

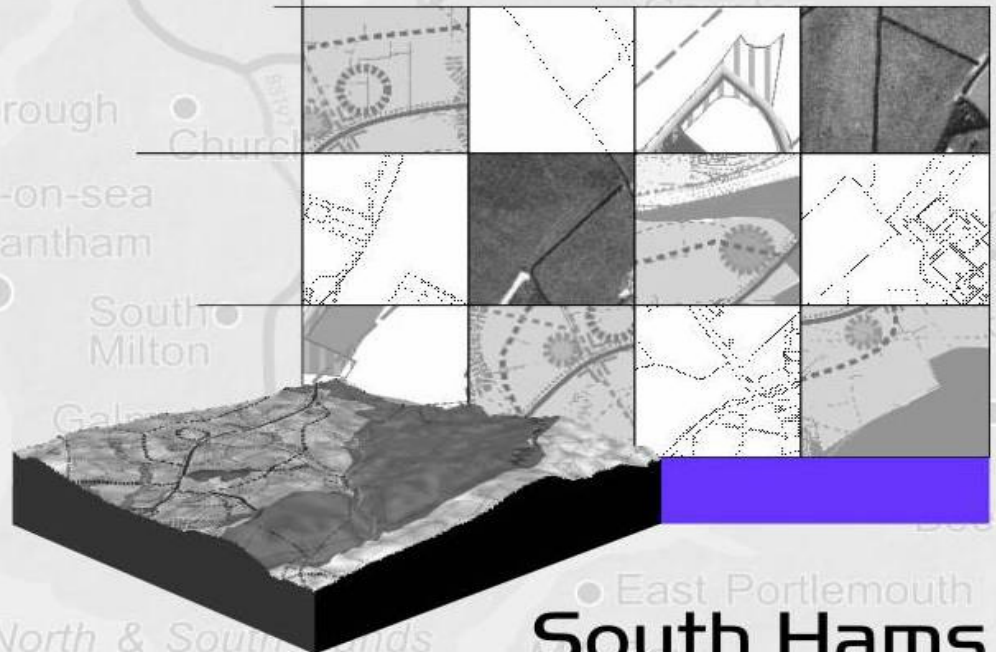


South Hams
District Council

January 2006

Evidence Base

Retail Study



South Hams
Local Development Framework

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EXECUTIVE SUMMARY

1. Government guidance makes clear that sustainable development is the core principle underpinning planning. Accordingly PPS1 sets out a range of overarching policies. These are aimed at facilitating sustainable patterns of urban and rural development through a number of initiatives, including the need to ensure that new developments provide good access to jobs and key services for all members of the community.
2. PPS6 reaffirms the Government's commitment to protecting/sustaining town centres. Accordingly the central objective of the guidance is to promote the vitality and viability of town centres by planning for the growth of existing centres and enhancing existing centres by promoting them as the focus for new development.
3. In allocating sites and assessing proposed development, PPS6 requires local planning authorities to assess the need for the development; identify the appropriate scale, apply the sequential approach, assess the impact on existing centres; and ensure locations are accessible and well served by a choice of means of transport.
4. RPG10 seeks to support and enhance the vitality and viability of existing centres. Local authorities are encouraged to make existing centres more attractive, accessible and better able to attract investment.
5. The Draft Regional Spatial Strategy for the South West aims to provide a regional framework to 2026 and will supersede RPG10 when adopted. It promotes the merits of sustainable development reaffirming urban areas and existing centres should be the focus for development.
6. The Devon Structure Plan seeks to safeguard the vitality and viability of existing centres, in order to allow these centres to evolve to the changing needs of consumers and retailers, and to guide shopping provision into a more sustainable form.
7. The South Hams Local Plan, adopted in April 1996, identifies the Area Centres within South Hams as Totnes, Dartmouth, Ivybridge and Kingsbridge. It identifies the Local Centres as Modbury, Salcombe, Stokenham/Chillington, Yealmpton and Woolwell.
8. These centres are identified as providing an important focal point, both economically and socially to surrounding rural area. Accordingly the retention of shopping facilities and services is seen as important and these centres should form the focus of future commercial development within the District. Whilst these centres are identified as primarily serving localised

catchments they are also important to the tourism trade and contain numerous independent retail outlets.

9. National retail trends indicate a slowdown in the growth of retail sales. There is a continued decline in the number of shops and a further shift of retail activity to fewer, larger centres. This pattern applies both at the strategic level, where the growth of competing sub-regional centres pose a major challenge to the town centres within the District, and at the local level where sales are increasingly becoming focused into a network of large dominant food stores.
10. As a result many small towns are struggling to maintain their role and retain and attract multiple retailers. These towns are increasingly reliant on their convenience and services function, and independent rather than multiple retailers. However, this does provide opportunities for smaller towns to reinforce their distinctiveness and brand themselves accordingly.
11. The South Hams comprises an important tourism market and attracts a significant number of visitors. The growth area in the domestic market is in day trips and short breaks. These trends present significant opportunities and challenges to the centres within the district.
12. The study examines the health of the main South Hams town centres and examines the scope for further retail development within the South Hams. It concludes that, while the centres differ slightly in scale and provision, all of them appear relatively vibrant, strong and healthy and no major problems have been identified in any of them. Comparisons with national averages confirm favourable assessments of the viability and vitality of each of the South Hams retail centres.
13. The study concludes that the LDF should continue the approach advocated by both national, regional and county policy and existing local planning policy, of continuing to promote the existing viability and vitality of the South Hams town centres.

1. Introduction

- 1.1 It is necessary for the Council to undertake a retail study of the District to help inform the Local Development Framework (LDF).

Purpose

- 1.2 The purpose of the study is to guide and inform retail planning in the District, to provide a technical basis for preparing the LDF and to provide a sound and objective basis upon which to assess retail planning applications.

- 1.3 The study includes:

- An assessment of each retail centre within the district;
- An assessment of the overall need for additional retail floorspace, for each centre within the District, having regard to vitality and viability of each centre;
- The identification of deficiencies or gaps in retail provision within the district;
- An assessment of the capacity of the existing centres to accommodate new development; and
- An assessment of the accessibility of the town centres by private car and alternative modes of transport.

Structure

- 1.5 Section 2 of this study sets out the policy framework within which the existing development plan should be assessed and within which the Local Development Framework must be progressed. Accordingly this section highlights key policy objectives, the pertinent aspects of national planning guidance and the aspirations of regional guidance. Building on this, Section 3 considers the provisions of the existing Development Plan and the objectives of the emerging Local Development Framework.

- 1.6 Section 4 considers recent trends in retail provision and the connotations of these on provision within the District's key centres. The sub-regional context is reviewed in section 5, focusing in particular on the District's role within the wider hinterland, the attraction of competing centres and the resulting influence of rival destinations.

- 1.7 Having reviewed the attraction of competing centres, Totnes, Dartmouth, Ivybridge and Kingsbridge are considered in Section 5, having regard to the wider trends, the provision of retail facilities, the merits of the wider environment and each centres overall vitality and viability.
- 1.8 Section 6 focuses on the capacity for additional retail development in the district.
- 1.9 Bringing together the results of the analysis, the conclusions and recommendations for retail development are set in Section 7.

2. Planning Policy Framework

- 2.1 This section considers the central themes of planning policy and the resulting framework within which development plans and planning applications are progressed, highlighting the objectives of national and regional guidance.

Delivering Sustainable Development

- 2.2 The Government is continuing to take forward a major programme of reform to the planning system to support its drive to create sustainable communities, promote sustainable development and achieve a better balance of housing supply and demand.
- 2.3 The Planning and Compulsory Purchase Act came into force on 28th September 2004. The Act sets a statutory objective for development plans to contribute to the achievement of sustainable development, placing sustainability objectives at the heart of the planning system.
- 2.4 Planning Policy Statement (PPS) 1; Delivering Sustainable Development, issued in February 2005, sets out the overarching planning policies on the delivery of sustainable development through the planning system. In promoting sustainable development, the Government reaffirms through the guidance that, amongst other things, the planning system needs to:
 - Recognise that economic development can deliver environmental and social benefits;
 - Make suitable land available for development in line with economic, social and environmental objectives;
 - Promote urban and rural regeneration and promote mixed use developments;

- Provide improved access for all jobs, health, education, shops, leisure and community facilities, open space, sport and recreation;
- Promote the more efficient use of land through higher density, mixed use development and the use of suitably located previously developed land and buildings.

PPS6 - Planning for Town Centres, March 2005

- 2.5 PPS6 was issued in March 2005 and supersedes the previous guidance contained in PPG6, Town Centre and Retail Development. The central message of the guidance is the need for a more proactive approach to securing new investment in centres, and achieving more sustainable patterns of development.
- 2.6 The previous guidance (PPG6) had four objectives, with equal weighting attached to promoting/sustaining town centres and promoting a range and choice of retailing and innovation. PPS6 shifts this emphasis and focuses on protecting/sustaining town centres. It emphasises the Government's key objectives for town centres are to promote their vitality and viability by:
- Planning for the growth and development of existing centres; and
 - Promoting and enhancing existing centre, by focusing development in such centres and encouraging a wide range of services in a good environment, accessible by all.
- 2.7 City, town and district centres are all classed as town centres. PPS6 recognises that town centres will normally be the principal centre or centres in a local authority's area. In rural areas they are likely to function as important service centres, providing a range of facilities and services. District centres are defined as usually comprising groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. Small parades of shops of purely neighbourhood significance are not regarded as centres in policy terms.
- 2.8 It makes clear that, in addition to retail uses, town centre policy relates to a number of additional uses, including leisure, entertainment, recreational, office and cultural and tourism uses.
- 2.9 It encourages Planning Authorities to actively plan for growth and change in town centres over the period of their development plan documents by:
- Selecting appropriate existing centres to accommodate the identified need for growth by:

- Making better use of existing land and buildings, including where appropriate, redevelopment;
- Where necessary, extending the centre.
- Managing the role and function of existing centres by, for example, promoting and developing a specialist or new role and encouraging specific types of uses in some centres; and
- Planning for new centres of an appropriate scale in areas of significant growth or where there are deficiencies in the existing network of centres.

2.10 In selecting sites for development, PPS6 requires local planning authorities to:

- a) Assess the need for development.
- b) Identify the appropriate scale of development
- c) Apply the sequential approach to site selection which requires that locations are considered in the following order:
 - First, locations in appropriate existing centres where suitable sites or buildings for conversion are, or are likely to become, available within the development plan document period, taking account of an appropriate scale of development in relation to the role and function of the centre;
 - Edge-of-centre locations, with preference given to sites that are or will be well connected to the centre;
 - Out-of-centre sites, with preference given to sites which are or will be served by choice of means of transport and which are close to the centre and have a high likelihood of forming links with the centre.
- d) Assess impact
- e) Ensure locations are accessible

2.11 The “centre” for a retail development constitutes the primary shopping area whilst for all other main town centre uses, the “centre” should be regarded as the area embraced by the town centre boundary. PPS6 defines the primary shopping area as the area where retail development is concentrated, generally comprising primary and secondary shopping frontages, which are contiguous and closely related to the primary shopping frontage. Primary frontages are the frontages that are likely to

- include a high proportion of retail uses. Secondary frontages are defined as those that provide greater opportunities for a diversity of uses.
- 2.12 Town centres are defined as including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. For retail purposes, edge of centre sites are generally considered to be those outside the primary shopping area, but within easy walking distance (i.e. up to 300 metres) of the primary shopping area. For all other main town centre uses edge of centre is likely to be within 200 metres of a town centre boundary.
- 2.13 Notwithstanding this, in determining whether a site falls within the definition of edge-of-centre PPS6 advises that planning authorities should take account of local circumstances, such as barriers to pedestrian movement, such as crossing major roads or car parks and the attractiveness and perceived safety of the route. A site is not well connected to the centre where it is physically separated from it by a barrier such as major road and where there is no existing or proposed pedestrian route which provides safe and convenient access to the centre.
- 2.14 PPS6 makes clear that in planning for growth in town centres, local planning authorities should allocate sufficient sites to meet the needs identified, for at least the first five years from the adoption of their development plan documents, although it does acknowledge that for larger schemes a longer period may be appropriate to allow for site assembly.
- 2.15 In assessing proposed developments, PPS6 confirms that the key considerations are the same as those for allocating sites in development plan documents, as outlined above.

PPG13 - Transport, March 2001

- 2.16 PPG13 reaffirms the Government's policy position towards retail development, as outlined in PPG6 and Draft PPS6. In particular it endorses the need to promote the vitality and viability of existing town centres, which should be the preferred locations for new retail and leisure developments. It requires retail development to adopt a sequential approach, with preference given to town centre sites, followed by edge of centre and, only then, out of centre sites in locations which are (or will be) well served by public transport.
- 2.17 PPG13 notes that if there is clearly an established need for such development and it cannot be accommodated in or on the edge of existing centres, it may be appropriate to combine the proposal with existing out of centre developments, provided that improvements to public transport can

be negotiated. It requires that development plans set maximum levels for parking and makes clear that there should be no minimum standards for development, other than for parking for the disabled.

Regional Planning Guidance for the South West (September 2001)

- 2.18 Until it is superseded by the South West Regional Spatial Strategy, Regional Planning Guidance (RPG10) sets out the most up to date regional guidance for the South West, providing a framework through to 2016.
- 2.19 RPG10 guides developments which attract large numbers of people, including retailing, leisure, commercial activity and public facilities, to the centres of Principal Urban Areas (PUAs) and other centres designated for growth specified in the strategy. It encourages town centre developments of an appropriate scale in the market towns and larger settlements. Such development should be located where it will contribute to the regeneration and environmental improvement of town centres, help reduce the need to travel, encourage journeys by non car modes and contribute to the regeneration and environmental improvement of town centres.
- 2.20 It seeks to support and enhance the vitality and viability of existing centres by assessing the need for new development and by applying the PPS6 sequential approach to site selection for new retail and leisure developments. The guidance discourages further provision for proposals to build or extend major regional or sub-regional out-of-town shopping centres.

Draft South West Regional Spatial Strategy

- 2.21 Once adopted (currently programmed mid to late 2007) the emerging South West Regional Spatial Strategy (RSS) will provide the statutory regional framework for development in the south west through to 2026, setting out scale, priorities and broad locations for change.
- 2.22 In a similar way to RPG10, the Draft RSS promotes the merits of sustainable development reaffirming that urban areas and existing centres should be the focus for development. Accordingly town centres are promoted as the focal point for the development of a mixture of uses to include leisure, services, retail, residential and commercial.

3. The Development Plan

Devon Structure Plan 2001 to 2016

- 3.1 The replacement structure plan for Devon was adopted in October 2004 and covers the period to 2016. Structure Plans have been abolished under the Planning and Compulsory Purchase Act 2004, but the Devon Structure Plan is saved for the three years from its adoption or until replaced by the new RSS.
- 3.2 The Structure Plan's policies seek to safeguard the vitality and viability of existing town centres and sustain or enhance them through continuing new investment and regeneration. Within the County, a range of shopping facilities should be maintained at all levels in the settlement hierarchy. Within South Hams, Totnes, Ivybridge, Dartmouth and Kingsbridge are identified as Area Centres, whilst Modbury, Salcombe, Yealmpton, Woolwell and Stokenham/Chillington are identified as local centres.
- 3.3 The Structure Plan does not include a land allocation for the provision of additional retail floorspace. Where a need for additional retail facilities can be identified such facilities should be provided within town centres. Where a town centre location is not available or appropriate, edge of centre sites may be acceptable. Only where such sites are also unavailable should out of centre locations be considered.

South Hams Local Plan

- 3.4 The South Hams Local Plan was adopted in April 1996 and provides a detailed policy framework for the District. It is divided into six parts, Part 1: General Policies sets out district wide policies and Parts 2-6 cover area specific issues for Dartmouth, Ivybridge, Kingsbridge, Modbury and Totnes. The majority of these policies are still relevant today and the plan is 'saved' for at least three years under the Planning and Compulsory Purchase Act 2004 until September 2007 or until such time that it is replaced by a Local Development Framework document.
- 3.5 The local plan aims to secure the continued viability and vitality of the town centres and rural communities to sustain a good range of shopping facilities which will meet the needs of the community. It recognises the importance of village shops in meeting the needs of the local community in a sustainable way and that they should be retained wherever possible.
- 3.6 It contains a Central Shopping Area (CSA) policy for all town centres including, Dartmouth, Totnes, Kingsbridge, Salcombe, Ivybridge and Modbury which seeks to concentrate shopping development at these centres to maintain their vitality and prosperity. The Council resists

shopping development on out of town or edge of town sites. Policy SHDC 23: Shopping in Towns makes it clear that in considering planning applications the Council will give priority to increasing the vitality and viability of town centres. Within the CSAs, the policy supports the introduction of retail uses within Use Class A1. Policy SHDC 23 makes it clear that proposals for non-shopping use, including Uses Classes A2 (Financial and Professional Services) and A3 (Food and Drink) of ground floor premises will be permitted, providing it would not:-

- Undermine the shopping character of the street;
- Detract from the appearance of the immediate environment; or
- Adversely affect the amenity of the surrounding area through consequent noise, smell, litter, congestion on pavements or disturbance arising from late opening hours.

3.7 Policy SHDC 23 also makes it clear that retail development will not be permitted outside the CSAs of these towns unless it is Use Class A1 and the proposal is for:

- Small shops in outlying residential estates (not more than 46 sq.m. (500 sq.ft.) net);or
- Small scale retail outlets ancillary and subsidiary to industrial, craft or service uses.

3.8 The local plan also recognises that village shops and post offices are an important part of community life, and the Council will seek their retention and encourage new provision where this is clearly geared towards local needs. Policy SHDC 25: Shopping in Villages and the Countryside states that proposals for small new shops (not more than 46 sq.m. (500 sq.ft) net) including farm shops, will be permitted in villages and the countryside provided they are clearly intended to serve no more than the local community or, in the case of farm shops, will clearly be limited to the sale of produce grown on the farm where the shop is sited.

South Hams First Deposit Local Plan Review

3.9 The Council began the process of reviewing its 1996 local plan and produced a First Deposit Local Plan Review document in January 2002. This plan retained the adopted local plan CSA policy for all town centres. However, the policy was extended to include a retail heart or 'core zone' within the CSA where concentrations of Use Class A1 of the use Classes Order 1987 retail uses are generally predominant. It sought to prevent the loss of A1 uses within this zone and aimed to maintain a predominantly A1

retail frontage with non-retail uses dispersed throughout the town rather than being concentrated in groups. A percentage threshold for A1 uses of shop frontages within the core zone was set for each town and, changes of use from retail to non-retail uses were permissible under the policy provided that they would not result in the percentage of shop frontage in A1 use falling below the threshold.

South Hams Local Development Framework

- 3.10 Following the introduction of the Planning and Compulsory Purchase Act in 2004 the Statutory Development Plan is to consist of:
- i) Regional Spatial Strategies, to be prepared by the Regional Planning Bodies (considered above); and
 - ii) Local Development Framework to be prepared by local authorities.
- 3.11 Guidance within PPS12 makes it clear that the local development documents, to include statutory development plan documents and non-statutory supplementary planning documents, should collectively deliver the spatial planning strategy for the local planning authority's area. The Core Strategy should set out the key elements of the planning framework for the area. Once adopted, all other development plan documents must be in conformity with it.
- 3.12 This analysis provided within this study will inform the Core Strategy, the Core Policies and the site specific allocations of the LDF.

4. Retail Trends

- 4.1 This section examines key trends and drivers for change in the retail and leisure industry. This review is drawn from a range of data sources, including information purchased from Experian/GOAD and data from other published retail studies.
- 4.2 To undertake an assessment of the quality of existing provision and the need for additional floor space, it is relevant to consider wider national economic and social trends likely to influence retailing within the District.

Income and Expenditure

- 4.3 The retail sector has seen significant changes over the last 25 years, which have fundamentally altered the way we shop. One of the main drivers behind change has been the growth in incomes and expenditure.

Consumer retail expenditure per head over the last 25-30 years has grown at an average compound rate of about 3% per annum in real terms, but most of this growth has been in comparison goods, with virtually no increase in convenience goods expenditure.

- 4.4 Over the same period comparison goods expenditure per head has grown by nearly 5% per annum in real terms, i.e. an overall increase of over 200% in real terms over the last 25 years. In contrast, convenience goods expenditure per head has increased at less than 1% per annum in real terms. Over the last 15-20 years even stronger growth has occurred, particularly in recent years. Such very strong expenditure growth trends are unlikely to continue, but reasonably strong growth in line with long term trends appears probable over the medium to long term.
- 4.5 Strong income and expenditure trends have also affected retailing in another important way – the rise in car ownership and mobility. Over the last 25 years the number of households owning one or more cars has increased from about 55% to about 75%. Equally significant, the number of households with two or more cars has nearly trebled from 11% to 30%. Households are now much more mobile than they used to be and therefore their choices for shopping centres to visit and the distances they can travel are much greater.

Out-of-Town Retailing

- 4.6 Over the past 10 years, there has been substantial growth in out-of town retailing. While retail sales as a whole increased by 62.1%, sales from out-of-town stores grew nearly twice as fast, at 118%. Out-of town retail parks have provided retailers with larger, lower cost units than in town centre locations and they have used this opportunity to broaden their range of products and drive down prices. This has applied not only to grocers' superstores and bulky goods retailers but also, if carefully applied, for a growing number of high street retailers.
- 4.7 In terms of individual sectors, DIY is expected to be the fastest growing out-of town sector. Clothing and footwear are expected to be the second fastest growing out-of town as retailers take up more spacious accommodation on retail parks. General merchandise retailers are also expected to grow strongly.
- 4.8 Given the limited range of comparison retailing in the South Hams, such trends are likely to compound existing needs and enhance further the appeal of such retail destinations in larger centres, such as Torbay/Newton Abbot and Plymouth.

- 4.9 Grocers' out-of town sales are expected to grow more slowly than other sectors but it will remain the largest sector accounting for 65.5% of all out-of town sales. This rate of growth is much faster than the 15.4% growth expected in spending on food due to the increasing quantity of space large scale out of centre stores are dedicating to non-food products – where demand is growing more strongly.

Town Centre Retailing

- 4.10 Despite the growth of out-of town retailing, high street retailers (including those in shopping centres) reported sales of £122.7 billion in 2003, 49.1% of the money spent by consumers on retail. Notwithstanding the growth of out of centre retailing and online retailing, the High Street's share of all retail spending is only fractionally down on its 50.8% share of 10 years ago. This is primarily because it is the convenience goods retailers located in the neighbourhood that have born the brunt of this migration of shoppers to out of centre locations and not the high street.
- 4.11 However, the High Street has become a high cost location. A shortage of units in prime locations has put upward pressure on already high rents, employment, insurance and distribution/servicing costs are rising, as are tax burdens for retailers signing new leases. Despite these difficulties many high street retailers are thriving.. The most important ingredient for reinforcing margins appears to be a distinctive product offer.
- 4.12 Perhaps the most encouraging indicator of the long term health of the high street is the strong pipeline of new developments over the next five years. As planning consent for out-of town sites has become harder to gain, developers have switched their attention back to the city centre. However, currently the majority of these 'in centre' proposals are focused on the larger centres including Plymouth and Exeter which have major redevelopment projects of their central shopping areas underway. Whilst in accord with Government Guidance, such projects pose a potential threat to centres within the South Hams, where development opportunities are typically limited.

Number of Shop Units

- 4.13 National retail trends indicate a continuing contraction in the number of shop units. Total store numbers in the UK have declined by 11% over the last 10 years. This masks variations in the decline of different types of stores and different locations. With the emergence and growth of superstores during the 1990s, there has been a decline in the number of smaller and more specialist food retailers. The number of food specialists has declined by 19% from 48,301 in 1992 to 39,131 in 2002. The number

of large superstores has increased by 50% from 860 in 1992 to 1,292 in 2002.

- 4.14 During 1992-2002 leading supermarket multiples increased their share of the grocery market, as a result of the success of the superstore format. Superstores have grown their market share from 30% in 1992 to just over 40% in 2002. The continued growth of larger, national brand, supermarkets will inevitably have an impact on smaller stores within districts such as South Hams.

Retail Polarisation

- 4.15 The last few years have seen a sustained fall in out-of town shopping centre and retail park development and instead a corresponding resurgence in activity has been concentrated into a few large schemes in dominant regional centres. The top 70 centres in the country now attract over 50% of the country's population for comparison goods shopping.
- 4.16 The growth of multiple traders and increased competition between traders has meant that the retail structure is increasingly dominated by large companies. In tandem with this change, multiple occupiers have pushed for larger shop units. Shopping centres which have been able to accommodate this demand for larger sized units (typically 500-2,000 sq m or larger in the largest centres) have grown in importance, reinforcing the trend of higher order centres growing in relative importance, i.e. polarisation in the retail hierarchy.

The Internet and Non Store Trading

- 4.17 Home shopping (mail order and internet shopping) is the main component of non-store retailing. In total, non-store retailing amounts to about 7% of comparison goods expenditure. The growth of internet shopping has been phenomenal over the last few years, but from a very small base. It is estimated that about 5% of retail expenditure is now conducted on the internet,

Retail and Leisure

- 4.18 Consumers increasingly view retail as a leisure activity. There is an emerging trend towards the development of mixed use retail and leisure schemes. Many new shopping centres and those currently under construction, go beyond retail to include a selection of restaurants, bars and often multiplex cinemas, health clubs and bowling alleys.
- 4.19 The High Street has, so far, been slow to adapt to the changing working patterns of consumers. Whilst most out of town retail parks stay open into

the evening, high streets typically shut for business at 17:30 – the same as most shoppers finish work. High Street operators will need to address this drawback if they are to fight off competition from out of town retail parks. The increasing leisure emphasis in town and city centres may provide an ideal catalyst for this – bars, restaurants, cinemas and other entertainment attract footfall later into the evening which could be exploited by retailers.

Convenience Retailers

- 4.20 The leading food store operators are continuing to innovate to increase their market share. Some have developed smaller store formats such as Tesco Metro and Sainsbury's Local and have been more innovative in their town centre proposals. Discount retailers continue to seek opportunities to expand their networks. There has also been a growth in 'forecourt' retailing, operated either by the large supermarket chains or the major oil companies.
- 4.21 The growing share of the supermarket multiples has primarily been driven by the performance of four players – Tesco, Asda, Morrisons and the Co-Op, which between them have put 9.8% on their combined market shares over this period. These players have emerged as the leading sales winners among UK grocers, while the rest of the market has typically struggled.
- 4.22 At a national level the pressure for larger superstores and hypermarkets will continue, although any further proposals for expansion of existing out of centre convenience stores must be considered in terms of need, sequential approach, appropriateness of scale and impact.

Market Towns

- 4.23 As a result of many of the trends considered above many small towns are facing issues of decline, and are struggling to maintain their role as the economic focus for town residents and those in the surrounding areas. Many people living in small towns and rural areas choose to travel to more distant shopping centres when shopping for food in bulk and for major comparison items, in order to enjoy the benefits of wider choice, easy parking and the amenities provided by larger retail complexes.
- 4.24 The retail market is undergoing continuous change and is increasingly competitive and as detailed, all town centres are being affected by these trends. Of the 1,400 or so main retail centres in Britain, about 1,000 are in decline relative to the faster growing larger centres, so the gap between large and small centres is continuing to widen. Significant new retail development in smaller centres is now rarely financially viable, and such

centres are not able to attract multiple retailers. Smaller towns face the future increasingly reliant on independent rather than multiple retailers

- 4.25 However, the growing dependency on independent operators does provide small towns with an opportunity to reinforce their distinctiveness. Market Towns are being encouraged to think beyond simply retailing; traditionally such centres have provided a variety of functions for local residents. Restaurants, bars, video shops and other related leisure-related business are expanding. Service businesses such as fitness clubs are growing and other such as medical and dental practices, are changing their way of operating so that they become suitable for retail premises in or near town centres.
- 4.26 Many commentators consider that the future of retailing in most small towns will depend on towns building on existing consumer loyalties and marketing themselves appropriately, to include initiatives such as:
- Developing a reputation for excellent customer care;
 - Offering speciality shops;
 - Cultivating distinctiveness; and
 - Offering attractions and events that visitors can combine with shopping.

These factors are of considerable relevance and significance to the South Hams

Rural Services

- 4.27 The Rural White Paper (2000) examined the key issues facing rural areas. It found that around a third of all villages have no shop and the loss of banks, garages and pubs in rural areas has continued. It noted that the decline in village shops was steady in the 1970s, but has slowed since. The Rural Services Survey (2000) indicated that most rural settlements have neither a general store (78%) nor a small village shop (72%), however, 80% of rural households live within 4 km of a supermarket.
- 4.28 Rural banks and building societies are primarily concentrated in market towns, with populations above 3,000 people. The Countryside Agency has identified a relatively small reduction in the number of rural banks and building societies in recent years. Currently 9% of parishes have such a facility, compared with 11% in 1991. In addition despite this fall, 78.4% of rural households live within 4km of a bank or building society (Rural Services Survey, 2000). However, with increasing levels of telephone and internet banking the presence of such facilities may decline further.

- 4.29 The number of post offices in rural areas has declined over the last decade. The Countryside Agency has examined the closure of post offices and data from parish surveys revealed that 58% of parishes had a post office in 1991, compared with 54% in 2000.
- 4.30 Post offices in rural areas play a vital role in serving the rural catchments for financial services and public information. A Study by Postwatch, a watchdog organisation, in late 2002 found that the closure of the rural post office appeared to have far-reaching effects upon both particular individuals and the community in general. It became apparent that the post office played an extremely important role in the rural community for a variety of reasons, including free community services, government information, community notice boards and for social reasons. The closure of post offices therefore has a number of unseen knock-on effects. The study indicated that local businesses reported a reduction in trade, as a result of post office closure and rural residents felt that the community spirit in the villages was badly affected. These issues are familiar in the South Hams where many villages have experienced the loss of such facilities.

5.0 Retailing in the South Hams

Totnes

- 5.1 Totnes is an attractive town which benefits from its natural setting together with its historic environment. The historic legacy and nature of the centre has dictated the layout of the town centre, including the main shopping street of Fore Street and High Street, both of which rise steeply to the castle. The town centre supports a great mix of building styles with a Conservation Area covering a large part of the town including the two main shopping streets.
- 5.2 Given the environmental and historic nature of the centre, the appeal of the town as a unique retail and leisure destination is well established. Totnes represents the administrative centre of South Hams and the largest of retail centres even though in population terms the town is smaller than the districts' largest town, Ivybridge. The town is designated an Area Centre and provides an important focus for a wide rural hinterland. It is located in the eastern part of the district in close proximity to the Torbay conurbation (and Newton Abbot).
- 5.3 The town is recognised as one of the most historic towns in the country, which is reflected in its medieval layout and historic castle. The population of the town is approximately 8,000. Totnes is at the head of the retail hierarchy in the South Hams and plays a distinct role in the economic and

social life of the district. The popularity of the town is reflected in its retail facilities and role it plays in the retail hierarchy.

Retail Composition

- 5.4 Totnes is the largest retail centre in the South Hams and supports 212 units as defined by Experian GOAD (2005). This level of units accounts for approximately 30,660m² which is over 10,000m² larger than its nearest competitor, Kingsbridge. It is evident that Totnes performs an important retail function. The town supports the highest proportion of operational retail (convenience and comparison) uses in the South Hams, which account for 73% of all town centre units. This is over 17% higher than the national average.
- 5.5 Convenience facilities account for approximately 9,480 m² of retail floorspace contained within 27 units, with comparison units providing for 14,770m² within 128 units. Convenience floorspace is well provided for at 31% which exceeds the national average by 14%. Two large supermarkets, Sainsbury and Somerfield operate in the town which together with greengrocers, fishmongers and butchers which are particularly well represented, contribute to a good supply of convenience retail facilities. Similarly, the strength of the retail role is reflected by the 60% of units in use for comparison uses. The town includes an above average representation of mixed clothing, books, furniture/carpets/textiles and china/glass and gift products.

Table 1: Totnes Trade Mix

	Floorspace (m ²) (000's)	Proportion of floorspace (%)	GB average %
Convenience	9.48	31	17
Comparison	14.77	48	53
Service	5.95	19	21
Vacant	0.46	2	8
Total:	30.66		

Source: Experian GOAD, 2005

Table 2: Retail Outlets in Totnes

	No. of Outlets	Percentage of Outlets in Totnes	GB average % of outlets
Convenience	27	13	9
Comparison	128	60	47
Service	52	24	32
Vacant	5	2	10
Total:	212		

Source: Experian GOAD, 2005

- 5.6 Given the high level of retail uses, it is unsurprising that the proportion of service units is lower than the national average, accounting for 24% of centre composition. Vacant units in the town centre account for 2% of total provision. This is significantly lower than the national average. Totnes also supports a large amount of charity shops with 10 identified.
- 5.7 A good number of multiple retailers trade in Totnes (approximately a fifth of all retail operators). This is however lower than the national average of 34%. Comparison multiples include Edinburgh Woolen Mill Knitwear, Peacocks clothing, Superdrug, Woolworths and Boots. The role of small, independent operators is particularly evident in Totnes, and is considered an important characteristic and attraction of the centre. Service use types broadly mirror the national average although are slightly below, with the majority of services associated with the restaurant/café/food sector (23 units) and banking/financial services (7 units).
- 5.8 The primary shopping area is focussed along the historic Fore Street and extends into High Street. A number of units also extend into secondary shopping areas to the south of Fore Street at the Plains together with the northern area of High Street towards Plymouth Road. A number of courtyards and markets also add to the extension of the retail facilities. The two supermarkets (Safeway and Somerfield) are located in close proximity to the central shopping area.

Dartmouth

- 5.9 Dartmouth is located on the west bank of the Dart Estuary in the eastern part of the South Hams. The town represents one of the most attractive coastal towns in the south west and has developed on a strong maritime theme as a port and naval college. The topography of the town's setting on a steep hillside has restricted levels of development in Dartmouth although the town supports a population of approximately 5,800.
- 5.10 The primary shopping area is located in close proximity to the attractive marina and is focussed along Fairfax Street and Duke Street. Secondary shopping locations are focused on the market place and along the pedestrianised Foss Street. Given the size of Dartmouth, the town is designated an Area Centre and it serves an important function in providing shops and services for the surrounding rural area. The town is a popular location for both retirement and second home ownership but also acts as an important tourism destination.

Retail Composition

- 5.11 In floorspace terms, Dartmouth represents the third largest retail centre in the district with a total floorspace of 16,820 m². It comprises 158 units, 102

of which provide for comparison and convenience goods. Convenience units account for 8% of total provision. This is slightly lower than the national average of 9%. By contrast, the percentage of comparison units in the centre (56%) is higher than the national average at 47%. Service composition at 31% broadly accords with the national average of 32%.

Table 3: Dartmouth Trade Mix

	Floorspace (m ²) (000's)	Proportion of floorspace (%)	GB average %
Convenience	2.42	14	17
Comparison	8.92	53	53
Service	4.55	27	21
Vacant	0.93	5	8
Total:	16.82		

Source: Experian GOAD, 2004

Table 4: Retail Outlets in Dartmouth

	No. of Outlets	Percentage of Outlets in Dartmouth	GB average % of outlets
Convenience	13	8	9
Comparison	89	56	47
Service	49	31	32
Vacant	7	4	10
Total:	158		

Source: Experian GOAD, 2004

5.12 The Area Centre status of Dartmouth is reflected by the retail composition of the centre although the importance of tourism to the local economy is also apparent. Overall, the retail composition of Dartmouth is healthy with operational retail units accounting for 64% of total town centre provision. This is over 8% higher than the national composition of the average town centre. The comparison provision of the town is particularly healthy, reflecting the number of tourist related units in the centre.

5.13 Comparison retailers include Woolworths, Boots and Lloyds Pharmacy together with a large number of comparison outlets (89 in total), which are dominated by local independent traders. The importance of tourism to the centre is confirmed by the number of gift, china and craft shops which is four times the national average. There is also a healthy number of sailing and water based recreation clothing shops.

- 5.14 Service units are also well represented in the town, particularly restaurants and food outlets. There are also an above average number of estate agents, confirming the strength of the local property market, particularly from the second home market. Bank and financial services provision however approximately half the national average.
- 5.15 Vacant units in the town centre account for 4% of total provision. This is significantly lower than the national average of 10%, confirming a very healthy centre in active unit terms. In floorspace terms, the convenience function accounts for 14% of town centre floorspace; approximately 3% lower than the national average. By contrast, the comparison function is stronger, accounting for 53% of total floorspace in the centre, in line with the national average. Convenience provision is considered average with a small number of units operated by multiples including a centrally located Somerfield. The centre also supports a good range of independent bakers, butchers and grocers together with small tourist orientated specialist food stores.
- 5.16 The level of multiple representation is significantly lower than the national average. This in part reflects the proximity of the centre to the higher order centres of Torbay and Plymouth. It also confirms the limited range of suitably sized retail units which are constrained by the historic street pattern together with the Conservation Area designation of the town centre and the existence of Listed Buildings.

Ivybridge

- 5.17 Ivybridge is the largest town in the South Hams and had a population of approximately 12,000 in 2002. It is located on the A38 in close proximity to Plymouth and has undergone major growth over the last 25 years. Due to its location many residents commute to work in Plymouth. The town is identified as an Area Centre and provides a range of facilities and services for its residents and the surrounding rural area.
- 5.18 Despite its size, the scale of retail provision at Ivybridge appears to be less than would be expected for such a town. The scale and growth of residential development in the town has led to a major change in its commercial profile. The primary shopping area is focussed along Fore Street and Glanville Road. A pedestrianised shopping precinct, Glanvilles Mill, located to the rear of Fore Street, provides a link from the main car park across the river. There is also a small concentration of retail units providing for a mix of bulky goods, clothing and service, clustered around the Town Hall, adjacent to the main car park.

5.19 In seeking to promote the Area Centre role of Ivybridge, the development plan strategy could seek to promote the development of a more self-contained centre which is less reliant on Plymouth.

Retail Composition

5.20 Ivybridge has a retail floorspace of 10,590 m² which is provided in 82 units (Experian GOAD, 2005). The convenience units account for 14% of the total number of units and comparison units account for 46%. The proportion of convenience units is higher than the national average, however, the proportion of the comparison units is slightly lower than the national average. There are 26 service units in the town which accords with the national average. By contrast, the number of vacant units is lower than the national average with only 5 vacant units.

Table 5: Ivybridge Trade Mix

	Floorspace (m ²) (000's)	Proportion of floorspace (%)	GB average %
Convenience	2.6	24	17
Comparison	4.92	46	53
Service	2.51	23	21
Vacant	0.56	5	8
Total:	10.59		

Source: Experian GOAD, 2005

Table 6: Retail Outlets in Ivybridge

	No. of Outlets	Percentage of Outlets in Ivybridge	GB average % of outlets
Convenience	12	14	9
Comparison	39	46	47
Service	26	31	32
Vacant	5	6	10
Total:	82		

Source: Experian GOAD, 2005

5.21 Ivybridge has a good range of convenience provision with facilities including Somerfield and Thresher together with a range of independent bakers, grocers and general convenience stores. Boots is one of the comparison retailers in the town, however, there a very limited number of multiple retailers and a restricted number of independent stores. There is also a limited range of certain types of comparison goods provision in Ivybridge, including clothing and sports/toys goods for example.

- 5.22 In contrast, service uses are well represented in the town. Bank and financial services provision accord with the national average of 5% and include Barclays, Lloyds and Natwest. There are also a large number of estate agents in the town together with a good number of restaurants and cafes. Clearly, Ivybridge supports a strong level of A2 uses. The retail composition of Ivybridge is markedly different to the other Market Towns in the South Hams and this is largely due to the way in which the town has developed.
- 5.23 Retail facilities at Ivybridge are in competition with a large 24 hour Tesco superstore which is located approximately two miles to the west of Ivybridge, off the A38, at Lee Mill. This facility provides the largest standalone foodstore in the district and acts as the main bulk food destination for much of the western South Hams (alongside facilities on the eastern edge of Plymouth. The competitor role of this Tesco store cannot be underestimated and confirms the need for greater self-containment in the role and function of the Ivybridge centre. Endsleigh Garden Centre, on the edge of town, has greatly expanded in recent years and offers further competition to Ivybridge town centre.

Kingsbridge

- 5.24 Kingsbridge is located in the southern part of the South Hams, at the head of the Kingsbridge Estuary. The town centre is linear in form with the primary shopping area focused along Bridge Street and Church Street. The town is identified as an Area Centre and functions as an important market town which serves an extensive rural and coastal area which is highly popular with tourists. The town has grown steadily over recent years and supports a population of approximately 5,900.
- 5.25 The town provides an important role as a focus for a range of shops and services for a wide catchment area and visitors, reflecting its attractive setting and its ancient street pattern. The town centre is covered by a Conservation Area designation. It is accessible to private cars with car parking at both ends of the primary shopping area, including the Quay and the Fore Street car park. Kingsbridge is not served by a rail station, with the nearest facility located in Totnes, 17 miles to the north. The town is well served by public bus services, including multiple daily services to Dartmouth, Plymouth and the surrounding rural area. However, given the location of Kingsbridge and the wide catchment area it serves, it is not surprising that the town acts as a focus for car borne users.

Retail Composition

- 5.26 The town centre comprises a total of 145 units with a total floorspace of 21,000 m² (Experian GOAD, 2005) In floorspace terms, Kingsbridge is

therefore the second largest in the district after Totnes. Of this total, 93 units provide for comparison and convenience goods (69 units and 24 units respectively). Multiple representation is confined to 35 units; 24% of town centre composition.

- 5.27 The Area Centre status of Kingsbridge is reflected by the retail composition of the centre. In provision terms, convenience units account for 17% of total provision, which is almost twice the national average of 9%. The number of comparison units in the centre are slightly higher than the national average of 47%. In general, the retail composition of the centre broadly accords with the average UK town centre although the convenience function of the town is above average. The development of the Somerfield store in the 1990's added to the level of convenience floorspace in the town. The strength of the convenience function affirms Kingsbridges' importance in serving needs of the surrounding rural area.

Table 7: Kingsbridge Trade Mix

	Floorspace (m ²) (000's)	Proportion of floorspace (%)	GB average %
Convenience	4.92	23	17
Comparison	9.2	44	53
Service	5.3	25	21
Vacant	1.58	8	8
Total:	21		

Source: Experian GOAD, 2004

Table 8: Retail Outlets in Kingsbridge

	No. of Outlets	Percentage of Outlets in Kingsbridge	GB average % of outlets
Convenience	24	17	9
Comparison	69	48	47
Service	42	29	32
Vacant	10	7	10
Total:	145		

Source: Experian GOAD, 2004

- 5.28 Vacant units in the town centre account for 7% of total provision. This is below the national average (10%). A number of units are operated by multiples including Somerfield, Spar, Forbuoys, Thresher, Woolworths, Boots and Peacocks which operate form the largest outlets in the town. The centre also supports a good range of independent bakers, butchers and grocers together with small tourist orientated specialist food stores.

- 5.29 Service uses are well represented in Kingsbridge. Bank and financial services provision (8%) exceed the national average of 4.5% and include HSBC, Barclays, Lloyds and Natwest. The centre also supports an above average representation of estate agents and travel agents. There are also a large number of cafes in the centre, reflecting the importance of the tourism role.
- 5.30 The Council has received a number of development proposals over recent years for a food supermarket on a site at the north-western edge of the town centre between Fore Street and Cookworthy Road which is currently occupied by a car park. To date, none of these proposals have been granted planning permission. The Council has agreed to the principle of a food supermarket in Use Class A1 at this site although any development should be to a high standard of design. The site is locationally and visually very important as it adjoins the town centre and main shopping street, abuts the historic core and is partly within the Kingsbridge Conservation Area.

Modbury

- 5.31 Modbury is an attractive small traditional town located on the A379 between Kingsbridge and Plymouth. The character and setting of the town is heavily influenced by the Conservation Area which covers the majority of Modbury. The town is set in an important landscape with the area to the south of the A379 designated as Area of Outstanding Natural Beauty. Modbury is designated a Local Centre and provides convenience and comparison shopping service facilities for a localised rural catchment area. It also provides facilities for tourists visiting the wider area and passing through the town.
- 5.32 The population of Modbury parish in 2002 was 1,700. The town has experienced a small level of growth in recent years.

Retail Composition

- 5.33 The focus of retail units in Modbury is along Broad Street and Church Street on the A379 which runs through the centre. The main car park is in Poundwell Street which is adjoining Broad Street. Modbury supports a total of 3,720 m² floorspace within the town, contained with 35 units (Experian GOAD, 2005). Table 9 below shows that convenience facilities account for approximately 25% of floorspace within the town and comparison floorspace accounts for 40%. Modbury is characterised by many independent retail units and a very limited number of multiple outlets (4 in total).

Table 9: Modbury Trade Mix

	Floorspace (m ²) (000's)	Proportion of floorspace (%)	GB average %
Convenience	0.93	25	17
Comparison	1.49	40	53
Service	0.93	25	21
Vacant	0.37	10	8
Total:	3.72		

Source: Experian GOAD, 2005

Table 10: Retail Outlets in Modbury

	No. of Outlets	Percentage of Outlets in Modbury	GB average % of outlets
Convenience	6	17	9
Comparison	18	50	47
Service	8	22	32
Vacant	3	8	10
Total:	35		

Source: Experian GOAD, 2005

5.34 67% of retail units in Modbury are in either convenience or comparison use which is approximately 11% higher than the national average. This indicates that in statistical terms it appears that there is a good number and range of retail units in the town and the proportion of uses broadly accords with the national average. However, the level of service units in the town (22%) is less than the national average (32%) which is somewhat surprising given the rural hinterland that Modbury serves. Vacant units account for 8% of total provision, which equates to the national average.

Salcombe

5.35 Salcombe represents the southernmost town in the South Hams. Designated as a Local Centre, the town provides a range of localised services and facilities for a large rural hinterland. Salcombe also acts as an important tourism centre and has developed as one of the most popular and prosperous sailing and water based recreation centres in the south west. The attractive setting of the town is influenced by its role and function as a important harbour located on the southern end of the Kingsbridge Estuary, which lies within the South Devon Area of Outstanding Natural Beauty.

5.36 The primary shopping area at Salcombe, extends along one main thoroughfare, Fore Street. The shopping area continues into the

secondary shopping areas along Union Street and Clifton Place. The historic and environmental character of the town centre ensures that the shopping area is extremely compact in scale and nature.

- 5.37 The tourism function of the town has impacted on the local economy with the local housing market influenced by high value retirement and holiday home ownership. This has impacted significantly on the population profile of the town with many younger locals forced to move away from the town. In 2001, the population of the town was estimated to be approximately 2,200.

Retail Composition

- 5.38 Salcombe supports a total retail floorspace of 7,060 m², contained within 78 units (Experian GOAD, 2005). Convenience and comparison facilities account for 54 units (10 units and 44 units respectively). These units account for over 68% of all units in the centre, which exceeds the national average by 12%. Given this high level of retail uses, it is unsurprising that the proportion of service units is lower than the national average, accounting for 25% of centre composition. Vacant units account for a low 5% of the total provision. This is half the national average of 10%.
- 5.39 In floorspace terms, although convenience outlets are well represented in Salcombe, many are concentrated in small units. This is reflected in the low levels of floorspace devoted to convenience uses which total 8% of all floorspace. Convenience provision is good which is largely attributed to the high level of tourism in the town and surrounding area, however, no convenience multiples operate in the town with all convenience facilities operated by independent retailers. There is a good range of bakers and grocers.

Table 11: Salcombe Trade Mix

	Floorspace (m ²) (000's)	Proportion of floorspace (%)	GB average %
Convenience	0.56	8	17
Comparison	4.27	59	53
Service	1.95	27	21
Vacant	0.28	4	8
Total:	7.06		

Source: Experian GOAD, 2005

Table 12: Retail Outlets in Salcombe

	No. of Outlets	Percentage of Outlets in Salcombe	GB average % of outlets
Convenience	10	13	9
Comparison	44	55	47
Service	20	25	32
Vacant	4	5	10
Total:	78		

Source: Experian GOAD, 2005

- 5.40 The importance and nature of tourism in Salcombe supports a good range of comparison retailers, many of which represent relatively upmarket operators. The link with the sailing community is evident in the nature of clothing stores. Analysis of the composition of the comparison facilities confirm that the town is well represented by designer clothing, gifts/china and crafts goods. The number of exclusive outlets exceeds what would be expected of a settlement of this size. It is considered that Salcombe is able to support these outlets given its prosperous tourist base together with the influence of wealthy second home ownership in the wider area.
- 5.41 By contrast, Salcombe is largely absent of any bulky goods offer, affirming the function and role of the settlement. Although a small number of multiple operators exist, the centre is dominated by independent operators.
- 5.42 Service uses account for 20 units, a quarter of total centre provision, which is slightly lower than the national average. Despite the tourist focus of the town, it could be expected that the levels of service provision in the town would be higher although there is an above average representation of restaurant/food/café outlets and estate agents.
- 5.43 Levels of vacant floorspace in the centre are low. A total of 280 m² were identified in the Experian GOAD 2005 survey, representing 4% of the centre's floorspace. This is approximately half the national average reflecting the healthy nature of the Salcombe retail market.

6. Scope for Retail Development within the South Hams

Retail Market Overview

- 6.1 The retail market in South Hams has been, and continues to be, shaped by a number of factors which have characterised the nature of the retail offer. It is against these issues that emerging LDF retail policy must provide for future needs.
- 6.2 At its fundamental level, South Hams does not contain a major retail centre and as such the district is not dominated by any particular centre. The geographical location of the district however places it between the Principal Urban Areas of Plymouth and Torbay. As consequence, the western part of the district is heavily influenced by Plymouth whilst, to a lesser extent, the eastern part of the district looks to Torbay and Newton Abbot. Given the nature and scale of retail facilities which exist in both major settlements, particularly the Plymouth conurbation, it is unsurprising that retail facilities are more limited and provide for localised needs in many cases.
- 6.3 Although no centre dominates, each of the Area and Local Centres provide important retail and service facilities for an extensive catchment area. A hierarchy can be identified in the district with Totnes the 'main' centre. It is evident that Kingsbridge and Dartmouth provide the next level of the hierarchy which Ivybridge should also provide for. It appears however that the role of this centre has not developed with its own growth over recent years. Similarly within the Local Centres, the strength of Salcombe is evident and in many ways it operates as an Area Centre in retail terms.
- 6.4 Given the scale of the district settlements and the large facilities outside the district to the east and west, it is inevitable that the retail market is characterised by limited large units. With the exception of Tesco at Lee Mill, stand alone retail facilities are minimal. Retail demand is largely driven by localised, convenience top-up needs of residents, with higher order comparison provision focused on the major urban areas.
- 6.5 In retail composition terms, the configuration of the retail centres of the district is constrained in physical, environmental and historical terms. This has implications for end occupiers. It is apparent that the centres of the South Hams are dominated by independent retailers, which may reflect such issues. That said, the absence of national multiples helps to establish a unique and distinctive retail appeal, as in Totnes.
- 6.6 The capacity of retail centres are further constrained by important environmental and historical constraints. This has implications for the

improvement and expansion of existing centres, given the Conservation Area status of many of the centres.

- 6.7 Tourism plays an important role in the South Hams economy and contributes to the economic health of many of the retail centres of the district. Salcombe and Dartmouth are heavily influenced by their tourism base, although such an influence is also significant in Totnes, Kingsbridge and Modbury. The contribution of tourism has greatly influenced the retail composition of the centres which effectively supplement the main local convenience and service role of retail centres. This, however, can create seasonal problems, particularly involving traffic congestion and parking within confined, historical environments. It is also essential that the competing needs of local residents and visitors are catered for.
- 6.1 The following section briefly considers the scope for additional retail provision within the district and includes recommendations for the developing town centre policies in the emerging local development framework (LDF). The main focus of the LDF should be to promote and enhance the existing retail provision of each town centre by supporting redevelopment and continued investment to enhance the convenience, accessibility and attraction of each centre, and to provide criteria based policies against which planning applications can be determined.

Totnes

- 6.2 Totnes should continue to function as the main centre for retail activity within the district, meeting daily needs and for specialist goods. Analysis of the latest statistics indicates that the town is relatively healthy. A major expansion or change to its current role is not anticipated. Whilst the LDF should contain policies that enable the provision of a wide range of food and household goods in the town, it is accepted that Totnes cannot provide the volume of trade and type of shopping available in the larger centres outside the district, such as Torbay/Newton Abbot and Plymouth.
- 6.3 The LDF should seek to encourage new investment into the town centre in order to maintain and enhance the centre's role. Any new development should aim to reinforce the town's distinctive character. The Central Shopping Area (CSA) as defined within the adopted local plan covers an extensive area, stretching from the Plains along the length of Fore Street and High Street. The main food store at Totnes is Morrisons which is not in the CSA and is not considered to form part of the town centre, but rather is regarded as an edge-of-centre location in terms of PPS6.
- 6.4 It is essential that any future development proposals are well integrated into the town centre to ensure that they do not function as separate destinations.

- 6.5 The LDF should seek to differentiate between primary and secondary frontages in order to ensure the core frontages remain the focus for retail activity. The adopted local plan identifies a CSA but it does not distinguish between primary and secondary areas. Primary retail areas should remain the focus of retail activity and any development proposals that seek to change the use of units to non-retail provision should be restricted.

Kingsbridge and Dartmouth

- 6.6 Kingsbridge and Dartmouth town centres provide a range of services and facilities and a good range of shops. The key issue within Kingsbridge and Dartmouth is the need to retain viable town centres in order to protect the quality of life at these towns and they should continue to provide for the needs of the surrounding rural parishes. These centres are considered to be relatively stable and emphasis should be placed on filling vacancies as opposed to providing new development. Any retail growth in the short to medium term should be accommodated, in the first instance and wherever possible, within the town centre.

- 6.7 The LDF should seek to differentiate between primary and secondary frontages in these towns order to ensure the core frontages remain the focus for retail activity. The adopted local plan identifies a CSA but it does not distinguish between primary and secondary areas. Primary retail areas should remain the focus of retail activity and any development proposals that seek to change the use of units to non-retail provision should be restricted.

Ivybridge

- 6.8 Ivybridge has grown considerably in recent years and is now the largest town in the South Hams. However, the scale and rate of housing development at the town have brought major changes to its commercial profile over the past thirty years. The town provides for the shopping needs of a wide rural area, although the superstore at Lee Mill is a major competitor.
- 6.9 The LDF policies for Ivybridge should seek to make the town a more self-sufficient community in terms of providing both services and employment in the area. The LDF should also seek to safeguard the vitality and viability of the town to try to reduce the significant leakage of comparison goods expenditure.
- 6.10 The LDF should seek to differentiate between primary and secondary frontages in order to ensure the core frontages remain the focus for retail activity. The adopted local plan identifies a CSA but it does not distinguish

between primary and secondary areas. Primary retail areas should remain the focus of retail activity and any development proposals that seek to change the use of units to non-retail provision should be restricted.

Modbury and Salcombe

- 6.11 Modbury and Salcombe are the smallest town centres in the district. However, they provide an important role as local shopping centres for surrounding rural area. The Council recognises the benefits that tourism brings to the towns which are helping to support shops and services used by local residents. As with the other centres within the district, the Council supports the development of tourist related facilities that could benefit the viability and vitality of these towns. The LDF should encourage new retail development within the town centres. There is no evidence of demand which would justify an expansion to the existing central shopping areas.

Sherford New Community

- 6.12 Sherford is a strategic proposal for the development of a new community in the South Hams close to Plymouth. It will function as an Area Centre planned to provide 4,000 houses and 18 Ha of employment plus all necessary services and facilities (including retail) in a mixed-use development. In order to achieve a socially and economically sustainable community at Sherford the high street and the neighbourhood centres have been designed as the focus of walkable catchments with a permeable grid of streets giving access to them.
- 6.13 The levels of retail provision within these centres must be balanced to the needs of the residents of Sherford but the viability of the High Street may also require an element of specialist retailing to attract a higher footfall and enhance vitality. This may lead to an element of competition with other centres and extend the catchment of Sherford's beyond the immediate edge of its built area. A Retail Impact Assessment will be required to identify the appropriate level and type of floorspace at Sherford.
- 6.14 The LDF policies for Sherford will need to support the town as a self-sufficient community in terms of providing both services and employment. The LDF should do everything possible to ensure the provision of appropriate retailing within Sherford and in particular to support the vitality and viability of the Sherford centres whilst seeking to minimise the leakage of convenience and comparison goods expenditure resulting from unsustainable travel patterns.
- 6.15 Retail issues associated with Sherford will be explored in more detail in the specific LDF document dealing with Sherford, the Sherford Area Action Plan.

Provision of Rural Services

- 6.16 The South Hams is characterised by its predominantly rural nature, approximately two-thirds of the population live outside the four main towns of Dartmouth, Ivybridge, Kingsbridge and Totnes. Therefore rural isolation and access to necessary services, and facilities is a significant problem for the district. For instance, due to a low concentration of potential passengers one-third of parishes do not have a daily bus service.
- 6.17 The LDF needs to promote and encourage more sustainable local communities, through such mechanisms as the protection of local shops, pubs and post offices. The changing nature of the rural economy, with greater farm diversification needs to be developed to provide the necessary vitality, vibrancy, facilities and services for sustainable rural life.

Conclusion

- 7.1 The retail market in the South Hams is clearly influenced by its positioning between two higher order locations; Plymouth and Torbay. As a consequence, the offer and function of the South Hams centres reflect this level of competitor supply and they provide in the main for convenience and localised comparison needs. In view of the nature of the market, it is unsurprising that the retail industry involvement in the district is limited to mainly convenience provision.
- 7.2 The role of retail facilities outside the main centres cannot be underestimated given the important economic and social function such uses provide in rural areas. Existing plan policy is strongly supportive of safeguarding village shops and other community facilities. It is essential that LDF policy protects this important element of the retail hierarchy
- 7.1 This study provides a retail analysis of the South Hams to help inform the preparation of the emerging Local Plan for the district. The study concludes that, while the existing town centres differ slightly in scale and provision, all of them appear vibrant and healthy and no major problems have been identified in any of them. Comparisons with national averages confirm favourable assessments of the viability and vitality of each of the South Hams retail centres. The results of the study do not appear to justify the allocation of additional retail floorspace to the town centres.
- 7.2 In assessing the health of the main retail centres of the South Hams, the study has sought to provide a snapshot in time, based on a consistent and accepted means of measuring vitality and vitality following the principles of with PPS6. The analysis draws on statistical and subjective assessments of each centre, which has implications for any comparison of centres.

- 7.3 As a consequence, the review of the town centres has focused on retail and commercial statistics which allow for similarities and differences to be identified. Importantly it also provides a measure at a point of time which can assist future monitoring to determine whether a centre has improved or decreased relative to its base measure.
- 7.4 Overall, the study confirms the general health and strength of the main retail centres and provides favourable assessments of the vitality and viability of the town centres. Whilst it is important to recognise the distinct role and function of each town centre in the retail hierarchy, the local needs and service functions maintain vibrant and well used retail facilities, with low vacancy rates and high levels of retail provision. It is essential that LDF strategy strengthens the important economic and social role of these centres.