Appendix C:

Quantitative Need Assessment

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 1: POPULATION OF STUDY AREA, BY SURVEY ZONE (2012-2026)

ZONE	POSTCODE SECTORS	2012	2017	2021	2026	Change, 2012-17 No.	Change, 2012-17 (%)	Change, 2012-21 No.	Change, 2012-21 (%)	Change, 2012-26 No.	Change, 2012-26 (%)
1	EX17 5										
	EX17 6										
	EX6 6										
	EX20 2										
	TOTAL	**14771**	**15401**	**15871**	**16451**	630	4.3	1100	7.4	1680	11.4
2	EX17 1										
	EX17 2										
	EX17 3										
	TOTAL	**8495**	**8775**	**8999**	**9280**	280	3.3	504	5.9	785	9.2
3	EX17 4										
	EX16 8										
	EX36 3										
	EX36 4										
	EX18 7										
	TOTAL	**18267**	**18655**	**19069**	**19585**	388	2.1	802	4.4	1318	7.2
4	TA22 9										
	EX16 9										
	EX16 7										
	TA21 0										
	TOTAL	**14480**	**14955**	**15368**	**15795**	475	3.3	888	6.1	1315	9.1
5	EX16 4										
	EX16 5										
	EX16 6										
	TOTAL	**20875**	**22042**	**22976**	**24143**	1167	5.6	2101	10.1	3268	15.7
6	EX5 3										
	EX5 4										
	EX5 5										
	TOTAL	**10377**	**10893**	**11337**	**11862**	516	5.0	960	9.3	1485	14.3
7	EX15 1										
	EX15 2										
	EX15 3										
	TOTAL	**20964**	**22010**	**22847**	**23893**	1046	5.0	1883	9.0	2929	14.0
TOTAL		**108229**	**112731**	**116467**	**121008**	**4502**	**4.2**	**8238**	**7.6**	**12779**	**11.8**

Notes: Base 2012 population data for each zone taken from Experian Business Strategies data.

Due to the area covered by zones 1, 3, 4 and 6 spanning across the MDDC boundary, data for 2012-2026 from Experian has been adopted.

For Zones 2, 5 and 7 (all of which lie within the MDDC boundary) growth within these zones has been tailored to match ONS sub-national projections for Mid Devon District and the distribution of residential development across Mid Devon on the following basis:

Total population growth per annum from ONS sub-national projections = 543 persons

% of residential development within zones 2, 5 and 7 (from Mid Devon AMR data):

Zone	% of MDDC Growth	Growth pa
2	10%	56
5	43%	233
7	39%	209

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 2: PER CAPITA EXPENDITURE WITHIN STUDY AREA BY GOODS CATEGORY AND ZONE, 2012-2026

A: CONVENIENCE GOODS

ZONE	2012	2016	2021	2026
1	2024	2065	2123	2188
2	1918	1957	2012	2074
3	1931	1969	2025	2087
4	1997	2037	2095	2158
5	1756	1791	1842	1898
6	2007	2048	2106	2169
7	1914	1952	2008	2068

B: CLOTHES & FOOTWEAR GOODS EXPENDITURE

ZONE	2012	2016	2021	2026
1	628	701	813	942
2	603	673	780	905
3	593	661	767	889
4	619	691	801	929
5	567	633	733	850
6	609	679	787	913
7	632	705	817	947

C: FURNITURE, FLOORCOVERING & TEXTILE GOODS

ZONE	2012	2016	2021	2026
1	308	343	398	462
2	291	325	376	436
3	280	312	362	420
4	305	340	395	458
5	243	271	314	364
6	327	365	423	490
7	307	342	397	460

D: DIY & DECORATING GOODS

ZONE	2012	2016	2021	2026
1	369	411	477	553
2	323	361	418	485
3	337	376	436	505
4	359	400	464	538
5	276	308	357	414
6	374	418	484	561
7	327	365	423	490

Notes:

Convenience goods per capita expenditure excludes special forms of trading at 5.9% for the period 2012-2026 and includes the following growth rates: +0.5% between 2012-2017 and +0.6% between 2017-2026.

Comparison goods per capita expenditure excludes special forms of trading at 12.4% for the period 2012-2026 and includes the following growth rates: +2.1% between 2012-2013 and +3% between 2013-2026.

2010 PRICES

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 2 (Continued): PER CAPITA EXPENDITURE WITHIN STUDY AREA BY GOODS CATEGORY AND ZONE, 2012-2026

E: DOMESTIC APPLIANCES

ZONE	2012	2017	2021	2026
1	132	151	170	197
2	147	168	190	220
3	121	139	157	182
4	124	143	160	186
5	132	152	171	198
6	148	170	191	222
7	136	156	176	204

F: TV, HI-FI, RADIO, PHOTOGRAPHIC & COMPUTER GOODS

ZONE	2012	2017	2021	2026
1	380	437	492	570
2	365	419	472	547
3	364	418	471	546
4	376	432	486	563
5	344	395	444	515
6	401	460	518	601
7	404	464	523	606

G: PERSONAL & LUXURY GOODS

ZONE	2012	2017	2021	2026
1	521	599	674	781
2	554	636	716	830
3	468	538	605	702
4	509	585	658	763
5	484	557	627	726
6	584	671	755	875
7	557	641	721	836

H: RECREATIONAL GOODS

ZONE	2012	2017	2021	2026
1	594	682	768	890
2	508	584	657	762
3	525	603	679	787
4	573	659	741	859
5	448	514	579	671
6	572	658	740	858
7	548	630	709	822

Notes:
Comparison goods per capita expenditure excludes special forms of trading at 12.4% for the period 2012-2026 and includes the following growth rates: +2.1% between 2012-2013 and +3% between 2013-2026.

2010 PRICES

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 3: TOTAL EXPENDITURE WITHIN STUDY AREA BY GOODS CATEGORY AND ZONE, 2012-2026

A: CONVENIENCE GOODS

ZONE	2012	2017	2021	2026
1	29.9	32.0	33.7	36.0
2	16.3	17.3	18.1	19.2
3	35.3	36.9	38.6	40.9
4	28.9	30.6	32.2	34.1
5	36.7	39.7	42.3	45.8
6	20.8	22.4	23.9	25.7
7	40.1	43.2	45.9	49.4
TOTAL	**208.0**	**222.0**	**234.7**	**251.2**

B: CLOTHES & FOOTWEAR GOODS EXPENDITURE

ZONE	2012	2017	2021	2026
1	9.3	11.1	12.9	15.5
2	5.1	6.1	7.0	8.4
3	10.8	12.7	14.6	17.4
4	9.0	10.6	12.3	14.7
5	11.8	14.4	16.8	20.5
6	6.3	7.6	8.9	10.8
7	13.2	16.0	18.7	22.6
TOTAL	**65.6**	**78.5**	**91.3**	**110.0**

C: FURNITURE, FLOORCOVERING & TEXTILE GOODS

ZONE	2012	2017	2021	2026
1	4.5	5.4	6.3	7.6
2	2.5	2.9	3.4	4.0
3	5.1	6.0	6.9	8.2
4	4.4	5.2	6.1	7.2
5	5.1	6.1	7.2	8.8
6	3.4	4.1	4.8	5.8
7	6.4	7.8	9.1	11.0
TOTAL	**31.4**	**37.6**	**43.7**	**52.7**

D: DIY & DECORATING GOODS

ZONE	2012	2017	2021	2026
1	5.4	6.5	7.6	9.1
2	2.7	3.3	3.8	4.5
3	6.2	7.2	8.3	9.9
4	5.2	6.2	7.1	8.5
5	5.8	7.0	8.2	10.0
6	3.9	4.7	5.5	6.7
7	6.9	8.3	9.7	11.7
TOTAL	**36.0**	**43.1**	**50.1**	**60.3**

Notes:

Total expenditure for individual goods categories calculated by multiplying resident population by per capita expenditure.

2010 PRICES

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 3 (Continued): TOTAL EXPENDITURE WITHIN STUDY AREA BY GOODS CATEGORY AND ZONE, 2012-2026

E: DOMESTIC APPLIANCES

ZONE	2012	2017	2021	2026
1	1.9	2.3	2.7	3.2
2	1.2	1.5	1.7	2.0
3	2.2	2.6	3.0	3.6
4	1.8	2.1	2.5	2.9
5	2.8	3.4	3.9	4.8
6	1.5	1.8	2.2	2.6
7	2.8	3.4	4.0	4.9
TOTAL	**14.3**	**17.2**	**20.0**	**24.1**

F: TV, HI-FI, RADIO, PHOTOGRAPHIC & COMPUTER GOODS

ZONE	2012	2017	2021	2026
1	5.6	6.7	7.8	9.4
2	3.1	3.7	4.2	5.1
3	6.6	7.8	9.0	10.7
4	5.4	6.5	7.5	8.9
5	7.2	8.7	10.2	12.4
6	4.2	5.0	5.9	7.1
7	8.5	10.2	11.9	14.5
TOTAL	**40.6**	**48.6**	**56.5**	**68.1**

G: PERSONAL & LUXURY GOODS

ZONE	2012	2017	2021	2026
1	7.7	9.2	10.7	12.8
2	4.7	5.6	6.4	7.7
3	8.6	10.0	11.5	13.7
4	7.4	8.7	10.1	12.0
5	10.1	12.3	14.4	17.5
6	6.1	7.3	8.6	10.4
7	11.7	14.1	16.5	20.0
TOTAL	**56.2**	**67.3**	**78.2**	**94.2**

H: RECREATIONAL GOODS

ZONE	2012	2017	2021	2026
1	8.8	10.5	12.2	14.6
2	4.3	5.1	5.9	7.1
3	9.6	11.3	13.0	15.4
4	8.3	9.9	11.4	13.6
5	9.3	11.3	13.3	16.2
6	5.9	7.2	8.4	10.2
7	11.5	13.9	16.2	19.6
TOTAL	**57.8**	**69.1**	**80.3**	**96.7**

Notes:

Total expenditure for individual goods categories calculated by multiplying resident population by per capita expenditure.

2003 PRICES

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 4: MARKET SHARE OF CONVENIENCE FACILITIES IN MID DEVON

STORE / CENTRE	MAIN FOOD MARKET SHARE, BY ZONE							TOP-UP FOOD MARKET SHARE, BY ZONE						
	1	2	3	4	5	6	7	1	2	3	4	5	6	7
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
TIVERTON														
Town Centre														
Marks & Spencer Simply Food	0.0%	0.0%	1.1%	0.0%	5.1%	0.0%	0.0%	0.0%	0.0%	2.4%	0.0%	4.3%	1.2%	0.0%
Co-op, Market Walk	0.0%	0.0%	0.0%	1.0%	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.3%	0.0%	0.0%
Other	0.0%	0.0%	0.0%	3.0%	3.1%	1.0%	1.0%	0.0%	0.0%	2.4%	4.9%	29.8%	0.0%	2.2%
Sub-Total	0.0%	0.0%	1.1%	4.0%	12.2%	1.0%	1.0%	0.0%	0.0%	4.8%	4.9%	39.4%	1.2%	2.2%
Tesco	0.0%	1.0%	4.3%	17.0%	31.6%	6.2%	9.3%	0.0%	0.0%	1.2%	4.9%	21.3%	1.2%	3.4%
Tesco Express	0.0%	0.0%	1.1%	2.0%	2.0%	2.1%	0.0%	0.0%	0.0%	0.0%	1.2%	8.5%	0.0%	0.0%
Morrisons	1.1%	3.0%	22.3%	31.0%	48.0%	11.3%	14.4%	0.0%	2.2%	8.3%	8.6%	20.2%	3.5%	1.1%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%
Tiverton Sub-Total	1.1%	4.0%	28.7%	54.0%	93.9%	20.6%	24.7%	0.0%	2.2%	14.3%	19.8%	91.5%	5.8%	6.7%
CULLOMPTON														
Town Centre														
Town Centre														
Co-op	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	6.7%
Local stores, Cullompton	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	12.4%
Sub-Total	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	4.1%	0.0%	0.0%	0.0%	0.0%	1.1%	2.3%	19.1%
Tesco	0.0%	0.0%	0.0%	2.0%	0.0%	7.2%	49.5%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	33.7%
Mole Valley Farmers, Honiton Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
Cullompton Sub-Total	0.0%	0.0%	0.0%	2.0%	0.0%	8.2%	53.6%	0.0%	0.0%	0.0%	0.0%	1.1%	4.7%	53.9%
CREDITON														
Town Centre														
Tesco Express	1.1%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	11.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Local stores, Crediton	1.1%	6.0%	2.1%	0.0%	0.0%	0.0%	0.0%	6.7%	34.8%	2.4%	0.0%	0.0%	2.3%	1.1%
Sub-Total	2.1%	10.0%	2.1%	0.0%	0.0%	0.0%	0.0%	7.9%	46.1%	2.4%	0.0%	0.0%	2.3%	1.1%
Tesco	32.6%	43.0%	12.8%	0.0%	0.0%	10.3%	0.0%	4.5%	21.3%	6.0%	0.0%	0.0%	1.2%	0.0%
Morrisons	14.7%	36.0%	6.4%	0.0%	0.0%	2.1%	0.0%	6.7%	25.8%	2.4%	0.0%	0.0%	3.5%	0.0%
Crediton Sub-Total	49.5%	89.0%	21.3%	0.0%	0.0%	12.4%	0.0%	19.1%	93.3%	10.7%	0.0%	0.0%	7.0%	1.1%
BAMPTON														
Costcutter, Brook Street, Bampton	0.0%	0.0%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%
Local stores, Bampton	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	22.2%	1.1%	0.0%	0.0%
VILLAGES	0.0%	0.0%	1.1%	0.0%	1.0%	6.2%	1.0%	31.5%	1.1%	13.1%	11.1%	3.2%	38.4%	29.2%
Stores outside of Mid Devon District	49.5%	7.0%	48.9%	39.0%	5.1%	52.6%	20.6%	49.4%	3.4%	61.9%	45.7%	3.2%	44.2%	9.0%
TOTAL	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

Notes:

Market shares taken from 2012 Mid Devon Household Survey.

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 5: TURNOVER OF CONVENIENCE FACILITIES IN MID DEVON

STORE / CENTRE	MAIN FOOD MARKET SHARE, BY ZONE							TOP-UP FOOD MARKET SHARE, BY ZONE							TOTAL
	1	2	3	4	5	6	7	1	2	3	4	5	6	7	
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
TIVERTON															
Town Centre															
Marks & Spencer Simply Food	£0.0	£0.0	£0.3	£0.0	£1.3	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.5	£0.1	£0.0	2.4
Co-op, Market Walk	£0.0	£0.0	£0.0	£0.2	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	1.8
Other	£0.0	£0.0	£0.0	£0.6	£0.8	£0.2	£0.3	£0.0	£0.0	£0.3	£0.4	£3.3	£0.0	£0.3	6.1
Sub-Total	£0.0	£0.0	£0.3	£0.8	£3.1	£0.2	£0.3	£0.0	£0.0	£0.5	£0.4	£4.3	£0.1	£0.3	10.3
Tesco	£0.0	£0.1	£1.1	£3.4	£8.1	£0.9	£2.6	£0.0	£0.0	£0.1	£0.4	£2.3	£0.1	£0.4	19.6
Tesco Express	£0.0	£0.0	£0.3	£0.4	£0.5	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£0.9	£0.0	£0.0	2.5
Morrisons	£0.2	£0.3	£5.5	£6.3	£12.3	£1.7	£4.1	£0.0	£0.1	£0.9	£0.7	£2.2	£0.2	£0.1	34.7
Other	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	0.2
Tiverton Sub-Total	£0.2	£0.5	£7.1	£10.9	£24.1	£3.0	£6.9	£0.0	£0.1	£1.5	£1.7	£10.1	£0.4	£0.8	67.3
CULLOMPTON															
Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	0.0
Town Centre	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	0.0
Co-op	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.8	1.2
Local stores, Cullompton	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£1.5	2.7
Sub-Total	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£1.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£2.3	3.9
Tesco	£0.0	£0.0	£0.0	£0.4	£0.0	£1.1	£13.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£4.1	19.6
Mole Valley Farmers, Honiton Road	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	0.1
Cullompton Sub-Total	£0.0	£0.0	£0.0	£0.4	£0.0	£1.2	£15.1	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£6.5	23.6
CREDITON															
Town Centre															
Tesco Express	£0.2	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	1.3
Local stores, Crediton	£0.2	£0.7	£0.5	£0.0	£0.0	£0.0	£0.0	£0.6	£1.7	£0.3	£0.0	£0.0	£0.1	£0.1	4.3
Sub-Total	£0.4	£1.1	£0.5	£0.0	£0.0	£0.0	£0.0	£0.7	£2.3	£0.3	£0.0	£0.0	£0.1	£0.1	5.6
Tesco	£6.8	£4.9	£3.2	£0.0	£0.0	£1.5	£0.0	£0.4	£1.0	£0.6	£0.0	£0.0	£0.1	£0.0	18.5
Morrisons	£3.1	£4.1	£1.6	£0.0	£0.0	£0.3	£0.0	£0.6	£1.3	£0.3	£0.0	£0.0	£0.2	£0.0	11.4
Crediton Sub-Total	£10.4	£10.2	£5.3	£0.0	£0.0	£1.8	£0.0	£1.7	£4.6	£1.1	£0.0	£0.0	£0.4	£0.1	35.5
BAMPTON															
Costcutter, Brook Street, Bampton	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	0.5
Local stores, Bampton	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£0.1	£0.0	£0.0	2.7
VILLAGES	£0.0	£0.0	£0.3	£0.0	£0.3	£0.9	£0.3	£2.8	£0.1	£1.4	£1.0	£0.4	£2.4	£3.5	13.2
Stores outside of Mid Devon District	£10.4	£0.8	£12.1	£7.9	£1.3	£7.7	£5.8	£4.4	£0.2	£6.5	£4.0	£0.4	£2.8	£1.1	65.2
TOTAL	**£20.9**	**£11.4**	**£24.7**	**£20.2**	**£25.7**	**£14.6**	**£28.1**	**£9.0**	**£4.9**	**£10.6**	**£8.7**	**£11.0**	**£6.2**	**£12.0**	**208.0**

Notes:

Study area derived turnover levels calculated by applying market share data in Table 4 to available convenience goods expenditure within Table 3.

2010 PRICES

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 6: MARKET SHARE & TURNOVER OF CLOTHES AND FOOTWEAR GOODS FACILITIES

CENTRE	MARKET SHARE (%)								TURNOVER (£m)							TURNOVER (£m)
	1	2	3	4	5	6	7		1	2	3	4	5	6	7	
Tiverton	1.2	2.1	7.3	25.6	41.8	7.8	14.6		0.1	0.1	0.8	2.3	4.9	0.5	1.9	10.7
Cullompton	0.0	0.0	0.0	1.1	0.0	1.1	0.0		0.0	0.0	0.0	0.1	0.0	0.1	0.0	0.2
Crediton	7.0	10.3	1.2	0.0	0.0	0.0	0.0		0.6	0.5	0.1	0.0	0.0	0.0	0.0	1.3
Rural Area																
Bampton	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Stores Outside Mid Devon District	91.8	87.6	91.5	73.3	58.2	91.1	85.4		8.5	4.5	9.9	6.6	6.9	5.8	11.3	53.4
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**9.3**	**5.1**	**10.8**	**9.0**	**11.8**	**6.3**	**13.2**	**65.6**

Notes:

Market shares taken from 2012 Mid Devon Household Survey, excluding catalogue, internet, mail order and 'don't do' responses.

Turnover calculated by applying market share to available expenditure within each zone.

2010 PRICES

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 7: MARKET SHARE & TURNOVER OF FURNITURE, FLOORCOVERINGS AND TEXTILE GOODS FACILITIES

CENTRE	MARKET SHARE (%)								TURNOVER (£m)							TURNOVER (£m)
	1	2	3	4	5	6	7		1	2	3	4	5	6	7	
Tiverton	1.3	2.4	14.3	33.2	49.9	7.8	22.6		0.1	0.1	0.7	1.5	2.5	0.3	1.5	6.6
Cullompton	0.0	0.0	0.0	0.0	0.0	2.6	7.6		0.0	0.0	0.0	0.0	0.0	0.1	0.5	0.6
Crediton	8.8	18.8	1.3	0.0	0.0	1.3	0.0		0.4	0.5	0.1	0.0	0.0	0.0	0.0	1.0
Rural Area																
Bampton	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Stores Outside Mid Devon District	89.9	78.8	84.4	66.8	50.1	88.3	69.8		4.1	1.9	4.3	3.0	2.5	3.0	4.5	23.3
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**4.5**	**2.5**	**5.1**	**4.4**	**5.1**	**3.4**	**6.4**	**31.4**

Notes:

Market shares taken from 2012 Mid Devon Household Survey, excluding catalogue, internet, mail order and 'don't do' responses.

Turnover calculated by applying market share to available expenditure within each zone.

2010 PRICES

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 8: MARKET SHARE & TURNOVER OF DIY GOODS FACILITIES

CENTRE	MARKET SHARE (%)								TURNOVER (£m)							TURNOVER (£m)
	1	2	3	4	5	6	7		1	2	3	4	5	6	7	
Tiverton	0.0	3.2	21.8	51.5	81.0	11.7	41.3		0.0	0.1	1.3	2.7	4.7	0.5	2.8	12.1
Cullompton	0.0	0.0	0.0	0.0	0.0	2.1	8.7		0.0	0.0	0.0	0.0	0.0	0.1	0.6	0.7
Crediton	23.6	47.4	10.3	0.0	1.1	3.2	0.0		1.3	1.3	0.6	0.0	0.1	0.1	0.0	3.4
Rural Area																
Bampton	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Stores Outside Mid Devon District	76.4	49.4	67.9	48.5	17.9	83.0	50.0		4.2	1.4	4.2	2.5	1.0	3.2	3.4	19.9
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**5.4**	**2.7**	**6.2**	**5.2**	**5.8**	**3.9**	**6.9**	**36.0**

Notes:

Market shares taken from 2012 Mid Devon Household Survey, excluding catalogue, internet, mail order and 'don't do' responses.

Turnover calculated by applying market share to available expenditure within each zone.

2010 PRICES

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 9: MARKET SHARE & TURNOVER OF DOMESTIC APPLIANCE GOODS FACILITIES

CENTRE	MARKET SHARE (%)								TURNOVER (£m)							TURNOVER (£m)
	1	2	3	4	5	6	7		1	2	3	4	5	6	7	
Tiverton	0.0	0.0	6.1	23.8	51.3	6.6	17.1		0.0	0.0	0.1	0.4	1.4	0.1	0.5	2.6
Cullompton	0.0	0.0	0.0	2.3	0.0	2.6	11.4		0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.4
Crediton	22.0	56.6	20.9	1.1	0.0	5.2	0.0		0.4	0.7	0.5	0.0	0.0	0.1	0.0	1.7
Rural Area																
Bampton	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Stores Outside Mid Devon District	78	43	73	73	49	86	72		1.5	0.5	1.6	1.3	1.3	1.3	2.0	9.7
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**1.9**	**1.2**	**2.2**	**1.8**	**2.8**	**1.5**	**2.8**	**14.3**

Notes:

Market shares taken from 2012 Mid Devon Household Survey, excluding catalogue, internet, mail order and 'don't do' responses.

Turnover calculated by applying market share to available expenditure within each zone.

2010 PRICES

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 10: MARKET SHARE & TURNOVER OF TV, HI-FI, RADIO, PHOTOGRAPHIC & COMPUTER GOODS FACILITIES

CENTRE	MARKET SHARE (%)								TURNOVER (£m)							TURNOVER (£m)
	1	2	3	4	5	6	7		1	2	3	4	5	6	7	
Tiverton	0.0	1.1	7.7	16.0	39.3	1.4	12.7		0.0	0.0	0.5	0.9	2.8	0.1	1.1	5.4
Cullompton	0.0	0.0	0.0	0.0	0.0	0.0	2.8		0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.2
Crediton	9.3	18.2	6.4	0.0	0.0	4.2	0.0		0.5	0.6	0.4	0.0	0.0	0.2	0.0	1.7
Rural Area																
Bampton	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Stores Outside Mid Devon District	90.7	80.7	85.9	84.0	60.7	94.4	84.5		5.1	2.5	5.7	4.6	4.4	3.9	7.2	33.3
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**5.6**	**3.1**	**6.6**	**5.4**	**7.2**	**4.2**	**8.5**	**40.6**

Notes:

Market shares taken from 2012 Mid Devon Household Survey, excluding catalogue, internet, mail order and 'don't do' responses.

Turnover calculated by applying market share to available expenditure within each zone.

2010 PRICES

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 11: MARKET SHARE & TURNOVER OF PERSONAL AND LUXURY GOODS FACILITIES

CENTRE	MARKET SHARE (%)								TURNOVER (£m)							TURNOVER
	1	2	3	4	5	6	7		1	2	3	4	5	6	7	(£m)
Tiverton	1.2	1.1	9.2	37.7	66.7	13.1	22.9		0.1	0.1	0.8	2.8	6.7	0.8	2.7	13.9
Cullompton	0.0	0.0	0.0	0.0	0.0	2.4	12.0		0.0	0.0	0.0	0.0	0.0	0.1	1.4	1.5
Crediton	18.3	48.3	11.8	0.0	0.0	1.2	0.0		1.4	2.3	1.0	0.0	0.0	0.1	0.0	4.8
Rural Area																
Bampton	0.0	0.0	0.0	2.4	0.0	0.0	0.0		0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.2
Stores Outside Mid Devon District	80.5	50.6	79.0	59.9	33.3	83.3	65.1		6.2	2.4	6.8	4.4	3.4	5.0	7.6	35.8
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**7.7**	**4.7**	**8.6**	**7.4**	**10.1**	**6.1**	**11.7**	**56.2**

Notes:

Market shares taken from 2012 Mid Devon Household Survey, excluding catalogue, internet, mail order and 'don't do' responses.

Turnover calculated by applying market share to available expenditure within each zone.

2010 PRICES

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 12: MARKET SHARE & TURNOVER OF RECREATIONAL GOODS FACILITIES

CENTRE	MARKET SHARE (%)								TURNOVER (£m)							TURNOVER (£m)
	1	2	3	4	5	6	7		1	2	3	4	5	6	7	
Tiverton	1.7	1.4	12.5	22.2	49.2	3.3	50.9		0.1	0.1	1.2	1.8	4.6	0.2	5.9	13.9
Cullompton	0.0	0.0	0.0	0.0	0.0	0.0	10.9		0.0	0.0	0.0	0.0	0.0	0.0	1.3	1.3
Crediton	13.4	31.1	10.4	0.0	0.0	6.6	0.0		1.2	1.3	1.0	0.0	0.0	0.4	0.0	3.9
Rural Area																
Bampton	0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Stores Outside Mid Devon District	84.9	67.5	77.1	77.8	50.8	90.1	38.2		7.4	2.9	7.4	6.5	4.7	5.4	4.4	38.7
TOTAL	**100**	**100**	**100**	**100**	**100**	**100**	**100**		**8.8**	**4.3**	**9.6**	**8.3**	**9.3**	**5.9**	**11.5**	**57.8**

Notes:

Market shares taken from 2012 Mid Devon Household Survey, excluding catalogue, internet, mail order and 'don't do' responses.

Turnover calculated by applying market share to available expenditure within each zone.

2010 PRICES

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 13: TOTAL COMPARISON TURNOVER OF FACILITIES WITHIN MID DEVON, 2012

CENTRE	ZONE							TURNOVER (£m)	STUDY AREA MARKET SHARE (%)
	1	2	3	4	5	6	7		
Tiverton	0.4	0.4	5.5	12.4	27.7	2.4	16.3	65.1	21.5%
Cullompton	0.0	0.0	0.0	0.1	0.0	0.4	4.3	4.9	1.6%
Crediton	5.9	7.2	3.7	0.0	0.1	0.9	0.0	17.7	5.9%
Bampton	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.2	0.1%
TOTAL								**87.8**	**100**

Notes:

Turnovers, by zone, for comparison facilities within and outside Mid Devon taken from Tables 6-12.

2010 PRICES

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 14: CONVENIENCE FLOORSPACE WITHIN MID DEVON DISTRICT

STORE / CENTRE	FLOORSPACE (sq m net)		COMPANY AVERAGE SALES DENSITY (£/sq m)	TOTAL CONVENIENCE GOODS TURNOVER (£m)
	Total Net Sales	Convenience Goods Sales		
Tiverton				
Town Centre				
Marks & Spencer Simply Food	730	694	10833	7.5
Co-op	557	529	7530	4.0
Other Stores in Town Centre	1071	1071	5000	5.4
Out-of-Centre				
Tesco, Blundell's Road		2345	12842	30.1
Morrisons, Kennedy Way	2230	1895	11988	22.7
Other convenience goods floorspace	650	650	4500	2.9
Cullompton				
Town Centre	450	450	5000	2.3
Out-of-Centre				
Tesco	2016	1613	12842	20.7
Crediton				
Town Centre				
Tesco Express	185	176	12842	2.3
Other Stores in Town Centre	631	631	5000	3.2
Out-of-Centre				
Morrisons, Mill Street	1338	1204	11988	14.4
Tesco	3587	2500	12842	32.1
Bampton	390	390	5000	2.0
TOTAL				**149.5**

Notes:

Floorspace figures for existing stores taken from IGD, Experian Goad, MDDC and GVA Grimley data.

Company average sales densities taken from data supplied by Verdict.

Sales densities for other convenience stores based upon likely trading performance of these facilities.

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TABLE 15: CONVENIENCE GOODS CAPACITY - TIVERTON, 2012-2026

	2012	2017	2021	2026
Available Convenience Goods Expenditure (£m)	208.0	222.0	234.7	251.2
Turnover from Study Area (£m)	67.3	71.9	75.9	81.3
Market Share (%)	32.4	32.4	32.4	32.4
Expenditure Inflow (£m)	1.3	1.4	1.5	1.6
Total Turnover Potential (£m)	68.7	73.3	77.5	82.9
Baseline Turnover of Existing Facilities (£m)	72.6	74.1	74.7	75.4
Residual Expenditure (£m)	**-4.0**	**-0.8**	**2.8**	**7.5**
Indicative Sales Density of New Convenience Floorspace (£/sq m)	12500	12752	12854	12983
Indicative Floorspace Capacity (sq m net)	**-317**	**-61**	**218**	**577**

Notes:

Available convenience goods expenditure taken from Table 3.

Turnover from study area taken from Table 5.

Market share at 2012 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2012-2026 is assumed to remain constant.

Expenditure inflow assumed to be 2% of turnover from study area.

Total turnover potential is the turnover from study area plus the expenditure inflow.

Baseline turnover from existing facilities taken from Table 14.

Baseline turnover of existing facilities and turnover of commitments assumed to experience a 0.4% increase in floorspace efficiency between 2012-17 and 0.2% pa between 2017-2026.

Residual expenditure is the total turnover potential minus the turnover of existing facilities and commitments.

Floorspace capacity based on an indicative estimate only of new convenience goods floorspace.

2010 PRICES

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 16: CONVENIENCE GOODS CAPACITY - CREDITON, 2012-2026

	2012	2017	2021	2026
Available Convenience Goods Expenditure (£m)	208.0	222.0	234.7	251.2
Turnover from Study Area (£m)	35.5	37.9	40.1	42.9
Market Share (%)	17.1	17.1	17.1	17.1
Expenditure Inflow (£m)	0.7	0.8	0.8	0.9
Total Turnover Potential (£m)	36.3	38.7	40.9	43.8
Baseline Turnover of Existing Facilities (£m)	51.9	53.0	53.4	54.0
Residual Expenditure (£m)	**-15.7**	**-14.3**	**-12.5**	**-10.2**
Indicative Sales Density of New Convenience Floorspace (£/sq m)	12500	12752	12854	12983
Indicative Floorspace Capacity (sq m net)	**-1256**	**-1121**	**-974**	**-784**

Notes:

Available convenience goods expenditure taken from Table 3.

Turnover from study area taken from Table 5.

Market share at 2012 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2012-2026 is assumed to remain constant.

Expenditure inflow assumed to be 5% of turnover from study area.

Total turnover potential is the turnover from study area plus the expenditure inflow.

Baseline turnover from existing facilities taken from Table 14.

Baseline turnover of existing facilities and turnover of commitments assumed to experience a 0.4% increase in floorspace efficiency between 2012-17 and 0.2% pa between 2017-2026.

Residual expenditure is the total turnover potential minus the turnover of existing facilities and commitments.

Floorspace capacity based on an indicative estimate only of new convenience goods floorspace.

2010 PRICES

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 17: CONVENIENCE GOODS CAPACITY - CULLOMPTON, 2012-2026

	2012	2017	2021	2026
Available Convenience Goods Expenditure (£m)	208.0	222.0	234.7	251.2
Turnover from Study Area (£m)	23.6	25.2	26.6	28.5
Market Share (%)	11.3	11.3	11.3	11.3
Expenditure Inflow (£m)	0.5	0.5	0.5	0.6
Total Turnover Potential (£m)	24.0	25.7	27.1	29.0
Baseline Turnover of Existing Facilities (£m)	23.0	23.4	23.6	23.8
Residual Expenditure (£m)	**1.1**	**2.2**	**3.5**	**5.2**
Indicative Sales Density of New Convenience Floorspace (£/sq m)	12500	12752	12854	12983
Indicative Floorspace Capacity (sq m net)	**86**	**175**	**273**	**399**

Notes:

Available convenience goods expenditure taken from Table 3.

Turnover from study area taken from Table 5.

Market share at 2012 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2012-2026 is assumed to remain constant.

Expenditure inflow assumed to be 5% of turnover from study area.

Total turnover potential is the turnover from study area plus the expenditure inflow.

Baseline turnover from existing facilities taken from Table 14. Assumed that former Somerfield/Co-op will not be re-occupied for convenience retail use.

Baseline turnover of existing facilities and turnover of commitments assumed to experience a 0.4% increase in floorspace efficiency between 2012-17 and 0.2% pa between 2017-2026.

Residual expenditure is the total turnover potential minus the turnover of existing facilities and commitments.

Floorspace capacity based on an indicative estimate only of new convenience goods floorspace.

2010 PRICES

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 18: COMPARISON GOODS CAPACITY - TIVERTON, 2012-2026

	2012	2017	2021	2026
Available Convenience Goods Expenditure (£m)	302.0	361.4	420.2	506.1
Turnover from Study Area (£m)	65.1	77.9	90.5	109.0
Market Share (%)	21.5	21.5	21.5	21.5
Expenditure Inflow (£m)	1.3	1.6	1.8	2.2
Total Turnover Potential (£m)	66.4	79.4	92.3	111.2
Baseline Turnover of Existing Facilities (£m)	60.3	65.6	70.2	76.4
Commitments (£m)	1.3	1.4	1.5	1.7
Residual Expenditure (£m)	**4.7**	**12.4**	**20.6**	**33.2**
Indicative Sales Density of New Convenience Floorspace (£/sq m)	5000	5101	5142	5193
Indicative Floorspace Capacity (sq m net)	**948**	**2428**	**4013**	**6392**

Notes:

Available comparison goods expenditure taken from Table 3.

Turnover from study area taken from Table 13.

Market share at 2012 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2012-2026 is assumed to remain constant.

Expenditure inflow assumed to be 2% of turnover from study area.

Total turnover potential is the turnover from study area plus the expenditure inflow.

Baseline turnover based on 2004 study data, updated to 2012 levels and taking into account new comparison goods floorspace.

Baseline turnover of existing facilities and turnover of commitments assumed to experience a 1.7% increase in floorspace efficiency between 2012-26.

Residual expenditure is the total turnover potential minus the turnover of existing facilities.

Floorspace capacity based on an indicative estimate only of new comparison goods floorspace.

2010 PRICES

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MID DEVON RETAIL STUDY 2012

TABLE 19: COMPARISON GOODS CAPACITY - CREDITON, 2012-2026

	2012	2017	2021	2026
Available Convenience Goods Expenditure (£m)	302.0	361.4	420.2	506.1
Turnover from Study Area (£m)	17.7	21.2	24.7	29.7
Market Share (%)	5.9	5.9	5.9	5.9
Expenditure Inflow (£m)	0.4	0.4	0.5	0.6
Total Turnover Potential (£m)	18.1	21.7	25.2	30.3
Baseline Turnover of Existing Facilities (£m)	22.8	24.8	26.5	28.9
Residual Expenditure (£m)	**-4.7**	**-3.1**	**-1.4**	**1.5**
Indicative Sales Density of New Convenience Floorspace (£/sq m)	5000	5101	5142	5193
Indicative Floorspace Capacity (sq m net)	**-941**	**-618**	**-264**	**280**

Notes:

Available comparison goods expenditure taken from Table 3.

Turnover from study area taken from Table 13.

Market share at 2012 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2012-2026 is assumed to remain constant.

Expenditure inflow assumed to be 2% of turnover from study area.

Total turnover potential is the turnover from study area plus the expenditure inflow.

Baseline turnover based on 2004 study data, updated to 2012 levels and taking into account new comparison goods floorspace.

Baseline turnover of existing facilities and turnover of commitments assumed to experience a 1.7% increase in floorspace efficiency between 2012-26.

Residual expenditure is the total turnover potential minus the turnover of existing facilities.

Floorspace capacity based on an indicative estimate only of new comparison goods floorspace.

2010 PRICES

MID DEVON DISTRICT COUNCIL
MID DEVON RETAIL STUDY 2012

TABLE 20: COMPARISON GOODS CAPACITY - CULLOMPTON, 2012-2026

	2012	2017	2021	2026
Available Convenience Goods Expenditure (£m)	302.0	361.4	420.2	506.1
Turnover from Study Area (£m)	4.9	5.8	6.8	8.2
Market Share (%)	1.6	1.6	1.6	1.6
Expenditure Inflow (£m)	0.1	0.1	0.1	0.2
Total Turnover Potential (£m)	5.0	5.9	6.9	8.3
Baseline Turnover of Existing Facilities (£m)	7.4	8.0	8.6	9.3
Residual Expenditure (£m)	**-2.4**	**-2.1**	**-1.7**	**-1.0**
Indicative Sales Density of New Convenience Floorspace (£/sq m)	5000	5101	5142	5193
Indicative Floorspace Capacity (sq m net)	**-480**	**-406**	**-323**	**-193**

Notes:

Available comparison goods expenditure taken from Table 3.

Turnover from study area taken from Table 13.

Market share at 2012 is the turnover from study area expressed as a percentage of available expenditure. Market share for 2012-2026 is assumed to remain constant.

Expenditure inflow assumed to be 2% of turnover from study area.

Total turnover potential is the turnover from study area plus the expenditure inflow.

Baseline turnover based on 2004 study data, updated to 2012 levels and taking into account new comparison goods floorspace.

Baseline turnover of existing facilities and turnover of commitments assumed to experience a 1.7% increase in floorspace efficiency between 2012-26.

Residual expenditure is the total turnover potential minus the turnover of existing facilities.

Floorspace capacity based on an indicative estimate only of new comparison goods floorspace.

2010 PRICES