	**0.0%**	**0.2%**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.4%
Sub-total	**0.0%**	**3.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.7%**	**0.0%**	**0.4%**
Zone 10 Stores and Centres											
Bude	1.4%	9.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	52.3%	5.1%
Other stores / centres in Zone 10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**1.4%**	**9.1%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**52.3%**	**5.1%**
Sub-total for study catchment (zones 1-10)	**98.4%**	**59.6%**	**93.4%**	**88.9%**	**89.2%**	**91.1%**	**86.0%**	**19.3%**	**9.7%**	**68.8%**	**76.6%**
2. Locations outside the study area											
Exeter	0.0%	10.6%	4.9%	0.0%	5.2%	5.0%	3.9%	7.6%	46.2%	8.1%	7.1%
Crediton	0.0%	1.4%	1.6%	0.0%	0.0%	0.0%	3.8%	0.0%	22.3%	0.0%	2.4%
Launceston	0.0%	20.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	15.8%	2.6%
Taunton	0.0%	0.0%	0.0%	2.4%	0.0%	2.6%	2.5%	18.7%	0.0%	0.0%	2.1%
Tiverton	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	22.1%	0.0%	0.0%	1.5%
Other – outside catchment area	1.6%	7.7%	0.0%	8.7%	3.5%	1.4%	3.9%	32.4%	20.7%	7.4%	7.7%
Sub-total for locations outside the study area	**1.6%**	**40.4%**	**6.6%**	**11.1%**	**10.8%**	**8.9%**	**14.0%**	**80.7%**	**90.3%**	**31.2%**	**23.4%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater. Locations are listed in descending order of market share.

North Devon & Torridge Retail and Leisure Study 2012

Table 7I Recreation, Sport and Leisure Goods Spending Patterns by Zone in 2012 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
	17.5	5.1	6.6	18.6	6.3	6.3	6.6	5.4	7.5	7.1	87.1
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Atlantic Village, Clovelly Road, Bideford	3.3	0.0	0.7	0.7	0.0	0.0	0.1	0.0	0.0	0.2	4.9
Bideford	3.6	0.2	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.9
Other stores / centres in Zone 1	1.0	0.2	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	1.3
Sub-total	**8.0**	**0.3**	**0.8**	**0.7**	**0.0**	**0.0**	**0.2**	**0.0**	**0.0**	**0.2**	**10.1**
Zone 2 Stores and Centres											
Holsworthy	0.2	0.8	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.3	1.6
Other stores / centres in Zone 2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.2**	**0.8**	**0.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.3**	**1.6**
Zone 3 Stores and Centres											
Great Torrington	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0
Other stores / centres in Zone 3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.0**	**0.0**	**1.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.0**
Zone 4 Stores and Centres											
Barnstaple	6.7	1.3	3.9	11.6	3.5	4.6	4.0	0.5	0.4	0.7	37.2
Seven Brethren Retail Warehouse Park, Barnstaple	1.0	0.0	0.0	1.4	0.2	0.2	0.1	0.0	0.0	0.0	2.9
St Johns Retail Warehouse, Barnstaple	0.0	0.0	0.0	1.3	0.2	0.1	0.3	0.0	0.0	0.0	1.9
Sub-total	0.5	0.0	0.0	0.4	0.1	0.2	0.0	0.0	0.0	0.0	1.2
Other stores / centres in Zone 4	0.0	0.0	0.0	0.4	0.0	0.0	0.1	0.0	0.0	0.0	0.5
Sub-total	**8.3**	**1.3**	**3.9**	**15.2**	**4.0**	**5.0**	**4.4**	**0.5**	**0.4**	**0.7**	**43.8**
Zone 5 Stores and Centres											
Braunton	0.5	0.0	0.1	0.2	1.6	0.1	0.2	0.0	0.0	0.0	2.6
Other stores / centres in Zone 5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.2
Sub-total	**0.5**	**0.0**	**0.1**	**0.2**	**1.6**	**0.1**	**0.2**	**0.2**	**0.0**	**0.0**	**2.8**
Zone 6 Stores and Centres											
Ilfracombe	0.0	0.0	0.0	0.0	0.1	0.4	0.0	0.0	0.0	0.0	0.5
Other stores / centres in Zone 6	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.2
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.5**	**0.0**	**0.0**	**0.0**	**0.0**	**0.6**
Zone 7 Stores and Centres											
South Molton	0.0	0.0	0.1	0.4	0.0	0.1	0.9	0.2	0.0	0.0	1.7
Other stores / centres in Zone 7	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Sub-total	**0.0**	**0.0**	**0.2**	**0.4**	**0.0**	**0.1**	**0.9**	**0.2**	**0.0**	**0.0**	**1.8**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.2
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.2**	**0.0**	**0.0**	**0.2**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.4
Sub-total	**0.0**	**0.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.2**	**0.0**	**0.4**
Zone 10 Stores and Centres											
Bude	0.2	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.7	4.4
Other stores / centres in Zone 10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.2**	**0.5**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**3.7**	**4.4**
Sub-total for study catchment (zones 1-10)	**17.3**	**3.1**	**6.2**	**16.5**	**5.7**	**5.7**	**5.7**	**1.0**	**0.7**	**4.9**	**66.7**
2. Locations outside the study area											
Exeter	0.0	0.5	0.3	0.0	0.3	0.3	0.3	0.4	3.5	0.6	6.2
Crediton	0.0	0.1	0.1	0.0	0.0	0.0	0.2	0.0	1.7	0.0	2.1
Launceston	0.0	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1.1	2.3
Taunton	0.0	0.0	0.0	0.4	0.0	0.2	0.2	1.0	0.0	0.0	1.8
Tiverton	0.0	0.0	0.0	0.0	0.1	0.0	0.0	1.2	0.0	0.0	1.3
Other – outside catchment area	0.3	0.4	0.0	1.6	0.2	0.1	0.3	1.7	1.6	0.5	6.7
Sub-total for locations outside the study area	**0.3**	**2.1**	**0.4**	**2.1**	**0.7**	**0.6**	**0.9**	**4.4**	**6.8**	**2.2**	**20.4**
Total	**17.5**	**5.1**	**6.6**	**18.6**	**6.3**	**6.3**	**6.6**	**5.4**	**7.5**	**7.1**	**87.1**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater. Locations are listed in descending order of market share.
All monetary values are held constant at 2010 prices.

North Devon & Torridge Retail and Leisure Study 2012

Table 7m Specialist Items (books, CDs, Jewellery, Gifts, China, Glass) Spending Patterns by Zone in 2012 (%)

	Zone 1 %	Zone 2 %	Zone 3 %	Zone 4 %	Zone 5 %	Zone 6 %	Zone 7 %	Zone 8 %	Zone 9 %	Zone 10 %	Total %
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Bideford	39.1%	6.6%	6.9%	4.1%	0.0%	1.1%	0.0%	0.0%	1.1%	3.7%	10.2%
Atlantic Village, Clovelly Road, Bideford	12.4%	2.2%	6.7%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	3.5%
Other stores / centres in Zone 1	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Sub-total	**53.4%**	**8.8%**	**13.7%**	**4.9%**	**0.0%**	**1.1%**	**0.0%**	**0.0%**	**1.1%**	**6.1%**	**14.1%**
Zone 2 Stores and Centres											
Holsworthy	3.8%	13.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%
Other stores / centres in Zone 2	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**3.8%**	**13.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.5%**
Zone 3 Stores and Centres											
Great Torrington	2.8%	1.1%	26.2%	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	2.8%
Other stores / centres in Zone 3	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**2.8%**	**1.1%**	**26.2%**	**0.0%**	**0.0%**	**0.0%**	**2.0%**	**0.0%**	**0.0%**	**0.0%**	**2.8%**
Zone 4 Stores and Centres											
Barnstaple	30.4%	17.6%	53.3%	68.0%	73.5%	51.6%	59.0%	18.9%	4.8%	8.4%	41.6%
St Johns Retail Warehouse, Barnstaple	0.0%	0.0%	0.0%	9.1%	1.4%	0.0%	2.0%	0.9%	0.0%	0.0%	2.2%
Roundswell Retail Warehouse Park, Barnstaple	3.8%	0.0%	0.0%	6.6%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	2.3%
Seven Brethren Retail Warehouse Park, Barnstaple	0.0%	0.0%	0.0%	4.9%	0.0%	0.0%	2.0%	1.8%	0.0%	0.0%	1.3%
Sub-total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**34.3%**	**17.6%**	**53.3%**	**88.5%**	**74.9%**	**52.8%**	**63.0%**	**21.6%**	**4.8%**	**8.4%**	**47.4%**
Zone 5 Stores and Centres											
Braunton	0.0%	0.0%	0.0%	0.0%	16.7%	1.2%	0.0%	0.0%	0.0%	0.0%	1.3%
Other stores / centres in Zone 5	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**16.7%**	**1.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.3%**
Zone 6 Stores and Centres											
Ilfracombe	0.0%	0.0%	0.0%	0.0%	1.4%	37.0%	0.0%	0.0%	0.0%	0.0%	2.7%
Other stores / centres in Zone 6	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.2%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.4%**	**39.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.9%**
Zone 7 Stores and Centres											
South Molton	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	17.0%	0.0%	0.0%	0.0%	1.5%
Other stores / centres in Zone 7	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.1%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.8%**	**0.0%**	**0.0%**	**17.0%**	**0.0%**	**1.3%**	**0.0%**	**1.6%**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	0.0%	0.0%	0.3%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**4.2%**	**0.0%**	**0.0%**	**0.3%**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.6%	0.0%	0.4%
Sub-total	**0.0%**	**2.2%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**3.6%**	**0.0%**	**0.4%**
Zone 10 Stores and Centres											
Bude	0.0%	12.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	71.3%	6.5%
Other stores / centres in Zone 10	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total	**0.0%**	**12.1%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**2.4%**	**71.3%**	**6.5%**
Sub-total for study catchment (zones 1-10)	**94.3%**	**55.0%**	**93.2%**	**94.3%**	**93.0%**	**94.3%**	**82.0%**	**25.8%**	**13.2%**	**85.8%**	**78.8%**
2. Locations outside the study area											
Exeter	5.7%	15.4%	5.6%	2.4%	1.4%	3.4%	5.0%	6.9%	35.7%	4.7%	7.7%
Tiverton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.0%	20.7%	3.7%	0.0%	2.2%
Crediton	0.0%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	27.9%	0.0%	2.7%
Taunton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	28.3%	0.0%	0.0%	1.9%
Launceston	0.0%	22.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	4.7%	1.9%
Other – outside catchment area	0.0%	7.7%	1.2%	3.3%	2.8%	2.3%	3.0%	18.3%	17.1%	4.8%	4.9%
Sub-total for locations outside the study area	**5.7%**	**45.0%**	**6.8%**	**5.7%**	**7.0%**	**5.7%**	**18.0%**	**74.2%**	**86.8%**	**14.2%**	**21.2%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater.
Locations are listed in descending order of market share.

North Devon & Torridge Retail and Leisure Study 2012

Table 7n Specialist Items (books, CDs, Jewellery, Gifts, China, Glass) Spending Patterns by Zone in 2012 (£m)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
	18.5	5.3	6.9	19.6	6.8	6.4	7.0	5.7	8.1	7.2	91.4
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Bideford	7.3	0.4	0.5	0.8	0.0	0.1	0.0	0.0	0.1	0.3	9.3
Atlantic Village, Clovelly Road, Bideford	2.3	0.1	0.5	0.2	0.0	0.0	0.0	0.0	0.0	0.2	3.2
Other stores / centres in Zone 1	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.4
Sub-total	**9.9**	**0.5**	**0.9**	**1.0**	**0.0**	**0.1**	**0.0**	**0.0**	**0.1**	**0.4**	**12.9**
Zone 2 Stores and Centres											
Holsworthy	0.7	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.4
Other stores / centres in Zone 2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.7**	**0.7**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**1.4**
Zone 3 Stores and Centres											
Great Torrington	0.5	0.1	1.8	0.0	0.0	0.0	0.1	0.0	0.0	0.0	2.5
Other stores / centres in Zone 3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.5**	**0.1**	**1.8**	**0.0**	**0.0**	**0.0**	**0.1**	**0.0**	**0.0**	**0.0**	**2.5**
Zone 4 Stores and Centres											
Barnstaple	5.6	0.9	3.7	13.3	5.0	3.3	4.1	1.1	0.4	0.6	38.0
St Johns Retail Warehouse, Barnstaple	0.0	0.0	0.0	1.8	0.1	0.0	0.1	0.1	0.0	0.0	2.1
Roundswell Retail Warehouse Park, Barnstaple	0.7	0.0	0.0	1.3	0.0	0.1	0.0	0.0	0.0	0.0	2.1
Sub-total	0.0	0.0	0.0	1.0	0.0	0.0	0.1	0.1	0.0	0.0	1.2
Other stores / centres in Zone 4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**6.4**	**0.9**	**3.7**	**17.3**	**5.1**	**3.4**	**4.4**	**1.2**	**0.4**	**0.6**	**43.4**
Zone 5 Stores and Centres											
Braunton	0.0	0.0	0.0	0.0	1.1	0.1	0.0	0.0	0.0	0.0	1.2
Other stores / centres in Zone 5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**1.1**	**0.1**	**0.0**	**0.0**	**0.0**	**0.0**	**1.2**
Zone 6 Stores and Centres											
Ilfracombe	0.0	0.0	0.0	0.0	0.1	2.4	0.0	0.0	0.0	0.0	2.5
Other stores / centres in Zone 6	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.1
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**2.5**	**0.0**	**0.0**	**0.0**	**0.0**	**2.6**
Zone 7 Stores and Centres											
South Molton	0.0	0.0	0.0	0.2	0.0	0.0	1.2	0.0	0.0	0.0	1.3
Other stores / centres in Zone 7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1
Sub-total	**0.0**	**0.0**	**0.0**	**0.2**	**0.0**	**0.0**	**1.2**	**0.0**	**0.1**	**0.0**	**1.5**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.2
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.2**	**0.0**	**0.0**	**0.2**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.4
Sub-total	**0.0**	**0.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.3**	**0.0**	**0.4**
Zone 10 Stores and Centres											
Bude	0.0	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.2	5.1	5.9
Other stores / centres in Zone 10	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-total	**0.0**	**0.6**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.2**	**5.1**	**5.9**
Sub-total for study catchment (zones 1-10)	**17.5**	**2.9**	**6.4**	**18.5**	**6.3**	**6.1**	**5.7**	**1.5**	**1.1**	**6.1**	**72.0**
2. Locations outside the study area											
Exeter	1.1	0.8	0.4	0.5	0.1	0.2	0.3	0.4	2.9	0.3	7.0
Tiverton	0.0	0.0	0.0	0.0	0.0	0.0	0.6	1.2	0.3	0.0	2.0
Crediton	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	2.2	0.0	2.4
Taunton	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1.6	0.0	0.0	1.7
Launceston	0.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.3	1.7
Other – outside catchment area	0.0	0.4	0.1	0.6	0.2	0.1	0.2	1.0	1.4	0.3	4.4
Sub-total for locations outside the study area	**1.1**	**2.4**	**0.5**	**1.1**	**0.5**	**0.4**	**1.3**	**4.2**	**7.0**	**1.0**	**19.3**
Total	**18.5**	**5.3**	**6.9**	**19.6**	**6.8**	**6.4**	**7.0**	**5.7**	**8.1**	**7.2**	**91.4**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater. Locations are listed in descending order of market share.
All monetary values are held constant at 2010 prices.

North Devon & Torridge Retail and Leisure Study 2012

Table 8 Comparison Goods Capacity Summary for Torridge District (Static Retention Rate)

	2012	2017	2022	2027	2032	Change 2012-17	Change 2017-22	Change 2022-27	Change 2027-32	Change 2012-32
A) Total Population	208,426	216,492	225,367	233,964	240,520	8,066	8,875	8,597	6,556	32,094
B) Total Expenditure £m (excluding SFT)	528.7	613.4	744.6	900.4	1,072.9	84.6	131.3	155.8	172.6	544.2
C) Retained Expenditure within Torridge (£m) [1] (row B*D)	83.1	96.4	117.0	141.4	168.6	13.3	20.6	24.5	27.1	85.5
D) Retained Expenditure within Torridge (% - excluding SFT)	15.7%	15.7%	15.7%	15.7%	15.7%					
E) Allowance for tourist visitor expenditure £m	18.3	21.1	24.4	28.3	32.8	2.7	3.4	3.9	4.5	14.5
F) Retained Expenditure including tourist visitor expenditure £m (row C+E	101.4	117.4	141.4	169.8	201.4	16.0	24.0	28.4	31.6	100.0
Claims on Expenditure										
G) Existing Traders including turnover growth £m [2]	101.4	110.1	119.8	130.3	141.8	8.7	9.7	10.5	11.5	40.4
H) Commitments [3]	0.0	31.5	34.3	37.3	40.5	31.5	2.8	3.0	3.3	40.5
Impact on capacity £m (row G+H)	101.4	141.6	154.0	167.6	182.3	40.2	12.5	13.5	14.7	80.9
SUMMARY						**2012-17**	**2017-22**	**2022-27**	**2027-32**	**2012-32**
Initial surplus £m						16.0	24.0	28.4	31.6	100.0
Claims on capacity £m						40.2	12.5	13.5	14.7	80.9
I) RESIDUAL £m [4]						**-24.2**	**11.5**	**14.8**	**16.9**	**19.1**
Turnover per sq m (assumed)	4,500					4,886	5,316	5,783	6,292	
J) Floorspace Requirement Torridge sq m (net) [5]						**-4,945**	**2,168**	**2,561**	**2,683**	**2,468**
K) Floorspace Requirement Torridge sq m (gross)						-6,593	2,891	3,415	3,578	3,291

NOTES:
(1) Study area expenditure retention - this is the product of the current market share of Torridge's zones (as a percentage) for comparison shopping and the total study area expenditure. The market share remains constant for each of the forecast years.
(2) Existing Traders - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase as follows: 2012-2013 at 1.5% per annum, 2013-2032 at 1.7% per annum. Sourced from Experian Retail Planner Briefing Note 9, September 2011.
(3) Commitments - this is the turnover of commitments for new floorspace in the study area, which are also assumed to increase at the same rates in note 2 above to account for growth in sales density.
(4) Residual - the product of the total available expenditure minus the deductions for the existing centres' turnover and commitments.
(5) Floorspace Requirement: this is the conversion of the residual expenditure into a floorspace requirement using a sales density estimate of £4,500/sq. m in 2012, which is forecast to increase as per the rates in note 2 until 2032. A 75% net to gross ratio applied. The figures show the floorspace requirement for each period and are not cumulative.

All monetary values are held constant at 2010 prices.

North Devon & Torridge Retail and Leisure Study 2012

Table 9 Comparison Goods Capacity Summary for North Devon District (Static Retention Rate)

	2012	2017	2022	2027	2032	Change 2012-17	Change 2017-22	Change 2022-27	Change 2027-32	Change 2012-32
A) Total Population	208,426	216,492	225,367	233,964	240,520	8,066	8,875	8,597	6,556	32,094
B) Total Expenditure £m (excluding SFT)	528.7	613.4	744.6	900.4	1,072.9	84.6	131.3	155.8	172.6	544.2
C) Retained Expenditure within Torridge (£m) [1] (row B*D)	301.0	349.2	423.9	512.6	610.9	48.2	74.7	88.7	98.3	309.8
D) Retained Expenditure within Torridge (% - excluding SFT)	56.9%	56.9%	56.9%	56.9%	56.9%					
E) Allowance for tourist visitor expenditure £m	40.4	46.4	53.8	62.4	72.4	6.0	7.4	8.6	9.9	31.9
F) Retained Expenditure including tourist visitor expenditure £m (row C+E	341.5	395.7	477.8	575.0	683.2	54.2	82.1	97.3	108.2	341.8
Claims on Expenditure										
G) Existing Traders including turnover growth £m [2]	341.5	370.8	403.4	438.8	477.4	29.3	32.6	35.5	38.6	136.0
H) Commitments [3]	0.0	29.2	31.7	34.5	37.6	29.2	2.6	2.8	3.0	37.6
Impact on capacity £m (row G+H)	341.5	399.9	435.1	473.4	515.0	58.5	35.2	38.3	41.6	173.5
SUMMARY						**2012-17**	**2017-22**	**2022-27**	**2027-32**	**2012-32**
Initial surplus £m						54.2	82.1	97.3	108.2	341.8
Claims on capacity £m						58.5	35.2	38.3	41.6	173.5
I) RESIDUAL £m [4]						**-4.3**	**47.0**	**59.0**	**66.6**	**168.3**
Turnover per sq m (assumed)	4,500					4,886	5,316	5,783	6,292	
J) Floorspace Requirement North Devon sq m (net) [5]						**-873**	**8,834**	**10,200**	**10,580**	**28,742**
K) Floorspace Requirement North Devon sq m (gross)						-1,164	11,778	13,601	14,107	38,322

NOTES:
(1) Study area expenditure retention - this is the product of the current market share of North Devon's zones (as a percentage) for comparison shopping and the total study area expenditure. The market share remains constant for each of the forecast years.
(2) Existing Traders - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase as follows: 2012-2013 at 1.5% per annum, 2013-2032 at 1.7% per annum. Sourced from Experian Retail Planner Briefing Note 9, September 2011.
(3) Commitments - this is the turnover of commitments for new floorspace in the study area, which are also assumed to increase at the same rates in note 2 above to account for growth in sales density.
(4) Residual - the product of the total available expenditure minus the deductions for the existing centres' turnover and commitments.
(5) Floorspace Requirement: this is the conversion of the residual expenditure into a floorspace requirement using a sales density estimate of £4,500/sq. m in 2012, which is forecast to increase as per the rates in note 2 until 2032. A 75% net to gross ratio applied. The figures show the floorspace requirement for each period and are not cumulative.

All monetary values are held constant at 2010 prices.

North Devon & Torridge Retail and Leisure Study 2012

Table 10 - Convenience Goods Expenditure (per capita)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
2010 Experian MMG3 Base	2,020	2,065	1,980	1,922	2,054	2,000	2,049	2,165	2,143	2,041
2012	2,006	2,051	1,966	1,909	2,040	1,986	2,035	2,150	2,128	2,027
2017	2,065	2,111	2,024	1,965	2,099	2,044	2,094	2,213	2,190	2,086
2022	2,125	2,173	2,083	2,022	2,161	2,104	2,156	2,278	2,255	2,147
2027	2,190	2,239	2,146	2,084	2,227	2,168	2,221	2,347	2,323	2,213
2032	2,256	2,307	2,212	2,147	2,294	2,234	2,289	2,418	2,394	2,280
Numeric Change 2012-32	250	256	245	238	255	248	254	268	266	253
Percentage Change 2012-32	12.5%	12.5%	12.5%	12.5%	12.5%	12.5%	12.5%	12.5%	12.5%	12.5%

NOTES:
(1) Expenditure data is derived from Experian MMG3 2010 per capita annual comparison goods expenditure estimates (released in 2011).
(2) The 2010 expenditure data has been projected forward to the base year of the study (2012). Per capita expenditure growth is estimated using the forecasts provied by Experian in their September 2011 Retail Planner Birefing Note 9 as follows: 2010-11 = -0.30%; 2011-2012 = -0.4%; 2012-2018 = 0.5% per annum; 2018-2032 = 0.6% per annum.
(3) Experian only forecast to 2028, the same rate of 0.6% per annum is continued to 2032.

All monetary values are held constant at 2010 prices.

North Devon & Torridge Retail and Leisure Study 2012

Table 11 Total Convenience Goods Expenditure & Expenditure Growth

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
Year	**£m**	**£m**	**£m**	**£m**	**£m**	**£m**	**£m**	**£m**	**£m**	**£m**	**£m**
Total 2012 (including SFT)	£85.6	£25.5	£31.4	£87.3	£30.6	£30.3	£31.7	£27.5	£33.9	£34.6	£418.3
2012 SFT (4.6% market share)*	£3.9	£1.2	£1.4	£4.0	£1.4	£1.4	£1.5	£1.3	£1.6	£1.6	£19.2
Total 2012 (excluding SFT)	£81.7	£24.4	£29.9	£83.2	£29.2	£28.9	£30.2	£26.2	£32.3	£33.0	£399.1
Total 2017 (including SFT)	£93.1	£27.8	£34.3	£93.2	£31.9	£32.1	£33.1	£28.7	£36.4	£36.7	£447.2
2017 SFT (6.0% market share)*	£5.6	£1.7	£2.1	£5.6	£1.9	£1.9	£2.0	£1.7	£2.2	£2.2	£26.8
Total 2017 (excluding SFT)	£87.5	£26.1	£32.2	£87.6	£30.0	£30.2	£31.1	£27.0	£34.2	£34.5	£420.4
Total 2022 (including SFT)	£101.4	£30.1	£37.2	£99.9	£33.4	£34.0	£35.0	£30.2	£38.9	£39.0	£479.1
2022 SFT (6.3% market share)*	£6.4	£1.9	£2.3	£6.3	£2.1	£2.1	£2.2	£1.9	£2.5	£2.5	£30.2
Total 2022 (excluding SFT)	£95.0	£28.2	£34.9	£93.6	£31.3	£31.9	£32.8	£28.3	£36.4	£36.5	£449.0
Total 2027 (including SFT)	£109.6	£32.5	£40.3	£107.1	£35.0	£36.2	£36.8	£31.7	£41.5	£41.5	£512.4
2027 SFT (6.9% market share)*	£7.6	£2.2	£2.8	£7.4	£2.4	£2.5	£2.5	£2.2	£2.9	£2.9	£35.4
Total 2027 (excluding SFT)	£102.0	£30.3	£37.5	£99.8	£32.6	£33.7	£34.3	£29.5	£38.7	£38.7	£477.1
Total 2032 (including SFT)	£117.0	£34.5	£43.1	£114.1	£36.7	£38.2	£38.6	£33.1	£43.8	£43.7	£542.7
2032 SFT (6.9% market share)*	£8.1	£2.4	£3.0	£7.9	£2.5	£2.6	£2.7	£2.3	£3.0	£3.0	£37.4
Total 2032 (excluding SFT)	£109.0	£32.1	£40.1	£106.2	£34.1	£35.6	£35.9	£30.8	£40.7	£40.7	£505.3
Growth 2012 - 2032 (excluding SFT)	**£27.3**	**£7.8**	**£10.2**	**£22.9**	**£4.9**	**£6.7**	**£5.7**	**£4.6**	**£8.4**	**£7.7**	**£106.2**

NOTES:
(1) The figures in the above table are the products of multiplying the data presented in Table 1 (population) by Table 10 (per capita convenience goods expenditure), and are in millions of pounds (£m).
* Growth in SFT expenditure is sourced from Experian Retail Planner 9 (September 2011) for the forecast years as a proportion of convenience goods sales taken by SFT trading, adjusted for SFT sales from stores.

All monetary values are held constant at 2010 prices.

North Devon & Torridge Retail and Leisure Study 2012

Table 12 Convenience Goods Spending Patterns by Zone in 2012 (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
	%	%	%	%	%	%	%	%	%	%	%
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Morrisons, Kingsley Road, Bideford	32.5%	6.5%	15.9%	4.4%	1.5%	1.5%	0.9%	0.0%	0.9%	0.0%	9.5%
Asda, Clovelly Road Industrial Est, Bideford	20.5%	4.8%	6.2%	1.1%	1.1%	0.4%	2.1%	0.0%	1.8%	1.8%	5.7%
Tesco, Manteo Way, Bideford	7.7%	0.9%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	2.0%
Bideford	3.8%	0.5%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%
Other stores / centres in Zone 1	5.6%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%
Sub-total	**70.1%**	**12.7%**	**25.6%**	**5.6%**	**2.7%**	**1.9%**	**3.0%**	**0.0%**	**2.7%**	**2.5%**	**19.2%**
Zone 2 Stores and Centres											
Waitrose, Underlane/Station Road, Holsworthy	3.4%	27.3%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	6.3%	3.1%
Holsworthy	0.0%	2.4%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.2%
Other stores / centres in Zone 2	1.5%	10.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Sub-total	**4.8%**	**40.2%**	**3.1%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.6%**	**6.3%**	**4.3%**
Zone 3 Stores and Centres											
Lidl, New Street, Great Torrington	1.8%	0.1%	16.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	1.6%
Great Torrington	0.6%	0.0%	7.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Other stores / centres in Zone 3	0.9%	0.0%	5.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.6%
Sub-total	**3.2%**	**0.1%**	**29.7%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.3%**	**0.0%**	**2.9%**
Zone 4 Stores and Centres											
Sainsbury's, Gratton Way, Barnstaple	10.7%	2.2%	14.1%	33.0%	10.1%	6.1%	12.9%	2.5%	1.7%	0.4%	12.8%
Tesco, Barnstaple Retail Park, Barnstaple	3.8%	0.1%	6.7%	17.2%	7.2%	5.4%	10.4%	5.5%	0.4%	0.9%	7.1%
Tesco, Rose Lane, Whiddon Valley, Barnstaple	2.0%	0.0%	6.1%	20.0%	3.2%	3.0%	14.9%	0.9%	1.2%	0.4%	6.8%
Barnstaple	0.2%	0.1%	0.5%	5.8%	0.5%	0.2%	0.2%	0.2%	0.0%	0.1%	1.4%
Iceland, 58 High Street, Barnstaple	0.0%	0.0%	1.3%	3.7%	0.1%	1.4%	0.0%	0.0%	0.0%	0.0%	1.0%
Co-op, Upcott Avenue, Braunton Road, Barnstaple	0.0%	0.0%	0.3%	3.2%	2.8%	0.4%	0.2%	0.0%	0.2%	0.0%	1.0%
Other stores / centres in Zone 4	0.9%	0.0%	1.7%	8.9%	4.0%	1.9%	3.6%	1.8%	0.6%	0.0%	3.0%
Sub-total	**17.7%**	**2.4%**	**30.7%**	**91.9%**	**27.9%**	**18.3%**	**42.2%**	**10.8%**	**4.2%**	**1.8%**	**33.0%**
Zone 5 Stores and Centres											
Tesco, Velator Way, Braunton	0.0%	0.0%	0.0%	0.0%	49.1%	0.7%	0.0%	0.0%	0.0%	0.1%	3.7%
Braunton	0.0%	0.0%	0.0%	0.0%	10.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.8%
Other stores / centres in Zone 5	0.0%	0.0%	0.2%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Sub-total	**0.0%**	**0.0%**	**0.2%**	**0.0%**	**60.5%**	**0.9%**	**0.0%**	**0.0%**	**0.0%**	**0.1%**	**4.5%**
Zone 6 Stores and Centres											
Tesco, New Barnstaple Road, Killicleave Farm, Ilfracom	0.0%	0.0%	0.0%	1.1%	5.5%	51.4%	0.0%	0.0%	0.0%	0.0%	4.4%
Lidl, Wilder Road, Ilfracombe	0.0%	0.0%	0.0%	0.0%	1.8%	11.7%	0.0%	0.0%	0.0%	0.0%	1.0%
Ilfracombe	0.0%	0.0%	0.0%	0.0%	0.2%	11.0%	0.0%	0.0%	0.0%	0.0%	0.8%
Other stores / centres in Zone 6	0.0%	0.4%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.2%
Sub-total	**0.0%**	**0.4%**	**0.0%**	**1.1%**	**7.5%**	**76.6%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**6.3%**
Zone 7 Stores and Centres											
Sainsbury's, New Road, South Molton	0.0%	0.0%	1.5%	0.6%	0.0%	0.0%	29.8%	2.8%	0.0%	0.0%	2.7%
South Molton	0.2%	0.0%	0.0%	0.1%	0.0%	0.2%	8.2%	0.0%	0.0%	0.0%	0.7%
Other stores / centres in Zone 7	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	2.7%	0.0%	0.6%	0.0%	0.3%
Sub-total	**0.2%**	**0.0%**	**2.0%**	**0.7%**	**0.0%**	**0.2%**	**40.8%**	**2.8%**	**0.6%**	**0.0%**	**3.7%**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%	19.4%	0.0%	0.0%	1.3%
Sub-total	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.2%**	**0.2%**	**19.4%**	**0.0%**	**0.0%**	**1.3%**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0%	0.4%	0.2%	0.0%	0.0%	0.0%	0.1%	0.0%	9.3%	0.0%	0.8%
Sub-total	**0.0%**	**0.4%**	**0.2%**	**0.0%**	**0.0%**	**0.0%**	**0.1%**	**0.0%**	**9.3%**	**0.0%**	**0.8%**
Zone 10 Stores and Centres											
Morrisons, Stucley Road, Bude	3.8%	24.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	50.9%	6.6%
Sainsbury's, Crooklets Road, Bude	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	14.3%	1.2%
Other stores / centres in Zone 10	0.2%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	14.0%	1.2%
Sub-total	**4.0%**	**25.6%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**1.9%**	**79.3%**	**9.1%**
Sub-total for study catchment (zones 1-10)	**100.0%**	**81.9%**	**91.6%**	**99.3%**	**98.6%**	**98.1%**	**86.2%**	**33.0%**	**19.6%**	**90.1%**	**85.1%**
2. Locations outside the study area											
Morrisons, Kennedy Way, Tiverton	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	8.4%	24.1%	2.7%	0.0%	2.5%
Tesco, Tavistock Road, Launceston	0.0%	11.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	7.7%	1.4%
Tesco Express, 36 High Street, Crediton	0.0%	0.0%	0.4%	0.0%	0.2%	0.0%	0.4%	0.0%	16.6%	0.0%	1.4%
Waitrose, School Way, Okehampton	0.0%	0.9%	4.2%	0.0%	0.0%	0.0%	1.3%	0.0%	10.9%	0.0%	1.3%
Tesco, Seaward Way, Minehead	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	17.3%	0.0%	0.0%	1.2%
Tesco, Wellparks, Crediton	0.0%	0.0%	0.4%	0.0%	0.9%	0.0%	0.4%	0.0%	10.7%	0.0%	1.0%
Other – outside catchment area	0.0%	5.7%	3.3%	0.7%	0.3%	1.1%	3.2%	25.6%	38.7%	2.2%	6.1%
Sub-total for locations outside the study area	**0.0%**	**18.1%**	**8.4%**	**0.7%**	**1.4%**	**1.9%**	**13.8%**	**67.0%**	**80.4%**	**9.9%**	**14.9%**
Total	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater.
Locations are listed in descending order of market share.

North Devon & Torridge Retail and Leisure Study 2012

Table 13 Convenience Goods Spending Patterns by Zone in 2012 (£)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Total
	81.7	24.4	29.9	83.2	29.2	28.9	30.2	26.2	32.3	33.0	399.1
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
1. Locations within North Devon & Torridge study area											
Zone 1 Stores and Centres											
Morrisons, Kingsley Road, Bideford	26.5	1.6	4.8	3.7	0.4	0.4	0.3	0.0	0.3	0.0	38.0
Asda, Clovelly Road Industrial Est, Bideford	16.7	1.2	1.9	0.9	0.3	0.1	0.6	0.0	0.6	0.6	22.9
Tesco, Manteo Way, Bideford	6.3	0.2	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.2	7.8
Bideford	3.1	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	3.3
Other stores / centres in Zone 1	4.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.6
Sub-total	**57.3**	**3.1**	**7.7**	**4.7**	**0.8**	**0.5**	**0.9**	**0.0**	**0.9**	**0.8**	**76.7**
Zone 2 Stores and Centres											
Waitrose, Underlane/Station Road, Holsworthy	2.7	6.6	0.7	0.0	0.0	0.0	0.0	0.0	0.1	2.1	12.3
Holsworthy	0.0	0.6	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.9
Other stores / centres in Zone 2	1.2	2.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.7
Sub-total	**3.9**	**9.8**	**0.9**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.2**	**2.1**	**17.0**
Zone 3 Stores and Centres											
Lidl, New Street, Great Torrington	1.5	0.0	4.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.4
Great Torrington	0.5	0.0	2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.7
Other stores / centres in Zone 3	0.7	0.0	1.8	0.0	0.0	0.0	0.0	0.0	0.1	0.0	2.6
Sub-total	**2.7**	**0.0**	**8.9**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.1**	**0.0**	**11.7**
Zone 4 Stores and Centres											
Sainsbury's, Gratton Way, Barnstaple	8.8	0.5	4.2	27.5	3.0	1.8	3.9	0.7	0.5	0.1	51.0
Tesco, Barnstaple Retail Park, Barnstaple	3.1	0.0	2.0	14.3	2.1	1.6	3.1	1.4	0.1	0.3	28.2
Tesco, Rose Lane, Whiddon Valley, Barnstaple	1.6	0.0	1.8	16.6	0.9	0.9	4.5	0.2	0.4	0.1	27.2
Barnstaple	0.1	0.0	0.1	4.8	0.2	0.0	0.1	0.0	0.0	0.0	5.5
Iceland, 58 High Street, Barnstaple	0.0	0.0	0.4	3.1	0.0	0.4	0.0	0.0	0.0	0.0	3.9
Co-op, Upcott Avenue, Braunton Road, Barnstaple	0.0	0.0	0.1	2.7	0.8	0.1	0.1	0.0	0.1	0.0	3.8
Other stores / centres in Zone 4	0.8	0.0	0.5	7.4	1.2	0.5	1.1	0.5	0.2	0.0	12.1
Sub-total	**14.5**	**0.6**	**9.2**	**76.5**	**8.1**	**5.3**	**12.8**	**2.8**	**1.3**	**0.6**	**131.8**
Zone 5 Stores and Centres											
Tesco, Velator Way, Braunton	0.0	0.0	0.0	0.0	14.3	0.2	0.0	0.0	0.0	0.0	14.6
Braunton	0.0	0.0	0.0	0.0	3.0	0.0	0.0	0.0	0.0	0.0	3.0
Other stores / centres in Zone 5	0.0	0.0	0.1	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.4
Sub-total	**0.0**	**0.0**	**0.1**	**0.0**	**17.7**	**0.3**	**0.0**	**0.0**	**0.0**	**0.0**	**18.0**
Zone 6 Stores and Centres											
Tesco, New Barnstaple Road, Killicleave Farm, Ilfracomb	0.0	0.0	0.0	0.9	1.6	14.9	0.0	0.0	0.0	0.0	17.4
Lidl, Wilder Road, Ilfracombe	0.0	0.0	0.0	0.0	0.5	3.4	0.0	0.0	0.0	0.0	3.9
Ilfracombe	0.0	0.0	0.0	0.0	0.1	3.2	0.0	0.0	0.0	0.0	3.2
Other stores / centres in Zone 6	0.0	0.1	0.0	0.0	0.0	0.7	0.0	0.0	0.0	0.0	0.8
Sub-total	**0.0**	**0.1**	**0.0**	**0.9**	**2.2**	**22.1**	**0.0**	**0.0**	**0.0**	**0.0**	**25.3**
Zone 7 Stores and Centres											
Sainsbury's, New Road, South Molton	0.0	0.0	0.5	0.5	0.0	0.0	9.0	0.7	0.0	0.0	10.7
South Molton	0.1	0.0	0.0	0.1	0.0	0.1	2.5	0.0	0.0	0.0	2.8
Other stores / centres in Zone 7	0.0	0.0	0.1	0.0	0.0	0.0	0.8	0.0	0.2	0.0	1.1
Sub-total	**0.1**	**0.0**	**0.6**	**0.6**	**0.0**	**0.1**	**12.3**	**0.7**	**0.2**	**0.0**	**14.6**
Zone 8 Stores and Centres											
Other stores / centres in Zone 8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.1	0.0	0.0	5.2
Sub-total	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**5.1**	**0.0**	**0.0**	**5.2**
Zone 9 Stores and Centres											
Other stores / centres in Zone 9	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	3.0	0.0	3.2
Sub-total	**0.0**	**0.1**	**0.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**3.0**	**0.0**	**3.2**
Zone 10 Stores and Centres											
Morrisons, Stucley Road, Bude	3.1	6.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	16.8	26.5
Sainsbury's, Crooklets Road, Bude	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.7	4.8
Other stores / centres in Zone 10	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.6	4.9
Sub-total	**3.2**	**6.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.6**	**26.2**	**36.3**
Sub-total for study catchment (zones 1-10)	**81.7**	**20.0**	**27.4**	**82.7**	**28.8**	**28.3**	**26.1**	**8.6**	**6.3**	**29.8**	**339.7**
2. Locations outside the study area											
Morrisons, Kennedy Way, Tiverton	0.0	0.0	0.0	0.0	0.0	0.1	2.5	6.3	0.9	0.0	9.8
Tesco, Tavistock Road, Launceston	0.0	2.8	0.0	0.0	0.0	0.0	0.0	0.0	0.3	2.5	5.6
Tesco Express, 36 High Street, Crediton	0.0	0.0	0.1	0.0	0.1	0.0	0.1	0.0	5.4	0.0	5.7
Waitrose, School Way, Okehampton	0.0	0.2	1.3	0.0	0.0	0.0	0.4	0.0	3.5	0.0	5.4
Tesco, Seaward Way, Minehead	0.0	0.0	0.0	0.0	0.0	0.1	0.0	4.5	0.0	0.0	4.7
Tesco, Wellparks, Crediton	0.0	0.0	0.1	0.0	0.3	0.0	0.1	0.0	3.5	0.0	4.0
Other – outside catchment area	0.0	1.4	1.0	0.6	0.1	0.3	1.0	6.7	12.5	0.7	24.3
Sub-total for locations outside the study area	**0.0**	**4.4**	**2.5**	**0.6**	**0.4**	**0.6**	**4.2**	**17.6**	**26.0**	**3.3**	**59.4**
Total	**81.7**	**24.4**	**29.9**	**83.2**	**29.2**	**28.9**	**30.2**	**26.2**	**32.3**	**33.0**	**399.1**

Source: NEMS Survey of Households, March/April 2012.
Notes: The seven main retail centres within North Devon and Torridge are listed plus any other centres and individual stores where the total market share is 1% or greater.
Locations are listed in descending order of market share.
All monetary values are held constant at 2010 prices.

North Devon & Torridge Retail and Leisure Study 2012

Table 14 Convenience Goods Capacity Summary for Torridge District (Static Retention Rate)

	2012	2017	2022	2027	2032	Change 2012-17	Change 2017-22	Change 2022-27	Change 2027-32	Change 2012-32
A) Total Population	208,426	216,492	225,367	233,964	240,520	8,066	8,875	8,597	6,556	32,094
B) Total Expenditure £m (excluding SFT)	399.1	420.4	449.0	477.1	505.3	21.3	28.6	28.1	28.2	106.2
C) Retained Expenditure within Torridge (£m) [1] (row B*D)	105.3	110.9	118.5	125.9	133.3	5.6	7.5	7.4	7.4	28.0
D) Retained Expenditure within Torridge (% - excluding SFT)	26.4%	26.4%	26.4%	26.4%	26.4%					
E) Allowance for tourist visitor expenditure £m	5.9	6.1	6.3	6.5	6.7	0.2	0.2	0.2	0.2	0.7
F) Retained Expenditure including tourist visitor expenditure £m (row C+E)	111.2	117.0	124.7	132.3	140.0	5.8	7.7	7.6	7.6	28.7
Claims on Expenditure										
G) Existing Traders including turnover growth £m [2]	111.2	113.5	114.9	116.0	117.2	2.2	1.4	1.2	1.2	5.9
H) Commitments [3]	0.0	17.1	17.3	17.5	17.7	17.1	0.2	0.2	0.2	17.7
Impact on capacity £m (row G+H)	111.2	130.6	132.2	133.5	134.8	19.3	1.6	1.3	1.3	23.6
SUMMARY						**2012-17**	**2017-22**	**2022-27**	**2027-32**	**2012-32**
Initial surplus £m						5.8	7.7	7.6	7.6	28.7
Claims on capacity £m						19.3	1.6	1.3	1.3	23.6
I) RESIDUAL £m [4]						**-13.6**	**6.1**	**6.3**	**6.3**	**5.1**
Turnover per sq m (assumed)	10,000					10,202	10,325	10,428	10,533	
J) Floorspace Requirement Torridge sq m (net) [5]						**-1,331**	**595**	**603**	**597**	**464**
K) Floorspace Requirement Torridge sq m (gross)						-1,901	850	861	853	663

NOTES:
(1) Study area expenditure retention - this is the product of the current market share of Torridge's zones (as a percentage) for comparison shopping and the total study area expenditure. The market share remains constant for each of the forecast years.
(2) Existing Traders - this is the turnover of stores that is derived from study area expenditure only. The turnover is forecast to increase as follows: 2012-2018 at 0.4% per annum, 2018-2032 at 0.2% per annum. Sourced from Experian Retail Planner Briefing Note 9, September 2011.
(3) Commitments - this is the turnover of commitments for new floorspace in the study area, which are also assumed to increase at the same rates in note 2 above to account for growth in sales density.
(4) Residual - the product of the total available expenditure minus the deductions for the existing centres' turnover and commitments.
(5) Floorspace Requirement: this is the conversion of the residual expenditure into a floorspace requirement using a sales density estimate of £10,000/sq. m in 2012, which is forecast to increase as per the rates in note 2 until 2032. A 70% net to gross ratio applied. The figures show the floorspace requirement for each period and are not cumulative.

All monetary values are held constant at 2010 prices.

North Devon & Torridge Retail and Leisure Study 2012

Table 15 Convenience Goods Capacity Summary for North Devon District (Static Retention Rate)

	2012	2017	2022	2027	2032	Change 2012-17	Change 2017-22	Change 2022-27	Change 2027-32	Change 2012-32
A) Total Population	208,426	216,492	225,367	233,964	240,520	8,066	8,875	8,597	6,556	32,094
B) Total Expenditure £m (excluding SFT)	399.1	420.4	449.0	477.1	505.3	21.3	28.6	28.1	28.2	106.2
C) Retained Expenditure within North Devon (£m) [1] (row B*D)	189.7	199.8	213.4	226.8	240.2	10.1	13.6	13.4	13.4	50.5
D) Retained Expenditure within North Devon (% - excluding SFT)	47.5%	47.5%	47.5%	47.5%	47.5%					
E) Allowance for tourist visitor expenditure £m	13.9	14.3	14.7	15.1	15.6	0.4	0.4	0.4	0.5	1.7
F) Retained Expenditure including tourist visitor expenditure £m (row C+E)	203.6	214.1	228.1	241.9	255.7	10.5	14.0	13.8	13.8	52.1
Claims on Expenditure										
G) Existing Traders including turnover growth £m [2]	203.6	207.7	210.2	212.3	214.5	4.1	2.5	2.1	2.1	10.9
H) Commitments [3]	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Impact on capacity £m (row G+H)	203.6	207.7	210.2	212.3	214.5	4.1	2.5	2.1	2.1	10.9
SUMMARY						**2012-17**	**2017-22**	**2022-27**	**2027-32**	**2012-32**
Initial surplus £m						10.5	14.0	13.8	13.8	52.1
Claims on capacity £m						4.1	2.5	2.1	2.1	10.9
I) RESIDUAL £m [4]						**6.4**	**11.5**	**11.7**	**11.7**	**41.3**
Turnover per sq m (assumed)	10,000					10,202	10,325	10,428	10,533	
J) Floorspace Requirement North Devon sq m (net) [5]						**624**	**1,113**	**1,123**	**1,112**	**3,972**
K) Floorspace Requirement North Devon sq m (gross)						892	1,590	1,604	1,589	5,675

NOTES:
(1) Study area expenditure retention - this is the product of the current market share of Torridge's zones (as a percentage) for comparison shopping and the total study area expenditure. The market share remains constant for each of the forecast years.
(2) Existing Traders - this is the turnover of stores that is derived from study area expenditure only. The turnover is forecast to increase as follows: 2012-2018 at 0.4% per annum, 2018-2032 at 0.2% per annum. Sourced from Experian Retail Planner Briefing Note 9, September 2011.
(3) Commitments - this is the turnover of commitments for new floorspace in the study area, which are also assumed to increase at the same rates in note 2 above to account for growth in sales density.
(4) Residual - the product of the total available expenditure minus the deductions for the existing centres' turnover and commitments.
(5) Floorspace Requirement: this is the conversion of the residual expenditure into a floorspace requirement using a sales density estimate of £10,000/sq. m in 2012, which is forecast to increase as per the rates in note 2 until 2032. A 70% net to gross ratio applied. The figures show the floorspace requirement for each period and are not cumulative.

All monetary values are held constant at 2010 prices.

3 Appendix: Leisure and Recreation Assessment Tables

NORTH DEVON AND TORRIDGE RETAIL AND LEISURE STUDY

Table 16 - Leisure Sector Expenditure 2012-2032

Table A - Per Capita expenditure 2012-2032 (Average for study area). All figures in £

Expenditure Category	2012	2017	2022	2027	2032	2012%	2032%
Accommodation services	109	120	131	144	158	7.5	7.5
Cultural services	240	263	289	318	350	16.5	16.6
Games of chance	92	101	111	122	134	6.3	6.4
Hairdressing salons & personal grooming	76	83	91	100	110	5.2	5.2
Recreational & sporting services	80	88	96	106	116	5.5	5.5
Restaurants, cafes etc	853	937	1,030	1,131	1,243	58.9	58.9
Total Leisure Services Expenditure	1,449	1,592	1,749	1,922	2,112	100.0	100.0

Table B Total Expenditure on Different Categories of Leisure Services, 2012-2026. All figures in £m

COICOP Category	Expenditure Category	2012	2017	2022	2027	2032	Growth 2012-22	Growth 2012-32
		£m	£m	£m	£m	£m	£m	£m
11.2	Accommodation services	22.7	25.9	29.6	33.8	38.1	6.9	15.4
9.4.2	Cultural services	50.0	57.0	65.2	74.4	84.1	15.3	34.1
9.4.3	Games of chance	19.2	21.9	25.0	28.5	32.3	5.9	13.1
12.1.1	Hairdressing salons & personal grooming	15.8	18.0	20.6	23.4	26.5	4.8	10.7
9.4.1	Recreational & sporting services	16.6	19.0	21.7	24.8	28.0	5.1	11.4
11.1.1	Restaurants, cafes etc	177.8	202.9	232.1	264.7	299.0	54.3	121.2
Total	Leisure Expenditure	302.0	344.7	394.2	449.6	507.9	92.2	205.9

Table C Leisure Expenditure Sub Categories, 2012-2026

		Total Pop 201	Total Pop 2017		Total Pop 2022		Total Pop 2027		Total Pop 2032		
		208,426	216,492		225,367		233,964		240,520		
COICOP Category	Description	Per Person (£)	Per Person (£)	Total (£m)	Per Person (£)	Total (£m)	Per Person (£)	Total (£m)	Per Person (£)	Total (£m)	Total change 2012-2022 (£m)
9.4.1	Recreation and sporting services	79.9	87.8	19.0	96.4	21.7	106.0	24.8	116.5	28.0	5.09
9.4.2	Cultural Services	239.7	263.4	57.0	289.5	65.2	318.1	74.4	349.5	84.1	15.26
09.4.2(pt)	*Cinema admissions (sub part of cultural services)*	*7.4*	*8.1*	1.8	*8.9*	2.0	*9.8*	2.3	*10.8*	2.6	0.47
09.4.2(pt)	*Theatre admissions (sub part of cultural services)*	*13.2*	*14.5*	3.1	*16.0*	3.6	*17.6*	4.1	*19.3*	4.6	0.84
09.4.2(pt)	*Television and video rentals (sub part of cultural services)*	*3.8*	*4.1*	0.9	*4.6*	1.0	*5.0*	1.2	*5.5*	1.3	0.24
09.4.2(pt)	*Social subscriptions (sub part of cultural services)*	*7.7*	*8.5*	1.8	*9.3*	2.1	*10.2*	2.4	*11.2*	2.7	0.49
09.4.2(pt)	*Photographic processing (sub part of cultural services)*	*7.4*	*8.1*	1.8	*8.9*	2.0	*9.8*	2.3	*10.8*	2.6	0.47
09.4.2(pt)	*Other (sub part of cultural services)*	*75.1*	*82.5*	17.9	*90.7*	20.4	*99.6*	23.3	*109.5*	26.3	4.78
09.4.3	Games of chance	91.9	101.0	21.9	111.0	25.0	122.0	28.5	134.1	32.3	5.86
11.1.1	Restaurants, Cafes, Etc	763.2	838.5	181.5	921.2	207.6	1012.2	236.8	1112.2	267.5	48.54
11.1.2	Canteens	89.8	98.7	21.4	108.4	24.4	119.1	27.9	130.9	31.5	5.71
11.2	Accommodation Services	108.9	119.6	25.9	131.4	29.6	144.3	33.8	158.5	38.1	6.91
12.1.1	Hairdressing Salons & personal grooming establishments	75.6	83.1	18.0	91.2	20.6	100.2	23.4	110.0	26.5	4.79
Total	**Leisure Services**	**1449.1**	**1592.0**	**344.7**	**1749.2**	**394.2**	**1921.8**	**449.6**	**2111.8**	**507.9**	**92.2**

Notes:
Per capita leisure expenditure grown at a rate of 1.9% per annum (as per Experian Retail Planner Briefing Note 7.1, Figure 2, 2009).