

**AVISON
YOUNG**

Torbay Council

Torbay Retail Study 2022

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1. Introduction

- 1.1 This Retail Study report (hereafter referred to as 'the Study') has been prepared by Avison Young ('AY') for Torbay Council ('TC') in order to provide up to date evidence on retail land use and town centre health issues for an update to the Torbay Local Plan.
- 1.2 Preparation of the Local Plan Update in Torbay commenced in 2021 and is focused around a series of core topic areas. In particular, TC reviewed the current Local Plan (adopted in 2015) in December 2020 and identified a need to update housing policies¹. Linked to this is a need to understand how town centres are functioning and whether there is scope to relax town centre boundaries or boost town centre regeneration in other ways.
- 1.3 The Council seeks to understand the impact of recent changes, particularly the introduction of a wide Class E for town centre uses. TC has also received a steady stream of retail applications in recent years, with more sites being promoted to the Local Plan, and it is therefore necessary to obtain an updated assessment of retail needs, trading performance and town centre health.
- 1.4 Following initial stages of consultation in 2020 and 2021, proposed site options and strategic housing policies are due to be consulted upon later in 2022. A consultation on other policies, including retail and town centres will take place in early 2023. A 'preferred options' version of the Plan is scheduled for in mid 2023, and Submission to the Secretary of State for Examination is due in Autumn 2023.
- 1.5 In relation to retail and town centre issues, the latest (July 2021) version of the National Planning Policy Framework ('NPPF') indicates that development plan policies should:

"a) define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;

b) define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;

c) retain and enhance existing markets and, where appropriate, re-introduce or create new ones;

d) allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;

e) where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and

f) recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites".

¹ [\(Public Pack\)Item 8 Local Plan Review \(Local Development Scheme\) - Local Plan Working Party Recommendations Agenda Supplement for Cabinet, 17/11/2020 17:30 \(torbay.gov.uk\)](#)

- 1.6 The agreed brief for this Study requires the following information and assessments to be provided:
- an analysis of recent/current retail trends, including changes in expected retail expenditure and the on-going effects of on-line retailing / the impact of COVID-19 on shopping and leisure patterns.
 - an assessment of current shopping patterns for food and non-food goods, along with the usage of food and beverage facilities, plus the three main town centres in Torbay.
 - in order to inform future policy-making, the provision of focused health check reviews of the three main town centres in Torbay, along with the three district centres in Torquay and Paignton.
 - an assessment of the ‘need’ for food and non-food retail floorspace across the three main settlements in Torbay (along with the quantitative need for food and beverage floorspace provision).
 - advice on the content of retail and town centre planning policies, in relation to proposals within or outside of defined ‘town centres’, including the approach to the new Class E use category and the provision of new local / neighbourhood centres.
- 1.7 The government introduced a significant amendment of use classes in September 2020, with the introduction of a single Class E use class, encompassing most town centre and commercial uses. This has significant implications for planning for town centres, which are examined in more detail in this document. At the time of writing, it is too early to say what policies the current government will follow on town centres, and planning more widely. However, initial announcements point to significant deregulation in an attempt to boost economic growth.
- 1.8 In order to address the requirements of the agreed project brief, this Study provides a comprehensive review of the role and function of the main town and district centres across Torbay, along with a comprehensive review of current shopping patterns and trading performance of stores and centres over time. In order to inform this assessment, two main pieces of empirical research have been undertaken:
- Land use surveys of the main town and district centres. This has utilised raw land use data collected by TC in 2021, which has then been analysed by AY to provide a summary of the main retail land use categories in each of the main centres.
 - Shopping and leisure patterns. For the purposes of this Study, a new telephone survey of shopping and leisure patterns has been commissioned. The survey has been undertaken by NEMS Market Research in January/February 2022. The survey has obtained information on convenience and comparison goods shopping patterns along with leisure activities and the usage of the main town centres. Further details regarding the survey can be found in Section 4 of this document.
- 1.9 Throughout this Study references will be made to previous retail and town centres studies commissioned by TC across the Torbay area. These include:
- the Torbay Retail Study Update 2011; and
 - the Torbay Retail Study Update 2013².
- 1.10 From the outset of this Study, it should be noted that issues associated with town centre health and the usage of retail and leisure provision will have been influenced by the severe impact of the COVID-19 pandemic, and subsequent Global events on the UK economy (particularly in the latter part of 2022). This will need to be taken into account when reading and understanding the contents and recommendations of this Study.

² prior to the 2011 and 2013 retail studies, retail studies were also undertaken in 2006 and 2008

- 1.11 All of the evidence base data for this Study was collected after the ending of the latest set of lockdown measures, although the pandemic is likely to have long-lasting effects on the UK economy and this should be borne in mind when considering the evidence base data for this Study. The same is true of the current period of economic turbulence in the UK economy. Therefore, there will be a need to keep the body of evidence base data under review and consider whether any updates to the health checks, economic forecasts and shopping patterns data would be warranted as the new Local Plan moves towards Submission for Examination.
- 1.12 The remainder of this report is structured in the following manner:
- Section 2 provides a review of adopted and draft planning policy across Torbay along with a summary of current national planning policy relation to retail and main town centre uses.
 - In Section 3 we provide a review of salient retail and town centre trends.
 - Sections 4 provides our review of town centre health issues across the three town centres and the three district centres.
 - Section 5 provides our assessment of the quantitative and qualitative need for retail floorspace in Torquay, Paignton and Brixham.
 - Advice on development management policies is contained in Section 6.
 - Finally, a summary of the contents of this Study can be found in Section 7.
- 1.13 All plans, statistical information and other documentation referred to in the main text of this report can be found in appendices contained at the rear of this document.

2. Planning Policy Context

Introduction

- 2.1 Since the completion of the most recent retail study in Torbay, TC has (in 2015) adopted the Torbay Local Plan 2012-2030 and new versions of the National Planning Policy Framework ('NPPF') have been published. In addition, there have been a series of changes to the Use Classes Order and Permitted Development Rights which will affect retail and town centre planning issues.
- 2.2 Each of the salient changes in planning policy and legislation, insofar as they relate to retail and town centre planning policy, are summarised in turn below.

The Development Plan

- 2.3 The Torbay Local Plan 2012-2030 ('the Local Plan') was adopted in 2015 and comprises the main element of the current development plan for the local area. Section 6 of the Local Plan contains five policies which deal with retail and town centre issues:
- TC1. This policy outlines the Council's 'town centres first' approach to planning policy for retail and other key land uses and provides a strategic outline of the various measures which are intended to maintain and enhance the vitality and viability of the three main town centres.
 - TC2. Policy TC2 outlines the retail hierarchy in Torbay, across four separate tiers: town, district, local and neighbourhood centres³.
 - TC3. This policy deals with a varied approach to assessing retail development proposals in different types of location across Torbay, including: (A) town centres; (B) district, local and neighbourhood centres (apart from The Willows); (C) retail development proposals in The Willows district centre; (D) retail development proposals located outside of defined centres; and (E) corner shops, village shops and isolated shops. In line with previous versions of the development plan, it provides a bespoke approach to retail development proposals at The Willows district centre and also sets an impact assessment threshold of 500sq m gross for retail development proposals located outside of defined 'town centres' in the hierarchy.
 - TC4. Policy TC4 deals with change of use proposals in the defined 'town centres', outlines general criteria for all change of use proposals and also specific criteria for proposals within the defined primary and secondary frontages.
 - TC5. This policy deals with the evening and night-time economy, providing support for development that helps create a vibrant diverse evening and night-time economy, subject to compliance with a series of criteria.
- 2.4 In addition to the above general development management policies, the Local Plan contains individual policies for each of the three town centres (SDT2, SDP2 and SDB2). Each policy sets out a strategy for each individual town centre, identifying key redevelopment sites:
- Torquay town centre:
 - Lower Union Street area
 - Town Hall car park

³ including planned new centres such as White Rock, Great Parks and Edginswell

- Paignton town centre:
 - Crossways shopping centre
 - Victoria Square multi-storey car park
 - Corner of Hyde Road and Torbay Road
 - Paignton Harbour
 - Station Lane / Great Western car park
- Brixham town centre:
 - general policy promoting retail, residential and other main town centre uses, with the Middle Street car park specifically mentioned as a key opportunity⁴.

2.5 Within each of the main town and district centres, the Local Plan policies map defines a series of boundaries and frontages. These are described in Section 4 of this document, as a starting point for a further discussion over potential changes to these boundaries in Section 6.

The National Planning Policy Framework ('NPPF') (July 2021)

2.6 At the time of the 2013 study, the original 2012 version of the NPPF was the main source of national planning policy on retail and town centre planning matters. However, the NPPF has since been revised and updated in February 2019 and July 2021. Therefore, it is important to record the changes in national policy since the completion of previous evidence base documents in order that it can inform advice on local development plan retail and town centre planning policies for the new development plan in Torbay.

2.7 The changes between the 2012 and 2018/2019/2021 versions of the NPPF, insofar as they relate to retail and town centre issues, are as follows:

- Whilst the two main policy tests for proposals outside of town centres (and not in accordance with an up to date development plan) remain the sequential and impact tests, the updated versions of the NPPF have clarified the issue of 'availability' of alternative sites (in the sequential test) as being available within 'a reasonable period of time'. However, there is no definition (or guidance) as to what is 'a reasonable period of time' in the context of proposals for main town centre uses⁵.
- The revisions to the NPPF have deleted the formal requirement for local authorities to define primary and secondary retail frontages in development plan. The latest NPPF still requires local authorities to define town centre boundaries and primary shopping areas.
- Whilst the requirement to allocate sites to meet identified needs remains, the revised NPPF indicates that this should be at least ten years ahead, rather than the full plan period as previously advised.
- The revised NPPF does not now provide any guidance on how 'needs' should be assessed for main town centre uses (previously quantitative and qualitative indicators were cited).

2.8 Finally, the one notable amendment in the July 2021 version of the NPPF is the revision to national policy on Article 4 Directions. The existence of Article 4 Directions has been in place for some time and they are used to restrict permitted development rights in certain specific instances, across a range of land uses and for various different reasons. The revised version of paragraph 53 of the NPPF notes that:

⁴ The Middle Street car park has previously been promoted by Tesco for redevelopment to provide a new foodstore for Brixham town centre, along with other smaller-scale main town centre uses and replacement car parking provision. This scheme has now been abandoned.

⁵ therefore, it is up to the decision-maker decide what is appropriate in individual cases, based upon the relevant circumstances.

“The use of Article 4 directions to remove national permitted development rights should:

- *where they relate to change from non-residential use to residential use, be limited to situations where an Article 4 direction is necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability, but would be very unlikely to extend to the whole of a town centre)*
- *in other cases, be limited to situations where an Article 4 direction is necessary to protect local amenity or the well-being of the area (this could include the use of Article 4 directions to require planning permission for the demolition of local facilities)*
- *in all cases, be based on robust evidence, and apply to the smallest geographical area possible”.*

2.9 The updated policy does not loosen the tight controls over the imposition of Article 4 Directions, although given the changes to the use classes order and permitted development rights (see later in this section), the government has acknowledged that Directions may be appropriate in focused parts of certain town centres where the loss of certain main town centre / Class E uses would undermine town centre health.

National Planning Practice Guidance (‘NPPG’)

2.10 Following initial publication in 2014, the NPPG on town centre planning policy was updated in July 2019 and again in September 2020. The latest version sets out the recommended content of town centre strategies, the indicators which are useful for planning for town centres and high streets, the permitted development rights which are available in relation to main town centre uses and also how local authorities should approach the application of the sequential and impact tests in terms of both plan making and development management issues. It also deals with how local authorities should approach the issue of primary and secondary shopping frontages (in light of the changes to the NPPF).

Other Considerations (Legislative Changes) - Permitted Development and the Use Classes Order

2.11 In recent years, in response to the on-going challenges faced by town centres and high street retailers (and other commercial uses), national government has introduced more flexibility into the permitted development rights system. Permitted development has long been an element of the planning system in England although, over time, further flexibility has been introduced in order to allow for changes, in certain circumstances, between some main town centre land use classes.

2.12 Since the 2013 study there have been two major changes in the use classes order and permitted development right. First, in July 2020, the government introduced a significant change to the land use classes order. The changes came into effect on the 1st September 2020 and revoked Parts A and D of the existing use classes order, as well as former Class B1(a-c).

2.13 In relation to retail and main town centre uses, the changes were as follows:

- A new Class E was introduced which encompasses the former A1, A2, A3, B1a, B1b, B1c and part of the D2 use class (for gyms and indoor recreational facilities)⁶. Changing from one Class E use to another is not development, and therefore outside planning control.
- The former A4 and A5 uses have now become *sui generis* uses, along with part of the former Class D2 uses comprising cinemas, concert halls, bingo halls and dance halls. The remaining former Class D2 uses (community halls, swimming pools, skating rinks and outdoor sport and recreation uses) are now placed into Use Class F2. Class F2 can also contain a shop of not more than 280sq

⁶ Not involving vehicles or firearms

metres, mostly selling essential goods including food, where there is no other such facility within 1000m radius of the shop's location.

- The uses within the former Class D1 are split between the new Use Class E (health care uses, creches, day centres) and the new Use Class F1 (schools, museums, libraries, halls courts and places of worship).

2.14 Following the September 2020 use class order changes, the Government has now introduced permanent changes to permitted development rights (following a transitional period between September 2020 and July 2021), which focus upon changes to residential use, refinement of rights in relation to office to residential use, and the expansion of rights under the new class MA. These came into effect from 1st August 2021.

2.15 The key aspects of the August 2021 changes can be summarised as follows:

- Previous permitted development rights under classes O and M (office to residential and retail to residential) ended on 31st July 2021.
- The introduction of the new class MA (business and commercial to residential) and its expansion to include the whole of Use Class E (shops, offices, restaurants/cafes, health services, gyms, nurseries and leisure).
- Permitted development to change from Use Class E (commercial, business and service) to a use falling within Use Class C3 (dwellinghouses) will be subject, in certain circumstances, a number of prior approvals. There will also be limitations / exclusions, including the introduction of a size limit of 1,500sq m per building. Previously, in relation to the change from office to residential, there was no upper size limit.

2.16 The automatic exclusions to this new right include buildings on land covered by, or within the curtilage of, designations such as SSSIs, Listed Buildings, a scheduled monument, an AONB, or a World Heritage Site. It is notable that Conservation Areas are not included in these automatic exclusions.

2.17 In order to take advantage of this new right, a developer must apply to the local planning authority for a determination as to whether prior approval of the authority will be required in relation to one or more of the following factors:

- transport
- noise
- flooding
- contamination
- residential amenity

2.18 In the case of buildings located in Conservation Areas⁷ consideration to be given to the impact of the change of use on the character or sustainability of the Conservation Area.

2.19 It will also be noted that there has been a key change by the new Class MA: the removal of any consideration of the impact on the high street (for existing uses falling within the new Use Class E⁸). This has the potential to be very significant for town centre high streets.

2.20 To benefit from Class MA, the use of the building must have fallen within Class E or one or more of the uses that it replaced for at least two years continuously prior to the date the prior approval

⁷ involving the change of use of part or all of the ground floor of the building

⁸ up until 31st July 2021 the 'impact on the high street' was a test for prior approval for uses outside of Class E

application is made. However, there is some debate as to whether the building must have been in the same use or mix of uses for that two year period.

- 2.21 In addition, the building must have been vacant for a continuous period of at least 3 months immediately prior to the date of the application for prior approval. A prior approval application can be made to change the use of part of the building only. The vacancy test applies to the building, but as the definition of a building in the GPDO relates to part of a building this might mean the vacancy test is only required for the part of the building to be converted. However, there is nothing in the regulation to stop a landlord making the property purposely empty, and no requirement to demonstrate the property has been marketed to prospective tenants in its current use, leaving many to suspect it will not present a significant barrier to take-up of the new right.
- 2.22 The permitted development right under Class MA does not include any building operations (i.e. it does not include the external alterations allowance that was afforded by Class M). This means that a building must be both standards compliant from the outset but also capable of being converted in its current form. It is therefore considered by some that planning permission will be required in the majority of cases for external alterations to the building, including new doors and windows and other external details.
- 2.23 It should be noted that these changes have attracted some controversy in some parts of the property and built environment sectors, with a key focus being on their effect on the future of town centres. Whilst limitations and conditions remain in place, there is a general sense of concern in some quarters that some high streets could potentially suffer and this may have prompted the inclusion of specific reference to town centres in Article 4 Direction policy in the July 2021 version of the NPPF.

3. Retail Expenditure Trends

- 3.1 In order to provide a robust evidence base library on retail and town centre issues for this Study it is important, in our opinion, to set the context in terms of recent, current and potential future trends in the UK economy, particularly retail expenditure.

Overview

- 3.2 The outbreak of coronavirus (Covid 19), and measures to contain it, have had a considerable impact on the UK and global economies, seeing three national lockdowns, and some form of restrictions on economic life for almost 24 months. Over this period, the UK economy suffered an unprecedented contraction; 600,000 fewer people were employed and over 9 million employees were furloughed. Consumer demand suffered during this time, given social distancing and low confidence, leading to a big drop in social consumption, especially for recreation, leisure and travel. In addition, investment fell markedly, as waning business confidence and deteriorating financial positions led to the postponement and cancellation of projects.
- 3.3 Exports have also been undermined by a fall in international demand for UK goods and services, as other countries enforced lockdown or social distancing measures to varying degrees. The temporary closure of factories and businesses meant disruptions to supply chains, reverberations of which remain on-going. Since then, a steady recovery in services, manufacturing and construction have all seen the UK's GDP rise above its pre-pandemic level as of November 2021. However, the behavioural shifts due to the Covid 19 Omicron variant concerns have weighed on economic activity around the start of 2022. Further into the year, the pace of the rebound remains uncertain and its sustainability at risk given inflationary and cost of living headwinds.
- 3.4 The success of the Coronavirus Job Retention Scheme ('CJRS') meant that any sharp spike in the unemployment rate did not materialise, at least immediately. Whilst a positive labour market outlook with soaring vacancies should lubricate the wheels of the economic recovery, a slight rise in unemployment may still emerge as redundancy periods are worked through following the CJRS lifting.
- 3.5 Looking beyond the impact of Covid 19, the bigger risk to the economy in the latter part of 2022 and going into 2023 is rising inflation (and wages not able to keep up), along with severe increases in the cost of energy and rising interest rates. As of Summer 2022, the following forecasts from the Bank of England provide relevant background information for the purposes of this study:
- At its meeting in August 2022, the Bank of England's Monetary Policy Committee ('MPC') voted by a majority of 8-1 to increase interest rates by 0.5 percentage points to 1.75%. This is against a backdrop of historically very low interest rates over many years and is starting to have an impact upon the housing market and the affordability of some mortgages. Further increases are now likely towards the end of 2022 and in to 2023.
 - Inflationary pressures in the United Kingdom and the rest of Europe have intensified significantly in 2022, which largely reflects a near doubling in wholesale gas prices since May 2022, owing to Russia's restriction of gas supplies to Europe and the risk of further curbs. As this feeds through to retail energy prices, it will exacerbate the fall in real incomes for UK households and further increase UK CPI inflation in the near term. CPI inflation is expected to rise more than forecast, from 9.4% in June 2022 to just over 13% in 2022 Q4, and to remain at very elevated levels throughout much of 2023, before falling to the 2% target two years ahead.
 - GDP growth in the United Kingdom is slowing. The latest rise in gas prices has led to another significant deterioration in the outlook for activity in the United Kingdom and the rest of Europe. The United Kingdom is now projected to enter recession from the fourth quarter of this year. Real

household post-tax income is projected to fall sharply in 2022 and 2023, while consumption growth turns negative.

- Domestic inflationary pressures are projected to remain strong over the first half of the forecast period. Firms generally report that they expect to increase their selling prices markedly, reflecting the sharp rises in their costs. The labour market has remained tight, with the unemployment rate at 3.8% in the three months to May 2022 and vacancies at historically high levels. As a result, underlying nominal wage growth is expected to be higher than previously expected.
- Inflationary pressures are nevertheless expected to dissipate over time. Global commodity prices are assumed to rise no further, and tradable goods price inflation is expected to fall back, the first signs of which may already be evident. Although the labour market may loosen only slowly in response to falling demand, unemployment is expected to rise from 2023. Domestic inflationary pressures are therefore expected to subside in the second half of the forecast period, as the increasing degree of economic slack and lower headline inflation reduce the pressure on wage growth.

Consumer spending

- 3.6 Household spending rose by 2.7% quarter on quarter in the third quarter of 2021, making the largest contribution to expenditure, following the easing of public health restrictions. Spending on hospitality, travel and leisure all rose over this period. Retail, despite being a star performer during the pandemic, experienced weaker performance over this period of easing restrictions as consumers substituted away from durable goods to services. Experian has forecasted that this substitution from durable goods to services will persist, as inflationary pressures are higher in the former category, as compared to the latter. This will weigh on retail spending growth in the near term.

Retail

- 3.7 Retail sales volumes, despite being an area of economic activity with the swiftest recovery to pre-pandemic levels, has more recently lagged, with volumes falling the most since the third lockdown. Sales remained elevated through the second half of 2021, though have since tailed off in 2022, as consumers substituted away from durable goods consumption, instead spending more in areas of the economy that had been, up to that point, locked down, i.e. travel and leisure.
- 3.8 Hence, and as corroborated by the latest statistics, the biggest contributor to the most recent decline were non-food stores (includes department, clothing, household goods and other non-food stores). Additionally, sales of automotive fuel suffered with the reinstatement of work from home guidance in 2021, removing commuting costs for many office-workers. Signifying its relative strength, online sales have remained high in proportional terms, though this category of goods also saw sales volumes contract.
- 3.9 Looking ahead, spending growth over the rest of 2022 and into 2023 is expected to weaken significantly as worsening economic headwinds affect consumer fundamentals. The Russia-Ukraine conflict is now having significant impacts across a number of sectors, particularly in fuel/energy costs.
- 3.10 Prospects for spending on comparison goods remain weak as discretionary spending is curbed but some product areas should buck this trend. For example, heightened residential repair and maintenance activity could provide a temporary boost for related products such as DIY equipment, household goods and furnishings. Also, the shift to greater spending online for both convenience and comparison goods is expected to persist in the near term, with any correction materialising upon the lifting of all public health measures.
- 3.11 With regards to retail expenditure, it is useful to compare the forecast annual changes in spending per head on convenience and comparison goods from the time of the 2013 retail study and the latest

available forecasts from Experian. Table 3.1 below shows the year-on-year change from Experian's Retail Planner Briefing Note 11⁹ for 2013-2031, which was referenced in the 2013 retail study, and compares this against the latest forecasts from Experian's Retail Planner Briefing Note 19¹⁰ for the same time period.

- 3.12 Table 3.1 indicates that the latest Experian forecasts are showing a materially lower rate of growth in per capita convenience goods spending: -1.2% up to 2031, compared with +9.1% from the time of the 2013 study.

Table 3.1: forecast year-on-year change in per capita convenience goods spending between 2013 and 2031

Year	Experian Retail Planner Briefing Note 11 (2013) (% change year-on-year)	Experian Retail Planner Briefing Note 19 (2022) (% change year-on-year)
2013	-1.0	-0.4
2014	-0.6	-0.4
2015	-0.1	-2.2
2016	0.4	3.5
2017	0.6	-0.3
2018	0.6	-0.4
2019	0.6	-1.6
2020	0.7	7.2
2021	0.5	-4.6
2022	0.8	-1.4
2023	0.8	-0.2
2024	0.8	-0.2
2025	0.7	-0.1
2026	0.6	-0.1
2027	0.6	-0.1
2028	0.7	0.0
2029	0.8	0.0
2030	0.8	0.0
2031	0.8	0.1
Change, 2013-2031	+9.1	-1.2

Source: Experian Retail Planner Briefing Notes 11 and 19. Excludes purely internet-based sales.

⁹ October 2013

¹⁰ January 2022

- 3.13 Table 3.2 below undertakes a similar exercise for all comparison goods per capita expenditure, using the same Experian Retail Planner Briefing Notes.

Table 3.2: forecast year-on-year change in all per capita comparison goods spending between 2013 and 2031

Year	Experian Retail Planner Briefing Note 11 (% change year-on-year)	Experian Retail Planner Briefing Note 19 (% change year-on-year)
2013	3.2	5.6
2014	2.3	2.3
2015	2.8	6.0
2016	2.9	5.0
2017	2.9	3.9
2018	3.1	1.0
2019	3.1	2.2
2020	3.0	1.6
2021	3.0	1.9
2022	2.9	2.1
2023	2.9	2.8
2024	2.9	2.8
2025	2.9	2.8
2026	2.8	2.8
2027	2.9	2.9
2028	2.9	2.9
2029	2.9	2.9
2030	2.8	2.9
2031	2.8	2.9
Change, 2013-2031	+55.0	+57.3

Source: Experian Retail Planner Briefing Notes 11 and 19

- 3.14 The above data shows very little difference between the total comparison goods (per capita) expenditure forecasts in the 2013 study and this latest study. Growth up to 2031 (from 2013 levels) is now forecast to be very slightly higher, at +57.3%.
- 3.15 However, as the data in Table 3.3 below shows, when spending on comparison goods via purely internet-based sales is stripped out of the forecasts then the differences are significant. At the time of the 2013 retail study, per capita spending via physical comparison goods stores (including internet-related sales associated with physical stores) was forecast to rise by circa +48.7% up to 2031. However, the latest comparable forecasts published by Experian show that forecast (per capita) expenditure growth up to 2031 will now be much lower at circa +35.3%.

Table 3.3: forecast year-on-year change in per capita comparison goods spending between 2013 and 2031 (excluding pure internet sales)

Year	Experian Retail Planner Briefing Note 11 (% change year-on-year)	Experian Retail Planner Briefing Note 19 (% change year-on-year)
2013	2.9	4.9
2014	1.4	1.7
2015	2.0	5.7
2016	2.1	3.4
2017	2.1	1.6
2018	2.2	-0.8
2019	2.3	0.8
2020	2.4	-7.6
2021	2.8	0.5
2022	2.7	5.9
2023	2.8	1.8
2024	2.9	1.8
2025	2.9	1.9
2026	2.8	2.0
2027	2.8	2.1
2028	2.9	2.3
2029	2.9	2.4
2030	2.9	2.4
2031	2.9	2.5
Change, 2013-2031	+48.7	+35.3

Source: Experian Retail Planner Briefing Notes 11 and 19. Figures include spending via the internet which is fulfilled via physical stores.

- 3.16 The continued increasing influence of comparison goods shopping via the internet is demonstrated by the figures in Table 3.4 below which show the rise in market share in this channel. At the time of the 2013 retail study, the market share of sales via the internet were forecast to rise from 10.8% in 2013 to 15.9% in 2031. However, the forecast level of growth in market share to 2031 has now significantly increased to circa 23.9% in 2022 and circa 28.6% in 2031.
- 3.17 It is therefore clear from the latest (2022) Experian forecasts that there will be a materially lower amount of available comparison goods expenditure to support in-centre and out-of-centre comparison goods floorspace.

Table 3.4: market share of internet sales for comparison goods shopping, 2012-2029

Year	Experian Retail Planner Briefing Note 11	Experian Retail Planner Briefing Note 19
2013	10.8	11.4
2014	11.6	11.9
2015	12.3	12.3
2016	13.0	13.7
2017	13.8	15.6
2018	14.5	17.1
2019	15.1	18.2
2020	15.5	25.6
2021	15.7	26.6
2022	15.9	23.9
2023	15.9	24.7
2024	15.9	25.4
2025	15.9	26.1
2026	15.9	26.7
2027	16.0	27.2
2028	16.0	27.6
2029	16.0	28.0
2030	15.9	28.3
2031	15.9	28.6

Source: Experian Retail Planner Briefing Notes 11 and 19.

4. Town Centre Health Checks

Introduction

- 4.1 In order to provide an updated set of baseline evidence base information regarding town centre health issues, this Study has gathered and analysed key information in relation to two key areas: land use profile and shopping patterns / visitation rate data. This data has been gathered for the three main town centres and the three district centres in Torquay and Paignton.
- 4.2 In relation to land use data, we have, in line with previous studies, utilised TC's regular retail monitor data for each of town and district centres. These surveys collect data for all land uses within the defined boundary of each centre and we have classified this data into the standard convenience, comparison, service, other retail and vacant categories using the standard Experian GOAD 'centre report' classification. Due to the way in which the data is collected and classified, a comparison over time can be problematic and therefore we just provide the latest 2021 data collected by TC.
- 4.3 In order to provide a comparison over time we have therefore also obtained the latest land use survey data for each of the centres (apart from The Willows) from Experian GOAD. GOAD data for the three town centres was also contained in the previous 2013 study.
- 4.4 In relation to shopping patterns and visitation rate data, we have utilised the results of the latest household survey data, collected between January and February 2022. The survey was commissioned specifically for this Study and covered a wide area across the Torbay administrative area and into the neighbouring authorities of South Hams and Teignbridge. The survey area has been split into seven separate zones to coincide with the zones used in previous household surveys, with Zones 3, 4 and 5 covering the three main settlements in Torbay. A plan showing the full extent of the household survey area, along with the constituent zones, is contained at Appendix I to this document.
- 4.5 The use of the 2022 household survey in the context of the 'town centre' health check reviews is important as it enables the Study to build up a picture of the catchment area of each centre, its popularity for different types of shopping (plus F&B visits) and its relative market penetration against other centres and out of centre stores.
- 4.6 In relation to shopping patterns, the following data has been analysed for the health check analysis:
- Convenience goods shopping. Data has been gathered in relation to main and top-up food shopping trips. In order to build up a comprehensive picture of food shopping trips across Torbay, the 2022 survey has asked survey respondents for first and second choice main and top-up food shopping destinations.
 - Comparison goods shopping. The 2022 survey has gathered data in relation to different types of comparison goods shopping, including: clothing/footwear; furniture/floorcoverings/household textiles; DIY goods, domestic appliances; smaller electrical goods; health and beauty goods; recreational goods. In line with the approach taken in relation to convenience goods shopping, the 2022 survey has gathered data in relation to first and second choice destinations for each of the above comparison goods categories.
- 4.7 In addition to shopping, the 2022 household survey also gathered data on the usage of food and beverage facilities, which has contributed to both our assessment of town centre health and also an assessment of quantitative capacity.

4.8 Finally, the 2022 household survey also included a series of questions regarding the usage of the three main town centres in Torbay¹¹. The information which has been gathered has covered the following areas:

- frequency of visits to each centre
- changes to visitation rates as a consequence of the Covid 19 pandemic
- main reasons for visiting each centre
- usual time of day of visiting the centre
- model of travel to the centre
- likes, dislikes and suggested improvements for each centre
- if the closest town centre is not visited¹², which alternate centre is used (and the reasons why)

4.9 We now turn to the key evidence base data for each centre in turn.

Torquay Town Centre

4.10 Within the adopted Local Plan policies map¹³, Torbay town centre has four notable designations: the town centre boundary, the primary shopping area boundary, along with separate primary and secondary shopping frontages. These are described in turn below, and shown on plans contained in appendices at the rear of this document.

4.11 The boundary / frontage definitions in Torquay town centre are as follows:

- Town centre¹⁴. The town centre boundary stretches from the junction of Union Street and Trematon Avenue in the north (including the Town Hall and adjacent car park) southwards along Union Street¹⁵ and Fleet Street towards the harbour area, encompassing Victoria Parade, Beacon Hull and The Terrace around its southern edge.
- Primary shopping area ('PSA')¹⁶. The defined PSA covers a much smaller area than the town centre boundary, focusing on either side of Union Street (including the Union Square shopping centre) plus the Tesco unit on the northern edge of Fleet Street.
- Primary shopping frontage¹⁷. This designation covers the frontages of the same buildings included within the PSA, along with several units on The Strand opposite the harbour area.
- Secondary shopping frontage¹⁸. Including building frontages along Union Street (up the junction with Castle Circus), Pimlico, Lower Union Lane, Fleet Street, Cary Parade, Vaughan Parade, the western end of Torwood Street and Victoria Parade.

4.12 With regards to the land use profile of the town centre, the results of the 2021 TC Retail Monitor research are contained in Table 4.1 below. As discussed above, the raw TC land use data has been classified into convenience, comparison, service, other and vacant categories using Experian GOAD's 'centre report' definitions which means that not all of the land uses within the town centre boundary are included within the data below.

¹¹ the survey was structured to ask survey respondents in a particular zone about their nearest main town centre. For example, residents of Zone 5 (which covers the Torquay urban area) were asked about Torquay town centre; residents of Zone 3 (which covers the Brixham urban area) were asked questions about Brixham town centre.

¹² i.e. those residents of Zone 4 who do not visit Paignton town centre

¹³ Appendix II

¹⁴ Appendix III

¹⁵ including the Union Square Shopping Centre

¹⁶ Appendix IV

¹⁷ Appendix V

¹⁸ Appendix V

Table 4.1: Torquay town centre land use profile – Torbay Council 2021 Retail Monitor Data

Sector	No. of Units	% of Total Surveyed Units
Convenience	25	6.4%
Comparison	132	34.0%
Service	145	37.4%
Other	0	0.0%
Vacant	86	22.2%
Total	388	100%

Source: Torbay Council Retail Monitor 2021

- 4.13 The above data indicates that, of the units surveyed, around one third are each devoted with comparison goods retail and retail service uses, with retail service uses forming the largest grouping in the centre at 37% of all surveyed units. This is a similar profile to the one observed in the 2013 retail study¹⁹. A similar picture emerges in relation to the proportion of convenience goods retailers within the town centre (circa 6%).
- 4.14 In relation to the proportion of vacant units surveyed in the 2021 Retail Monitor, 86 units were identified which comprise around one fifth (22%) of all surveyed units. This is an increase in the proportion of vacancies identified in the 2013 retail study, from 15.2%²⁰.
- 4.15 Turning to the Experian GOAD land use data, Table 4.2 below provides the latest (June 2021) survey data and places it alongside data quoted in the previous 2013 retail study (for the years 2006, 2010 and 2013). The contents of Table 4.2 show that following a steady decrease in the number and proportion of convenience goods units between 2006 and 2013, there has been an increase to 31 units (or 7.8% of all surveyed units) as of 2021. This increase is in line with the growth in the proportion of convenience goods retailers in town centres nationally, although the proportion of this type of retail in Torquay town centre (7.8%) remains below the national average of 10.2%.

Table 4.2: Torquay town centre land use profile – Experian GOAD data

Sector	August 2006			July 2010			July 2013			June 2021		
	No.	%	GB Ave %	No	%	GB Ave %	No	%	GB Ave %	No	%	GB Ave %
Convenience	34	8.3	9.2	31	7.3	9.2	22	5.3	8.7	31	7.8	10.2
Comparison	208	50.7	45.7	177	41.8	41.8	171	41.0	41.2	128	32.2	34.1
Service	123	30.0	33.1	135	31.8	34.7	144	34.5	36.3	148	37.3	39.4
Other	5	1.2	1.3	6	1.4	1.2	3	0.7	1.2	7	1.8	1.0
Vacant	40	9.8	10.7	75	17.7	13.0	77	18.5	12.6	83	20.9	15.2
Total	410	100	100	424	100	100	416	100	100	397	100	100

Source: Experian GOAD

- 4.16 The decline in the number and proportion of comparison goods retailers since 2006 has continued an intensified since 2013, with a fall from 171 in 2013 to 128 in 2021. The proportion of surveyed units in comparison goods retail use in the town centre has fallen from 41% in 2013 to 32% in 2021. This trend is not unique to Torquay, however, as demonstrated by the corresponding fall in the national average, from 41% in 2013 to 34% in 2021.

¹⁹ see Table B on page 36 of the 2013 retail study

²⁰ Table B, page 36, 2013 retail study

- 4.17 The number of retail service uses in the town centre has increased very slightly between 2013 and 2021, from 144 to 148. The proportion of retail service uses in the town centre remains very slightly below the national average, although the small increase in the proportion of these uses mirrors the national average trend.
- 4.18 Finally, the proportion of vacant retail units in the town centre, as surveyed by Experian GOAD, stands at circa 21%, which is a similar proportion to that identified as part of the TC Retail Monitor data. The proportion of vacancies is well above the national average for vacancies in town centres of circa 15.2%, although the increase in vacancies in Torquay mirrors the national trend.
- 4.19 Table 4.3 below outlines the amount of ground floor floorspace within each of the main land use categories, using the results of the 2021 Experian GOAD survey.

Table 4.3: Torquay town centre floorspace profile

Sector	Floorspace (sq m gross ground floor)	% of Total Surveyed Floorspace	National Average (%)
Convenience	6,698	9.6%	18.8%
Comparison	26,598	38.0%	38.7%
Service	17,243	24.6%	25.7%
Other	725	1.0%	0.7%
Vacant	18,757	26.8%	16.1%
Total	70,021	100%	100%

Source: Experian GOAD

- 4.20 Table 4.3 indicates that around 10% of surveyed floorspace is occupied by convenience goods retailers, which is broadly half of the national average rate and indicates that convenience goods retailers in Torquay town centre are comparatively small in scale. Around two-thirds of space is occupied by comparison goods retailers or retail service uses, which is commensurate with the national average. Just over one quarter (26.8%) of surveyed floorspace was found to be vacant, which is well above the national average for vacant town centre floorspace of 16.1%.
- 4.21 With regards to shopping patterns, Table 4.4 below outlines the market share of convenience goods stores in Torquay for first and second choice main food shopping trips across each of the study area zones from the 2013 and 2022 retail studies.

Table 4.4: first and second choice main food shopping market shares associated with town and district centres in Torquay (2013 and 2022 retail studies)

CENTRE	First Choice Main Food							Second Choice Main Food						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
2013 Retail Study														
Torquay town centre	0%	0%	0%	9%	0%	0%	0%	0%	1%	1%	8%	0%	0%	0%
The Willows district centre	0%	2%	9%	53%	5%	3%	8%	3%	11%	10%	36%	15%	4%	13%
St Marychurch district centre	0%	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
2022 Retail Study														
Torquay town centre	1%	0%	0%	4%	0%	0%	0%	0%	0%	0%	3%	0%	0%	0%
The Willows district centre	0%	2%	7%	27%	4%	1%	3%	5%	2%	10%	34%	7%	4%	12%
St Marychurch district centre	0%	0%	1%	1%	0%	0%	0%	0%	0%	1%	2%	0%	0%	0%

4.22 The above data shows that, in relation to Torquay town centre, there was a low level of market penetration for main food shopping trips several years, with the primary catchment restricted to Zone 5 of the study area. The town centre achieved a 9% share of first choice main food trips and 8% of second choice main food trips in this zone. The results of the 2022 household survey indicate that these (already low) market shares have fallen (broadly halved) over the past decade to 4% for first choice main food trips and 3% for second choice trips from Zone 5 residents.

4.23 Table 4.5 below performs the same exercise, but for top-up food shopping trips from the various parts of the study area.

Table 4.5: first and second choice main food shopping market shares associated with town and district centres in Torquay (2013 and 2022 retail studies)

CENTRE	First Choice Top-Up Food							Second Choice Top-Up Food						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
2013 Retail Study														
Torquay town centre	0%	1%	0%	21%	2%	0%	0%	0%	0%	3%	11%	0%	0%	0%
The Willows district centre	0%	3%	0%	17%	1%	0%	2%	0%	7%	5%	12%	6%	5%	4%
St Marychurch district centre	0%	0%	0%	5%	0%	0%	0%	0%	0%	0%	3%	0%	0%	0%
2022 Retail Study														
Torquay town centre	0%	0%	1%	7%	0%	0%	0%	0%	0%	0%	9%	0%	0%	0%
The Willows district centre	0%	2%	2%	7%	0%	0%	0%	2%	2%	1%	15%	10%	0%	4%
St Marychurch district centre	0%	0%	0%	6%	0%	2%	0%	0%	0%	0%	12%	0%	0%	0%

4.24 The data contained in Table 4.5 shows that the primary catchment area for Torquay town centre for top-up food shopping is also Zone 5, although small amounts of trade are also attracted from Zones 3,

4, 6 and 8 (which may be a product of the wider attractiveness of the town centre for non-food shopping, leisure, and as an employment centre).

4.25 The above data shows that there has been a drop in the market share of the town centre for both first and second choice shopping trips. Within Zone 5 and for the 2013 retail study, 21% of residents stated that they visited Torquay town centre as their first choice destination, which has dropped to 7% in 2022. In relation to second choice trips, there has been a small decrease from 11% to 9% amongst Zone 5 residents between 2013 and 2022.

4.26 Table 4.6 provides a similar exercise for comparison goods shopping market shares associated with Torquay town centre

Table 4.6: first and second choice comparison goods market shares associated with Torquay town centre (2013 and 2022 retail studies)

CENTRE	First Choice Destination							Second Choice Destination						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
2013 Retail Study														
Clothes / footwear	18%	35%	38%	62%	13%	3%	14%	23%	27%	20%	28%	16%	16%	14%
Furniture / floorcoverings / textiles	12%	25%	32%	42%	6%	2%	3%	8%	18%	19%	33%	12%	19%	10%
DIY goods	2%	3%	14%	14%	1%	0%	1%	4%	1%	7%	14%	2%	2%	2%
Domestic appliances	7%	4%	23%	21%	3%	1%	6%	9%	6%	4%	13%	9%	5%	7%
Small electrical goods	12%	7%	19%	22%	4%	3%	9%	11%	8%	19%	16%	17%	10%	3%
Personal / luxury goods	9%	21%	27%	72%	3%	1%	5%	13%	21%	25%	39%	21%	8%	16%
Recreational goods	25%	40%	41%	52%	2%	0%	3%	13%	15%	26%	39%	4%	11%	8%
2022 Retail Study														
Clothes / footwear	19%	10%	17%	35%	15%	3%	7%	10%	17%	17%	30%	6%	0%	6%
Furniture / floorcoverings / textiles	1%	6%	4%	12%	7%	0%	0%	6%	11%	6%	7%	4%	0%	22%
DIY goods	6%	1%	1%	2%	0%	0%	0%	4%	3%	2%	9%	1%	0%	0%
Domestic appliances	2%	6%	1%	4%	0%	0%	0%	10%	9%	2%	4%	9%	0%	0%
Small electrical goods	6%	3%	2%	9%	7%	0%	0%	0%	10%	0%	12%	0%	0%	0%
Personal / luxury goods	5%	10%	4%	35%	2%	0%	1%	5%	25%	20%	31%	7%	0%	7%
Recreational goods	2%	8%	10%	31%	2%	8%	4%	14%	14%	12%	45%	3%	0%	0%

4.27 The data in Table 4.6 above indicates the following:

- The above indicates that the core shopping catchment for Torquay town centre for comparison goods remains Zone 5, although across all goods categories the centre's market share as a first choice shopping destination has fallen between 2013 and 2022.

- There is a slightly different picture in relation to the market share of the town centre as a second choice comparison goods shopping destination, where there have not been any material falls in market share for non-bulky comparison goods amongst one 5 residents, but falls in relation to bulky goods.
- Looking beyond Zone 5, Torquay town centre's catchment area stretches across the whole of the study area, with a reasonably significant number of trips being attracted from Zone 2 (Totnes / South Hams), then Zones 6, 7 and 8 (Teignbridge).
- In relation to Zone 2, the town centre's popularity as a first choice clothing/footwear destination has not diminished although there have been decreases in other categories. The opposite is generally true in relation to the town centre as a second choice shopping destination for the various comparison goods categories.
- With regards to the study area zones to the north of Torbay (Zones 6, 7 and 8), there has been very little change in the amount of first choice shopping trips from Zone 6 residents, although there has been a general worsening of the town centre's market share for first and second choice trips across the other two zones.

4.28 As part of the assessment of quantitative retail floorspace need, it has been possible to compare the retail turnover of the main town centres between the current assessment (in 2022) and the previous assessment contained in the 2013 retail study. This has confirmed that the town centre continues to lose significant amounts of turnover, including circa half of its convenience goods turnover and one third of its comparison goods turnover (when compared with the assessments made in the 2013 retail study).

4.29 The household survey commissioned for this study has also gained information on visits to food and beverages in the local area from study area residents. In relation to Torquay town centre, the amalgamated results of the survey show that Torquay town centre gains 4% of trips from Zone 3 residents, 26% from Zone 4, 61% from Zone 5 and 15% from Zone 6.

4.30 Beyond, the market shares associated with shopping in the town centre, the 2022 household survey has also gathered information in relation to the usage of the three main town centres. In relation to Torquay town centre, the 2022 survey provides the following information:

- Of those survey respondents in Zone 5 who visited Torquay town centre, 21% visited at least once a week.
- in terms of frequency of visits to the town centre, respondents were also asked whether the recent COVID-19 pandemic has influenced their behaviour towards the centre. 60% of respondents indicated that the pandemic had not changed the frequency of visits to the town centre, although 32% of respondents indicated that they were visiting less often. The reasons for this were varied, although the most prevalent reasons were related to safety concerns, the closure of shops over the last two years and the resultant range of shops.
- In relation to the facilities which are visited on trips to Torquay town centre, circa 60% of respondents from Zone 5 indicated that they used the town centre for non-food shopping. This is, by far, the highest of the three town centres in Torbay²¹. In relation to other purposes, 9% of respondents use the centre for main food shopping and 8% use it for top-up food shopping. 15% of respondents indicate that they visit the town centre to 'eat out', whilst 13% use financial services and 11% use healthcare services.
- The most popular times of the day to visit Torquay town centre are between 6am and noon (41%) and noon – 3pm (38%). These are also the most popular times for the other two town centres, although the 2022 survey indicates that Torquay town centre has the highest level of visits in the

²¹ the other two being around 40% usage

early to mid-afternoon. In relation to other times, only 6% visit the centre between 3pm-7pm and 3% visit between 7pm and 2am.

- 59% of survey respondents travel to Torquay town centre by car, with 26% walking to the centre and 12% using the bus.
- With regards to overall visits to Torquay town centre, 15% of Zone 5 residents indicated that they never visit the centre, with the main reasons cited for not visiting being: range of shops (45%), safety (17%), empty shops (21%), COVID-related reasons (14%), plus costs of car parking (12%).
- For those survey respondents not visiting Torquay town centre, the most popular alternative destinations were Newton Abbott (24%), Exeter (19%), The Willows district centre (4%) and Paignton (4%). The main reasons given for visiting these other centres were: better choice of shops (36%), lower parking costs (26%), easier to park (17%), a more attractive environment (13%), quality of shops (19%) and levels of business (11%).

4.31 In conclusion, and drawing upon the foregoing analysis, the following conclusions can be reached in relation to the key aspects of the health of Torquay town centre:

- Continuing the trend seen in previous retail studies, there is a falling number of comparison goods shops in the town centre. This is also part of a national trend in other town centres across the country, but is nevertheless a key issue for the Council to be aware of as it plans for the future of Torquay town centre.
- Again, in line with the national trend, the evidence which has been collected for this study indicates a slight strengthening of convenience goods shopping provision in the town centre. It is not significant, but nevertheless helps to address a long-standing qualitative need in the centre and, in turn, broadens the type of provision.
- It is notable that service uses are now the largest sector in the town centre in terms of the number of units. A growing number of service uses in a town centre mirrors the national trend, but this data also is reflective of Torquay town centre's role.
- A key concern will be the continued loss of retailing market share and turnover in the town centre. Whilst all town centres are facing similar challenges, this is trend which has continued for some time in Torquay and highlights why the Council will need to consider the main role of the town centre going forwards (and the need to diversify its offer).
- A related part of this issue is the continued high number / proportion of vacancies in the town centre, which well above the national average.

Paignton Town Centre

4.32 Paignton town centre lies in the central part of the Torbay and is the second largest of the three town centres. The centre lies adjacent to the seafront area, with the adopted development plan policies map²² providing the following definitions:

- Town centre (Appendix VII). The defined town centre boundary stretches westwards along Torbay Road from the seafront / beach area, across the railway line, and then along Victoria Street, Hyde Winner Street.
- Primary shopping area (Appendix VII). The defined primary shopping area covers around half of area of the (wider) town centre boundary and covers the western part of Torbay Road (and the Victoria shopping centre), Victoria Street, the Crossways shopping centre, along with the immediate area around the junction of Torquay Road and Palace Avenue.

²² Appendix VI

- Primary shopping frontage (Appendix IX). The defined primary shopping frontages in Paignton town centre are confined to either side of Victoria Street.
- Secondary shopping frontage (Appendix IX). The defined secondary shopping frontages generally cover the remainder of the defined town centre boundary which is not covered by the primary shopping frontage designation.

4.33 Like Torquay town centre, the land use profile of Paignton town centre has been assessed based upon data from the Council's Retail Monitor and also Experian GOAD data. Table 4.7 below outlines a summary of this data.

Table 4.7: Paignton town centre land use profile – Torbay Council 2021 Retail Monitor Data

Sector	No. of Units	% of Total Surveyed Units
Convenience	30	9.2%
Comparison	97	29.7%
Service	115	35.2%
Other	1	0.3%
Vacant	84	25.7%
Total	327	100%

Source: Torbay Council Retail Monitor 2021

4.34 The above data indicates that, of the units surveyed and classified for the purpose of this analysis, just over one third (35%) are occupied by retail service uses. A slightly lower proportion (circa 30%) of units are occupied by comparison goods retailers. Convenience goods retailers occupy around 9% of all surveyed units, whilst a quarter of units were vacant at the time of the survey. It will be noted that there has been a significant fall in the number of units classified in the (Retail Monitor) analysis between 2013 and 2021. The reasons for this are not entirely clear although the main differences related to falls in the number of comparison goods and retail service units and an increase in the number of vacant retail units.

4.35 Turning to the Experian GOAD land use data, Table 4.8 below provides the latest (November 2021) survey data and places it alongside data quoted in the previous 2013 retail study (for the years 2006, 2009 and 2013). The contents of Table 4.8 show a small decline in the number of classified units, now at its lowest level (by a small margin) since 2006. The number of identified vacancies within the town centre is lower than the TC Retail Monitor data, although the proportion of vacancies (17%) is above the national average for town centre vacancy levels (15%).

Table 4.8: Paignton town centre land use profile – Experian GOAD data

Sector	August 2006			October 2009			January 2013			November 2021		
	No.	%	GB Ave %	No	%	GB Ave %	No	%	GB Ave %	No	%	GB Ave %
Convenience	33	11.0	9.2	31	10.5	9.3	24	8.0	8.7	30	10.3	10.2
Comparison	146	48.8	45.7	125	42.4	41.8	125	41.4	41.2	96	33.1	34.1
Service	95	31.8	33.1	96	32.5	34.7	103	34.1	36.3	110	37.9	39.4
Other	5	1.7	1.3	5	1.7	1.2	3	1.0	1.2	3	1.0	1.0
Vacant	20	6.7	10.7	38	12.9	13.0	47	15.6	12.6	51	17.6	15.2
Total	299	100	100	295	100	100	302	100	100	290	100	100

Source: Experian GOAD

4.36 The decline in the number and proportion of comparison goods retailers since 2006 has continued, with the loss of 29 comparison goods retailers between 2013 and 2021. The proportion of comparison

goods retailers in the centre is now just slightly below the national average, although it should also be noted that the fall in comparison goods retailers in Paignton does mirror the national trend for this type of land use in town centres.

- 4.37 Following a steady decline in the number of convenience goods retailers between 2006 and 2013, from 33 to 24, the number of retailers has increased to 30 between 2013 and 2021. Due to corresponding increases in the national average proportion of convenience goods retailers in town centres over the past several years, the proportion of convenience goods retailers in the town centre continues to be in line with the national average.
- 4.38 The number of retail service uses in the town centre has continued to grow since 2013 and now comprise the largest grouping of uses in the town centre, at 37% of all classified units. The proportion of retail service uses in the town centre remains very slightly below the national average, although the small increase in the proportion of these uses mirrors the national average trend.
- 4.39 Table 4.9 below outlines the amount of ground floor floorspace within each of the main land use categories, using the results of the 2021 Experian GOAD survey.

Table 4.9: Paignton town centre floorspace profile

Sector	Floorspace (sq m gross ground floor)	% of Total Surveyed Floorspace	National Average (%)
Convenience	5,444	12.7%	18.8%
Comparison	16,667	38.7%	38.7%
Service	14,251	33.1%	25.7%
Other	502	1.2%	0.7%
Vacant	6,159	14.3%	16.1%
Total	43,203	100%	100%

Source: Experian GOAD

- 4.40 Table 4.9 indicates that around circa 13% of surveyed floorspace is occupied by convenience goods retailers, which is below the national average rate (18.8%) and indicates that convenience goods retailers in Torquay town centre are comparatively small in scale.
- 4.41 The sector with the highest floorspace footprint in Paignton town centre is the comparison goods sector, with 39% of all floorspace. This is commensurate with the national average. Whilst the retail service sector has the largest number of occupiers in the town centre, with 38% of all units, it occupies less space than the comparison goods retail sector (33%). Nevertheless, the large amount of retail service businesses in the centre means that the proportion of ground floor space devoted to these uses is still above the national floorspace average for this particular sector.
- 4.42 Finally, Table 4.9 indicates that 14.3% of all ground floor space was vacant at the time of the most recent Experian GOAD survey in 2019. It is to be noted that this proportion of floorspace is below the national average, as opposed to the proportion of units which is above the national average. This would, therefore, suggest that the size of vacant units within the town is on the small side.
- 4.43 Turning to shopping patterns, Tables 4.10 and 4.11 below outline the convenience goods market shares for Paignton for both main and top-up food shopping across each of the study area.

Table 4.10: first and second choice main food shopping market shares associated with Paignton town centre and Preston district centre (2013 and 2022 retail studies)

CENTRE	First Choice Main Food							Second Choice Main Food						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
2013 Retail Study														
Paignton town centre	0%	1%	10%	0%	0%	0%	0%	2%	5%	29%	0%	0%	0%	0%
Preston district centre	0%	4%	6%	0%	0%	0%	0%	0%	4%	9%	1%	0%	0%	0%
2022 Retail Study														
Paignton town centre	2%	4%	8%	0%	0%	0%	0%	0%	4%	9%	0%	0%	0%	0%
Preston district centre	0%	7%	4%	0%	0%	0%	0%	0%	5%	4%	0%	0%	0%	0%

Table 4.11: first and second choice top-up food shopping market shares associated with Paignton town centre and Preston district centre (2013 and 2022 retail studies)

CENTRE	First Choice Top-Up Food							Second Choice Top-Up Food						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
2013 Retail Study														
Paignton town centre	0%	1%	30%	1%	0%	0%	0%	0%	3%	37%	1%	0%	0%	0%
Preston district centre	0%	0%	19%	1%	0%	0%	0%	0%	0%	23%	4%	0%	0%	0%
2022 Retail Study														
Paignton town centre	2%	1%	18%	0%	0%	0%	0%	0%	2%	29%	0%	0%	0%	0%
Preston district centre	0%	2%	16%	1%	0%	0%	0%	0%	5%	19%	0%	0%	0%	0%

- 4.44 The above data shows that the core main food shopping catchment of Paignton town centre comprises Zone 4 of the study area. Based upon the results of the 2022 household survey, convenience goods stores in the town centre attract 8% of first choice main food trips from Zone 4, which is a small fall from a 10% market share recorded in the 2013 retail study. Of the overall 8% market share amongst Zone 4 residents, circa 6% is assigned to the Lidl store in the Victoria shopping centre. This is a change from the previous household survey results, when the Tesco store was the most popular first choice destination in the town centre.
- 4.45 The secondary catchment for first choice main food trips associated with Paignton town centre comprises Zone 3 and, to a lesser extent, Zone 2. The market shares in these two zones are small, at 4% and 2% respectively, although the market penetration in these two areas has grown slightly since the 2013 retail study.
- 4.46 A similar, but not identical, situation occurs in relation to second choice main food shopping trips. Zone 4 comprises the primary catchment, with Zone 3 comprising the secondary catchment. A comparison between the two sets of household shopping patterns data reveals a sharp drop in the town centre's market share amongst Zone 4 residents (from 29% to 9%). In contrast, the (smaller) market share amongst Zone 3 residents has not dropped over the past several years.
- 4.47 In relation to top-up food shopping trips, the same picture emerges again with Zone 4 comprising the primary catchment and Zone 3 comprising the secondary catchment. Table 4.11 indicates that, in

2013, Paignton town centre attracted around one third of all first choice top-up food shopping trips from Zone 4 residents, although this has fallen to 18% in the 2022 household survey. There has also been a drop, albeit smaller, in second choice top-up food shopping trips between 2013 and 2022. The secondary catchment of Paignton town centre amongst Zone 3 residents is much weaker and has not altered significantly over the past several years.

4.48 Table 4.12 below outlines the market share of Paignton town centre across the various types of comparison goods categories, across each of the study area zones. The data has been taken from the quantitative need assessments informing the 2013 and 2022 retail studies and has been split into first and second choice shopping destinations.

Table 4.12: first and second choice comparison goods market shares associated with Paignton town centre (2013 and 2022 retail studies)

CENTRE	First Choice Destination							Second Choice Destination						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
2013 Retail Study														
Clothes / footwear	4%	9%	12%	1%	0%	0%	0%	2%	8%	11%	2%	0%	0%	0%
Furniture / floorcoverings / textiles	3%	8%	15%	2%	0%	2%	0%	3%	15%	6%	2%	0%	0%	0%
DIY goods	4%	1%	10%	1%	0%	0%	0%	6%	3%	13%	1%	0%	0%	0%
Domestic appliances	1%	5%	15%	1%	1%	0%	0%	2%	4%	8%	0%	0%	0%	0%
Small electrical goods	3%	3%	17%	1%	0%	0%	0%	0%	2%	7%	0%	0%	0%	0%
Personal / luxury goods	4%	6%	47%	1%	0%	1%	0%	0%	8%	26%	0%	0%	0%	0%
Recreational goods	3%	9%	25%	1%	0%	0%	0%	0%	8%	15%	3%	0%	0%	0%
2022 Retail Study														
Clothes / footwear	0%	15%	15%	1%	0%	0%	0%	4%	10%	14%	1%	0%	0%	0%
Furniture / floorcoverings / textiles	1%	9%	17%	1%	0%	0%	0%	4%	9%	5%	2%	0%	0%	0%
DIY goods	0%	3%	3%	1%	0%	0%	0%	0%	0%	3%	0%	0%	0%	0%
Domestic appliances	2%	10%	12%	1%	0%	0%	0%	0%	0%	11%	0%	0%	0%	0%
Small electrical goods	0%	6%	3%	0%	0%	0%	0%	0%	7%	2%	3%	0%	0%	0%
Personal / luxury goods	3%	8%	35%	2%	0%	0%	0%	3%	15%	21%	0%	0%	0%	0%
Recreational goods	9%	5%	39%	1%	0%	0%	0%	0%	14%	32%	0%	0%	0%	0%

4.49 The above data in Table 4.12 provides the following key messages:

- The market shares indicate a catchment which can be divided into primary, secondary and tertiary areas. Zone 4 comprises the primary catchment across most but not all of the study area zones. Zone 2 comprises the secondary catchment, followed by a tertiary catchment in Zone 2.

- Within Zone 4, the town centre has seen a mixed picture in terms of market penetration rates which has it been able to achieve. There has been increases in market share in clothes/footwear, DIY and recreational goods, whilst trips associated with furniture and domestic appliances has remains reasonably static. There has been a fall in market share in personal and luxury goods (including health and beauty items) although, at 35% in 2022, this sector remains the most popular comparison goods sector in Paignton town centre.
- A similar picture emerges in relation to the secondary catchment in Zone 3, with small changes in market share across a number of categories (although the variances between 2013 and 2022 are less pronounced).
- Within the tertiary catchment (Zone 2) the low market share levels in 2013 have generally reduced to even (slightly) lower levels, apart from recreational goods shopping.

4.50 Building upon the analysis of market share data, we have also assessed the changes in retail turnover in Paignton town centre over the past decade, using our quantitative need assessment contained later in this document. This data shows that, since the 2013 retail study, there has been a circa -16% drop in convenience goods turnover and an increase of around one third in comparison goods turnover levels.

4.51 In relation to visits to food and beverage facilities, Paignton attracts 8% from Zone 3 residents, 45% from Zone 4, and 4% from Zone 5.

4.52 With regards to the usage of Paignton town centre, questions 29-42 provide the following information:

- Of those survey respondents in Zone 4 who visited Paignton town centre, 35% visited at least once a week²³.
- in terms of frequency of visits to the town centre, respondents were also asked whether the recent COVID-19 pandemic has influenced their behaviour towards the centre. 63% of respondents indicated that the pandemic had not changed the frequency of visits to the town centre, although 29% of respondents indicated that they were visiting less often. The reasons for this were varied and similar to those given for Torquay – i.e. safety concerns, the closure of shops over the last two years and the resultant range of shops. In addition, the propensity to undertake more online shopping was also a popular reason.
- In relation to the facilities which are visited on trips to Paignton town centre, circa 40% of respondents from Zone 4 indicated that they used the town centre for non-food shopping. This is, much lower than Torquay and similar to the level found in Brixham. Other popular reasons for visiting the town centre include top-up food shopping (21%), window shopping/browsing (15%), main food shopping (10%), eating out (17%) and financial services (23%). The visitation rate for top-food shopping is higher than Torbay but lower than Brixham.
- The most popular times of the day to visit Paignton town centre are between 6am and noon (53%), followed by noon – 3pm (28%).
- 58% of survey respondents travel to Paignton town centre by car, with 30% walking to the centre and only 4% using the bus.
- With regards to overall visits to Paignton town centre, 15% of Zone 4 residents indicated that they never visit the centre, with the main reasons cited for not visiting being: range of shops (40%), safety (10%), not enough clothes shops (10%), cleanliness of the public realm (19%), poor quality of shops (10%), along with the need for improvements to the centre (12%).
- For those survey respondents not visiting Paignton town centre, the most popular alternative destinations were Torquay (14%), the Willows district centre (38%) (including Wren Retail Park),

²³ which can be compared with 21% for Torquay and 61% for Brixham

Plymouth (5%) and Exeter (5%). The main reasons given for visiting these other centres were: better choice of non-food shops (63%), easiness of parking (20%), a more attractive environment (20%), quality of shops (11%) and levels of facilities / service (11%).

4.53 In light of the foregoing analysis, the following conclusions can be reach regarding Paignton town centre:

- Paignton town centre mirrors the trends seen in Torquay town centre, with a growing number of convenience goods and service outlets and a falling number of comparison goods outlets. However, the latest land use survey of the town centre does indicate that, despite these changes, the proportions of these use are similar to their respective national averages.
- Vacancies have continued to rise and remain slightly above the national average.
- The market share of the town centre for convenience goods shopping has fallen since the previous retail study, which is considered to be unsurprising given the opening of new out of centre and local / neighbourhood centre stores in the western part of the town. This has resulted in a fall in convenience goods expenditure being attracted to the town centre.
- In relation to comparison goods, there have been changes in the town centre's market share and the picture has been mixed. However, the turnover of the town centre has, since the previous retail study, increased by around one third.

Brixham Town Centre

4.54 Brixham town centre is the smallest of the three town centres in Torbay and the most southerly. Like the other two main town centres, Brixham's town centre is located adjacent to the seafront and arranged around a historic harbour area. The development plan policies map policies map provides the following designations for Brixham town centre:

- Town centre. The plan contained at Appendix XI shows the extent of the defined town centre boundary, which includes the western and northern sides of the harbour, plus Fore Street, Middle Street, Market Street and the northern end of Bolton Street.
- Primary shopping area (Appendix XII). The defined primary shopping area is broadly rectangular in shape and borders Middle Street (excluding buildings on the northern side of this highway), the western side of Pump Street, both sides of Fore Street, plus Market Street.
- Primary shopping frontage. The plan at Appendix XIII shows the primary shopping frontage extending along both sides of the majority Fore Street²⁴.
- Secondary shopping frontage (Appendix XIII). The defined secondary shopping frontage includes the junction around Market Street, Bolton Street and New Road, plus the eastern end of Middle Street (close to the harbour), the western side of The Strand and the far eastern part of Fore Street.

4.55 Table 4.13 below outlines the land use profile of Brixham town centre based upon the data contained within TC's 2021 Retail Monitor. As described above, the raw Retail Monitor data has been summarised into the convenience, comparison and service categories using Experian's 'centre report' classification.

²⁴ apart from its eastern end, close to the harbour area

Table 4.13: Brixham town centre land use profile – Torbay Council 2021 Retail Monitor Data

Sector	No. of Units	% of Total Surveyed Units
Convenience	20	12.0%
Comparison	71	42.5%
Service	62	37.1%
Other	0	0.0%
Vacant	14	8.4%
Total	167	100%

Source: Torbay Council Retail Monitor 2021

- 4.56 When considering the above data, it should be noted that the number of retail units counted for the purpose of this exercise in 2022 (167) are lower than the 241 in 2013. Taking this into account, the largest sector is the comparison goods retail sector, occupying 42.5% of all classified units. The second largest category is the service retail sector, occupying 37% of all classified units. The split between comparison and service retail sectors has been reversed since the 2013 retail study, with these two sectors now occupying four-fifths of all classified units.
- 4.57 At the time of the 2021 Retail Monitor, there were 20 convenience goods units in the town centre, which is equivalent to 12% of all classified units. This is very similar to the level observed in the 2013 retail study. The proportion of classified vacant retail units in the town centre is circa 8%, which matches the level observed in 2013.
- 4.58 Table 4.14 below provides the latest Experian GOAD land use data for Brixham town centre and compares it against the Experian data contained within Section 3 of the 2013 retail study. The table shows that there has been little movement in the number of convenience goods retailers in the town centre and now occupy 10.8% of all surveyed units. This is commensurate with the current national average.

Table 4.14: Brixham town centre land use profile – Experian GOAD data

Sector	August 2006			October 2009			April 2012			December 2021		
	No.	%	GB Ave %	No	%	GB Ave %	No	%	GB Ave %	No	%	GB Ave %
Convenience	21	10.9	9.2	25	13.3	9.3	18	9.6	8.7	19	10.8	10.2
Comparison	96	50.0	45.7	83	44.1	41.8	86	46.0	41.2	76	43.2	34.1
Service	62	32.3	33.1	58	30.9	34.7	63	33.7	36.3	66	37.5	39.5
Other	2	1.0	1.3	2	1.1	1.2	1	0.5	1.2	1	0.6	1.0
Vacant	11	5.7	10.7	20	10.6	13.0	19	10.2	12.6	14	8.0	15.2
Total	192	100	100	188	100	100	187	100	100	176	100	100

Source: Experian GOAD

- 4.59 The number of comparison goods retailers in town centre has continued to decline, after a period of no movement between 2009 and 2012. There were 76 comparison goods retailers in the town centre at the time of the most recent survey, which is equivalent to 43% of all surveyed units and well above the current national average of 34%. Since 2006 it is to be noted that there have been falls in both the number/proportion of comparison goods retailers in Brixham town centre and the proportionate national average, with, between 2006 and 2012, the proportion of comparison goods retailers slightly above the national average. However, the difference between both proportions has grown between 2012 and 2021 and now stands at nine percentage points.

- 4.60 The number of retail service uses has not changed by a significant amount between 2006 and 2022, with an increase of 4 units since 2006 and 3 units since 2012. The proportion of retail service uses in the town centre remains slightly below the national average but not by a substantial amount.
- 4.61 As can be seen in Table 4.14 there was a notable increase in the number of vacant retail properties between 2006 and 2009/2012, although throughout that period the proportion of has remained below the national average. Since 2012 the number of vacancies in the town centre has fallen to 14 units, which is equivalent to 8% of all surveyed units and although half the national average for town centre vacancies.
- 4.62 The latest Experian GOAD survey data also provides an estimate of the ground floor floorspace for each of the main land use categories and this is shown in Table 4.15 below. It indicates that the proportion of floorspace devoted to comparison goods and service retail uses comprises three-quarters of all surveyed floorspace (75.8%) which is above the combined national average floorspace of 64.4%. The proportion of floorspace occupied by convenience goods retail uses is below the national average, which is also true for the amount of vacant floorspace²⁵.

Table 4.15: Brixham town centre floorspace profile

Sector	Floorspace (sq m gross ground floor)	% of Total Surveyed Floorspace	National Average (%)
Convenience	3,177	15.7%	18.8%
Comparison	8,696	43.1%	38.7%
Service	6,605	32.7%	25.7%
Other	28	0.1%	0.7%
Vacant	1,672	8.3%	16.1%
Total	20,178	100%	100%

Source: Experian GOAD

- 4.63 The 2022 household survey provides the following market share information for main and top-up convenience goods shopping trips associated with Brixham town centre:

Table 4.16: first and second choice main food shopping market shares associated with Brixham town centre (2013 and 2022 retail studies)

CENTRE	First Choice Main Food							Second Choice Main Food						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
2013 Retail Study														
Brixham town centre	0%	13%	0%	0%	0%	0%	0%	0%	20%	0%	0%	0%	0%	0%
2022 Retail Study														
Brixham town centre	0%	10%	0%	0%	0%	0%	0%	0%	23%	0%	0%	0%	0%	0%

²⁵ which is around half the national average

Table 4.17: first and second choice top-up food shopping market shares associated with Brixham town centre (2013 and 2022 retail studies)

CENTRE	First Choice Top-Up Food							Second Choice Top-Up Food						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
2013 Retail Study														
Brixham town centre	0%	35%	0%	0%	0%	0%	0%	0%	51%	2%	0%	0%	0%	0%
2022 Retail Study														
Brixham town centre	0%	39%	0.4%	0.4%	0%	0%	0%	0%	18%	0%	0%	0%	0%	0%

- 4.64 The summary data contained in Tables 4.16 and 4.17 shows that Brixham town centre has a main and top-up food shopping catchment which is confined to Zone 3 only. Due to the size of the stores present in the town centre, it is unsurprising that the town centre's top-up food market share is higher than main food, with Table 4.17 above indicating that around one third of all first choice top-up food shopping trips from Zone 3 residents are attracted to the centre. The (first choice) proportion at 2022 is 39%, which is a small increase in the 35% share used in the 2013 retail study. However, the share of second choice trips has fallen from 51% in 2013 to 18% in 2022.
- 4.65 For main food shopping, the market share levels for both first choice and second choice trips amongst Zone 3 residents have not altered significantly between 2013 and 2022. The proportion of first choice trips amongst Zone 3 residents has fallen from 13% to 10%, whilst there has been a small increase from 20% to 23% for second choice main food trips.
- 4.66 Table 4.18 below conducts a similar exercise for comparison goods trips / market share levels (by zone) for Brixham town centre between the 2013 and 2022 data.

Table 4.18: first and second choice comparison goods market shares associated with Brixham town centre (2013 and 2022 retail studies)

CENTRE	First Choice Destination							Second Choice Destination						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
2013 Retail Study														
Clothes / footwear	0%	4%	0%	0%	0%	0%	0%	0%	5%	0%	0%	0%	0%	0%
Furniture / floorcoverings / textiles	0%	22%	0%	0%	0%	0%	0%	0%	8%	0%	0%	0%	0%	0%
DIY goods	0%	17%	0%	0%	0%	0%	0%	2%	22%	0%	0%	0%	0%	0%
Domestic appliances	0%	41%	0%	0%	0%	0%	0%	0%	16%	0%	0%	0%	0%	0%
Small electrical goods	0%	42%	1%	0%	0%	0%	0%	0%	15%	0%	0%	3%	0%	0%
Personal / luxury goods	0%	46%	0%	0%	0%	0%	0%	0%	16%	0%	0%	0%	0%	0%
Recreational goods	0%	7%	0%	0%	0%	0%	0%	0%	12%	0%	0%	0%	0%	0%
2022 Retail Study														
Clothes / footwear	0%	10%	0%	0%	0%	0%	0%	0%	9%	1%	0%	0%	0%	0%
Furniture / floorcoverings / textiles	0%	29%	1%	0%	0%	0%	0%	0%	16%	0%	0%	0%	0%	0%
DIY goods	1%	30%	0%	0%	0%	0%	0%	0%	26%	0%	0%	0%	0%	0%
Domestic appliances	0%	1%	0%	0%	0%	0%	0%	0%	6%	0%	0%	0%	0%	0%
Small electrical goods	0%	8%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Personal / luxury goods	0%	48%	0%	0%	0%	0%	0%	0%	10%	0%	0%	0%	0%	0%
Recreational goods	0%	31%	0%	0%	0%	0%	0%	0%	27%	0%	0%	0%	0%	0%

4.67 The market share data also indicates a comparison goods catchment area which is largely confined to Zone 3 of the study area. The 2022 household survey data indicates that the highest market share is in the personal and luxury goods category (which includes health and beauty goods), at 48% of first choice trips from Zone 3 residents. This is broadly similar to the equivalent type of trip adopted for the purposes of the 2013 retail study, although the share of second choice trips for this category amongst Zone 3 residents has fallen slightly (from 16% to 10%) between 2013 and 2022.

4.68 The next most popular categories for first choice comparison goods shopping trips to Brixham town centre (from Zone 3 residents) are: DIY goods (30%), recreational goods (31%) and furniture / household textiles (29%). Table 4.18 indicates that the (first choice) market share in these categories has grown since the comparable data used in the 2013 retail study. This is also true for second choice trips amongst Zone 3 residents in these categories. In relation to other categories, the first choice market share of clothing/footwear shopping trips to the town centre has increased slightly, whilst the centre's share of trips associated with domestic appliances and smaller electrical goods has decreased.

- 4.69 In relation to visits to food and beverage facilities in Brixham town centre, the results of the household survey indicate that it only attracts a material amount of visits from Zone 3 of the study area (the zone in which Brixham sits) with a 68% market share.
- 4.70 The 2022 household survey provides the following data regarding the usage of Brixham town centre:
- In relation to the frequency of visits to the town centre, Brixham scores the highest out of the three main centres in Torbay with circa 60% of Zone 3 residents visiting the centre at least once a week. This is twice the level of Paignton and three times the level of Torquay. This suggests that Brixham is very much a local shopping and service destination which is able to serve a reasonable amount of day to day needs of the local population and is able to combine this role successfully with its long-standing visitor/tourism role.
 - The level of visits to Brixham town centre has been least affected by the Covid-19 pandemic when compared with the other two main town centres. 72% of Zone 3 residents responding to the 2022 household survey indicated that there had been no change, which can be compared with 61%-63% for Paignton and Torquay.
 - In relation to the reasons for visiting the town centre, non-food shopping is the most popular reason (like the other two main town centres). However, there are some noticeable differences from the other two centres, including, for example, a much higher level of top-up food shopping, eating out, and strolling around the centre. In contrast, there are much lower levels of visits for financial services (which is a reflection of the low level of facilities present).
 - The timing of visits to Brixham town centre is very similar to that of Paignton with 58% of visits taking place in the morning and 23% in the early afternoon (12noon – 3pm).
 - Mode of travel to Brixham town centre is noticeably different to the other two main town centres, with the lowest level of travel by car (circa 40%, when compared with circa 60% for Paignton and Torquay). In contrast, 45% of Zone 3 residents walk to the town centre, which can be compared with 30% in Paignton and 26% in Torquay. This latter difference may be explained by the respective size of the three settlements and how people use the centre (i.e. as, in Brixham's case, a day to day retail/service destination).
 - Of those local residents (in Zone 3) who don't visit the town centre, the main reasons given were: the range and quality of shops, health reasons, and the lack of car parking. Within this group of people, the alternative destinations visited were split evenly between Paignton, The Willows district centre, Plymouth, and Torquay town centre. Reasons associated with car parking would appear to be the main reasons for visiting these alternative destinations, followed by choice of non-food shops.
- 4.71 With regards to the foregoing analysis, the following conclusions can be drawn in relation to Brixham town centre:
- The town centre has a small comparison goods shopping catchment which is largely confined to the local area, which is also true for convenience goods shopping. The centre has a largely top-up food shopping role which has not changed in recent years.
 - The land use profile of the centre has not seen any significant changes in recent years, apart from a fall in the number of comparison goods retail outlets (although the proportion of these uses remains above the national average).
 - Vacancies in the town centre have fallen since the previous retail study and are now around half of the national average.
 - The centre has a small but strong catchment for food and beverage visits from the local community, attracting around two-thirds of all trips from Brixham residents.

The Willows District Centre

- 4.72 The Willows district centre has, for a number of years, had an important and growing influence on shopping provision in Torquay, Torbay and the surrounding South Devon area. Originally envisaged as a smaller local type centre, The Willows has been developed on a much larger scale, containing large Sainsburys and Marks & Spencer stores, along with Wren Retail Park. As will be described below, the district centre has a considerable influence over food and non-food shopping patterns in the Torbay and surrounding area and has led to TC devising a unique planning policy approach for the centre.
- 4.73 The plan at Appendix XIV to this report shows the extent of the district centre boundary at The Willows, annotated as TC2.2.1. It covers the Sainsburys and Marks & Spencer stores, Wren Retail Park and also a DFS furniture store, all of which is bounded by Browns Bridge Road and Riviera Way. The Retail Park contains four units, three of which are currently occupied by Next, Boots and Home Bargains.
- 4.74 There is a distinct change in levels between the Sainsburys/M&S/DFS area and Wren Retail Park, with no physical / direct connection, which leads to a disjointed feel for the overall existing district centre boundary.
- 4.75 The plan at Appendix XIV also indicates an immediately adjacent neighbourhood centre (Condor Drive)²⁶, separated from the district centre by Browns Bridge Road, and containing a public house, church, two take-aways, a veterinary surgery, opticians and a hair salon.
- 4.76 Table 4.4 earlier in this section outlines the main food market shares associated with The Willows district centre, taken from the 2022 household survey and the 2013 retail study. It shows that the district centre has an influence in main food shopping patterns across the whole of the study, albeit at a modest level for Zones 3, 6, 7 and 8, with a slightly higher level of first choice trips in Zone 4. A similar pattern occurs in relation to second choice main food trips, although the market share levels are generally higher for Zones 4 and 8.
- 4.77 Unsurprisingly, the primary catchment for The Willows is Zone 5 of the study area where, as Table 4.4 shows, the centre has a significant influence over main food shopping trips. However, whilst the market share of the district centre in relation to second choice main food trips has not altered significantly between the 2013 and 2022 studies, Table 4.4 indicates that there has been a significant fall in the first choice main food shopping trip market share of the centre since the 2013 retail study. The most likely reason for this change is due to the increasing level of competition since the time of the previous household survey, particularly the ASDA in Torquay and, to a lesser extent, the ALDI store on Brixham Road in Paignton. The 2013 retail study used a first choice main food market share of 53%, although this has now fallen, by circa 50%, to 27% amongst Zone 5 residents. As noted above, the market share of The Willows for second choice has not materially changed over the past decade, with the district centre attracting around one third of trips from Zone 5 residents.
- 4.78 In relation to top-up food shopping Table 4.5 earlier in this section shows that the catchment of The Willows is unsurprisingly more constrained than main food shopping with only limited amounts of trade being drawn from Zone 5 residents. Beyond Zone 5 a small amount of first choice main food trips are attracted from Zones 3 (Brixham) and 4 (Paignton), whilst a small amount of second choice top-up trips are attracted from these zones plus Zones 2, 6 and 8. All of these market shares would suggest that, in combination, The Willows is not a particularly popular regular top-up food shopping

²⁶ annotated as TC2.4.3

destination for people living outside of Torbay but popularity may increase slightly possibly in combination with other irregular trips to Torbay for other purposes.

4.79 Table 4.19 summarises the comparison goods market share levels for The Willows taken from the previous and current household survey information.

Table 4.19: first and second choice comparison goods market shares associated with The Willows district centre (2013 and 2022 retail studies)

CENTRE	First Choice Destination							Second Choice Destination						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
2013 Retail Study														
Clothes / footwear	8%	30%	28%	18%	9%	7%	13%	6%	9%	18%	21%	11%	7%	12%
Furniture / floorcoverings / textiles	8%	30%	28%	18%	9%	7%	13%	6%	9%	18%	21%	11%	7%	12%
DIY goods	0%	0%	1%	0%	0%	0%	0%	2%	0%	0%	0%	0%	0%	0%
Domestic appliances	21%	24%	40%	51%	32%	10%	22%	16%	34%	35%	27%	18%	14%	16%
Small electrical goods	26%	25%	38%	54%	35%	14%	26%	18%	20%	26%	13%	7%	14%	16%
Personal / luxury goods	6%	8%	12%	12%	3%	3%	3%	3%	8%	10%	13%	5%	0%	0%
Recreational goods	0%	9%	3%	0%	2%	0%	0%	0%	4%	0%	0%	0%	0%	0%
2022 Retail Study														
Clothes / footwear	14%	35%	29%	33%	4%	16%	10%	6%	30%	28%	26%	16%	17%	18%
Furniture / floorcoverings / textiles	3%	8%	20%	17%	14%	6%	1%	12%	7%	12%	21%	11%	3%	7%
DIY goods	1%	1%	0%	0%	3%	0%	0%	0%	0%	0%	1%	0%	3%	0%
Domestic appliances	6%	2%	4%	14%	4%	0%	3%	0%	0%	5%	31%	5%	0%	0%
Small electrical goods	0%	0%	6%	14%	9%	0%	4%	0%	0%	26%	12%	16%	0%	5%
Personal / luxury goods	6%	6%	27%	43%	3%	3%	6%	2%	12%	26%	29%	3%	15%	2%
Recreational goods	0%	3%	2%	16%	0%	0%	0%	0%	0%	3%	5%	0%	0%	3%

4.80 The data in Table 4.19 provides confirmation that whilst many of The Willows' highest market shares lie amongst trips from Zone 5 residents, there is a catchment for the centre which extends beyond Torbay and, in some cases, beyond Torbay itself. Personal / luxury goods (43%) and clothing/footwear (33%) have the highest market shares in relation to first choice trips, followed by recreational goods, furniture/textiles, domestic appliances and smaller electrical products. Amongst those first choice comparison goods trips (from Zone 5 residents) directed towards the district centre, there have been increases in the clothing/footwear and personal/luxury goods category and falls in the domestic/electrical goods categories. In relation to the latter categories, the main reason for the significant fall in market share is likely to be due to the closure of the Comet electrical goods store, which was open at the time of the household survey used in the 2013 retail study.

- 4.81 Beyond Torquay (Zone 5) there has been a general softening in the first choice market share levels within other study area zones, although market share levels for clothing and personal/luxury trips amongst Zone 4 (Paignton) residents have remained relatively static over the past decade. The opposite is true for second choice comparison goods trips in these categories amongst Paignton and Brixham residents.
- 4.82 In relation to food and beverage visits, The Willows attracts 2% of trips apiece from residents of Zones 4, 5 and 8.

St Marychurch District Centre

- 4.83 St Marychurch district centre is located in the northern part of the Torquay urban area and comprises a linear centre²⁷ located on either side of Fore Street, stretching from St Marychurch Road in the south-east to the junction with Church Road in the north-west.
- 4.84 Table 4.20 below outlines the land use profile of the district centre based upon the 2021 Retail Monitor database held by TC. As with the three main town centres, the Retail Monitor data has been classified using Experian's 'centre report' methodology. The data indicates that the comparison goods retail and retail service sectors have the same number of surveyed units (28) and comprise circa 39% of all units apiece. Convenience goods retailers occupy 15% of all surveyed units, whilst, at the time of the survey, only four retail units in the centre were vacant.

Table 4.20: St Marychurch district centre land use profile – Torbay Council 2021 Retail Monitor Data

Sector	No. of Units	% of Total Surveyed Units
Convenience	11	15.5%
Comparison	28	39.4%
Service	28	39.4%
Other	1	1.4%
Vacant	3	4.2%
Total	71	100.0%

Source: Torbay Council Retail Monitor 2021

- 4.85 Table 4.21 below provides the equivalent data for the district centre taken from the Experian GOAD land use database. The latest Experian survey was undertaken in June 2021. Land use data for St Marychurch district centre was not included in the 2011 and 2013 retail study documents for TC and therefore we have obtained historic data for the centre from Experian's database and this is shown in Table 4.21 below.

²⁷ See Appendix XV

Table 4.21: St Marychurch district centre land use profile – Experian GOAD data

Sector	May 2008			July 2012			June 2021		
	No	%	GB Ave %	No	%	GB Ave %	No	%	GB Ave %
Convenience	11	15.1	9.3	12	16.2	8.7	11	14.1	10.2
Comparison	29	39.7	41.8	28	37.8	41.2	26	33.3	34.1
Service	30	41.1	34.7	29	39.2	36.3	33	42.3	39.4
Other	1	1.4	1.2	1	1.4	1.2	1	1.3	1.0
Vacant	2	2.7	13.0	4	5.4	12.6	7	9.0	15.2
Total	73	100	100	74	100	100	78	100	100

Source: Experian GOAD

- 4.86 The above data shows that there has been a small increase in the number of surveyed units in the district centre between 2008 and 2021 (from 73 to 78) which indicates the continued popularity of St Marychurch as a retail destination for the local community. Convenience goods retail uses have remained generally static over the past decade, occupying a proportion of units which has been consistently above the national average.
- 4.87 There has been a small fall in the number of comparison goods retailers in the district centre between 2012 and 2021, with a corresponding fall in the proportion of units in this category. The fall mirrors the national trend, with 33% of units currently in comparison goods use against a national average of 34%. Conversely, retail service uses have increased slightly since 2012, from 29 units to 33 units in 2021. This category remains slightly above the national average. Finally, the number of vacant retail units in St Marychurch district centre has been consistently low since 2008 and below the respective national average. Vacancies have risen in recent years and, at the time of the 2021 Experian survey, comprised 7 units in the centre.
- 4.88 Table 4.4 earlier in this section outlines the market share of St Marychurch district centre in relation to first and second choice main food shopping trips across the study area. This indicates a limited catchment which has a 1% share of first choice trips in Zones 4 (Paignton) and 5 (Torquay) and a similar market penetration level for second choice main food trips. It will be noted that the district centre's share of first choice main food trips has fallen slightly since the data used in the 2013 retail study, albeit the market share was only 3% previously.
- 4.89 For top-up food shopping Table 4.5 shows that the catchment of the district centre is limited to Zone 5 (save for a small share of trips in Zone 7), with the available data showing that the centre currently attracts 6% of first choice top-up food trips and 12% of second choice top-up trips. Both of these levels are small increases over the market share levels used in the 2013 retail study.
- 4.90 In relation to comparison goods shopping, Table 6 at Appendix XVII, which informs the quantitative assessment of 'need' indicates that St Marychurch district centre does not feature as attracting any noticeable market share in many categories. The only ones which register a market share amongst Zone 5 residents are:
- 0.8% of first choice health and beauty trips;
 - 5.1% of first choice recreational goods trips; and
 - 5.7% of second choice recreational goods trips.
- 4.91 In relation to food and beverage visits, St Marychurch attracts a market share of 1% from Zone 4 residents, 4% from Zone 5 residents and 2% from Zone 6 residents.

Preston District Centre

- 4.92 The final centre subject to our health check review is Preston district centre in Paignton. The district centre lies to the north of Paignton town centre and is location on the main vehicular route linking Paignton to Torquay. The development plan policies map provides a single boundary definition for the centre (see plan at Appendix XVI), which extends along both sides of Torquay Road from the junction with Orient Road in the north to Brookfield Close in the south.
- 4.93 Table 4.22 below outlines the land use composition of the district centre using data taken from TC's 2021 Retail Monitor which has been classified using Experian GOAD's 'centre report' definitions. It indicates a small number of convenience goods retailers in the centre (circa 5% of all surveyed units), along with a broadly equal split between comparison goods retail and retail service uses. (39% and 44% respectively). At the time of the survey there were 7 vacant retail units in the district centre which is equivalent to circa 11% of all surveyed retail units.

Table 4.22: Preston district centre land use profile – Torbay Council 2021 Retail Monitor Data

Sector	No. of Units	% of Total Surveyed Units
Convenience	3	4.7%
Comparison	25	39.1%
Service	28	43.8%
Other	1	1.6%
Vacant	7	10.9%
Total	64	100.0%

Source: Torbay Council Retail Monitor 2021

- 4.94 Unlike the main town centres and other district centres in Torbay, Experian GOAD do not undertake a regular land use survey of Preston district centre.
- 4.95 Tables 4.10 and 4.11 earlier in this section outline the market share levels for main and top-up food shopping trips associated with Preston district centre. They indicate a catchment which encompasses, to varying extents, Zones 3, 4 and 5 of the study area with Zone 4 being the primary catchment for top-up food shopping but Zones 3 and 4 contributing relatively equally to main food shopping visits. The data in these tables indicates that:
- The centre's share of first choice main food trips amongst Zone 4 (Paignton) residents has fallen from 6% to 4% over the past decade, whilst the share of similar trips from Zone 3 (Brixham) residents has increased from 4% to 7%. A similar trend can also be seen in relation to second choice main food trips, with a fall in Zone 4 from 9% to 4% and a slight increase in Zone 3 from 4% to 5%.
 - The district centre's market share for top-up food shopping trips is unsurprisingly higher given the small size of convenience goods stores in the centre. The centre currently attracts 16% of first choice top-up trips from Zone 4 residents, which is a small decrease from the 19% adopted for the 2013 retail study. The share of second choice top-up food trips from Zone 4 residents is higher at 19% (and which is also a slight decrease from the 23% level used in the 2013 retail study). Zone 4 residents contribute the majority of top-up food shopping trips to Preston district centre, with only 2% of first choice and 5% of second choice trips being derived from Zone 3 residents.
- 4.96 In relation to food and beverage visits associated with Preston district centre, these are confined to Zone 4 residents, where the centre has a 3% market share.

5. Assessment of Need

Introduction

- 5.1 Within previous retail and town centre studies produced for TC, assessments of 'need' have focused upon quantitative and qualitative indicators. The reasons for doing so were based upon national planning practice guidance in force at that time and long-standing good/best practice. Specific references to quantitative and qualitative indicators have been removed from the most recent versions of the NPPF, although we consider that it remains useful and best practice to consider both indicators in order to provide a rounded picture of retail floorspace provision. Therefore, each indicator is discussed, in relation to convenience and comparison goods retail floorspace provision, in turn below.

Quantitative Need Assessment – Retail Floorspace

- 5.2 The most recent assessment of quantitative retail floorspace need in Torbay was undertaken in the 2013 retail study. That assessment provided individual forecasts for convenience and comparison goods floorspace in the three main settlements (Torquay, Paignton and Brixham). The period of assessment stretched from 2013 to 2031, with interim forecasts provided for 2016 and 2021.
- 5.3 For the purposes of this current study, it has been agreed that the 2013 retail study quantitative need forecasts would be updated using: (A) the latest available retail expenditure forecasts; and (B) informed by new empirical research. This sub-section outlines the various data sources and assumptions which have been adopted in order to prepare our quantitative need forecasts.
- 5.4 Quantitative need is conventionally measured as expenditure capacity, i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area. Expenditure capacity, or 'quantitative need' can arise as a result of forecast expenditure growth (either through population growth or increases in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area.
- 5.5 Quantitative capacity forecasts are reliant on a series of data sources which are regularly updated in response to various factors including UK economic forecasts and the performance of retailers. The section covers the following areas:
- Study area
 - Population data
 - Per capita retail expenditure forecasts
 - Data on shopping patterns for convenience and comparison goods shopping
 - Commitments for retail floorspace
 - Floorspace efficiency levels
 - Benchmark turnover levels of existing and committed retail floorspace
 - The timeframe for the assessment and the use of the quantitative capacity forecasts
- 5.6 Given the scale of Torbay, along with its wider catchment, the study area for this assessment is required to be necessarily large. The study area will need to capture shopping patterns associated with each of the main town centres and the average spending levels of those people who use these centres. This requires the study area to extend beyond the Torbay administrative area in order that data on all relevant shopping patterns is gathered. A plan showing the extent of the study area and the constituent sub-zones is contained at Appendix I to this document.

- 5.7 The study area / household survey area covers the same geographic area as the exercise undertaken for the 2013 retail study. Like the 2013 study, the study area is based upon postcode sector areas.
- 5.8 As set out in Section 4 of this report, the 2022 household survey has been structured to collect data on the following convenience and comparison shopping activities:
- First choice and other main food shopping destinations
 - First choice and other top-up food shopping destinations
 - First and second choice destinations for the following types of comparison goods:
 - Clothing and fashion goods
 - Furniture, floorcoverings and household textiles
 - DIY goods
 - Domestic appliances
 - Smaller electrical goods
 - Health and beauty goods
 - Recreation and luxury goods
- 5.9 The results of the household survey have been weighted against the age profile of each individual zone and have been summarised in Table 4 at Appendix XVII (for convenience goods shopping) and Table 6 at Appendix II (for comparison goods shopping).
- 5.10 For the purposes of our assessment, and in order to provide consistency with the 2013 retail study assessment, 'don't know', internet/on-line, and 'don't do' responses have been removed from the results and the market share data re-based²⁸.
- 5.11 The timeframe for the new assessment extends from the year in which the town centre strategy document is intended to be published (2022) to 2040, with interim forecasts for 2027 and 2032.
- 5.12 The current version of the NPPF indicates that local authorities should:
- “allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead”²⁹. The PPG also notes, in relation to the preparation of town centre strategies, that “Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed”.*
- 5.13 Therefore, there is no compulsory requirement for this quantitative assessment to run all the way to 2040 although we have done so in order to provide some broad informal guidance, with 2022, 2027 and 2032 forecasts provided in order to meet NPPF policy and NPPG guidance.
- 5.14 However, it should be noted when absorbing the content of our quantitative assessment that the forecasts will become less reliable over time due to nature of the economic forecasts which will be influenced by external factors some of which will be unforeseen. As a consequence, we would recommend that the first five years of the assessment is the focus for the retail strategy (i.e. up to 2027).
- 5.15 In line with the approach taken in the 2013 retail study, our quantitative need assessment adopts **population forecasts** provided by Experian. Population levels for each of the study area zones are shown in Table 1 at Appendix XVII.

²⁸ i.e. the original percentage figures from the household survey results have been re-calculated in order to provide new percentage figures existing physical stores which exclude the influence of 'don't know', internet/on-line, and 'don't do' responses.

²⁹ our emphasis

- 5.16 New **per capita retail expenditure data** has been obtained from Experian³⁰. The data provided is set at a 2021 base level and has been projected forward based upon the forecast change in per capita retail expenditure for convenience and comparison goods is based upon advice within Experian's Retail Planner Briefing Note 19, published in January 2022. These latest forecasts take into account, at the time of finalising this report, the latest available data on the potential implications of the COVID-19 pandemic on the retail sector.
- 5.17 However, it should be noted that the Experian forecasts were published before Russia's invasion of Ukraine and the full extent of the effect of that war were forecast / understood. Moreover, the forecasts do not take into account the current worsening economic situation in the UK, Europe and, arguably, across the world as a consequence of the Ukraine war and its impact upon global fuel prices and inflationary pressures. As a consequence, the economic forecasts contained within this assessment should be used with some caution, given that it is currently unclear how long the short term pressures on inflation, interest rates and the 'cost of living' will continue beyond 2022 and 2023.
- 5.18 Per capita retail expenditure for convenience and comparison goods is shown in Tables 2a-2d at Appendix XVII for 2022, 2027, 2032 and 2040.
- 5.19 As noted above, the **current market share levels** shown in the 2022 baseline analysis are taken from the household survey commissioned for this Study (and conducted in early 2022). The data has been summarised to show the market share of the main stores and the town/district centres in each of the three settlements for first and second choice shopping destinations, along with a 'summary' total for other facilities in each settlement. This is shown in Table 4 for convenience goods shopping and Table 6 for comparison goods shopping.
- 5.20 The market share levels in Tables 4 and 6 are then translated into study area derived turnover levels by applying this data to available convenience and comparison goods expenditure (by category) in Table 3. This is contained in Tables 5a-5b for convenience goods and Tables 7a-7d for comparison goods. The same structure as Tables 4 and 6 is adopted in order to show the amount of expenditure which each destination gains from each of the study area zones and also first and second choice shopping trips.
- 5.21 As part of the assessment of future quantitative retail floorspace need it is important to include any significant **commitments**. Therefore, data on retail and other main town centre land use commitments has been provided by the Council. This data has been reviewed and we have incorporate the relevant floorspace commitments into the specific convenience and comparison goods floorspace assessments for each main settlement. The main commitments included in the assessment are:
- Kerswell Gardens, Torquay Gateway: 1,315sq m (net) convenience store, of which no more than 20% comparison goods (Aldi). Drive through coffee shop of 167sq m. Approved 10th February 2022. Site preparation works underway in September 2022.
 - Great Parks, Kings Ash Road, Paignton. 1,410sq m net trading area convenience store, and two smaller units of 87 sq m. Approved 2022 and under construction.
- 5.22 Within the 2013 retail study two different approaches were taken for **benchmark turnover levels** for the convenience and comparison goods assessments. For convenience goods floorspace, it is common for the benchmark turnover of a selection of existing floorspace to be calculated using the existing net floorspace and company average sales densities for individual national multiple retailers

³⁰ February 2022

and an assumed average for other convenience goods floorspace in defined 'town centres' and elsewhere. We remain with this approach in this assessment and have:

- updated the sales density information for named national multiple retailers using the latest research undertaken by Verdict and Mintel³¹; and
- including data on new store openings since the previous studies.

- 5.23 For the comparison goods assessment, the 2013 retail study adopted an approach which assumed that the supply and demand was in equilibrium at the base year for the assessment (i.e. the level of actual comparison goods turnover/expenditure attracted to each settlement was the same as the benchmark turnover at the base year)³². This is a common approach and is used, in our experience, in circumstances where there is a lack of data on exiting floorspace / average sales density figures and / or where this is not a recent (previous) quantitative assessment which uses broadly the same parameters as the latest study.
- 5.24 In this instance, the 2013 retail study does provide that link and therefore it is possible to undertake an assessment which continues to utilise the benchmark turnovers devised and agreed for the purposes of the 2013 study. However, as a sensitivity test, we have also undertaken an alternative assessment which adopts the same approach as the 2013 study – i.e. actual turnover equals benchmark turnover at the base year of 2022.
- 5.25 Finally, our convenience and comparison goods capacity assessments both make an allowance for changes in **floorspace efficiency** over the assessment period. The assumptions that have been made are taken from recommendations made by Experian in its Retail Planner Briefing Note (Note 19, January 2022).
- 5.26 Turning now to the assessment of future quantitative capacity for convenience and comparison goods floorspace in each of the three main settlements, it should be noted that the forecasts are based upon a constant market share across the assessment period, except for an initial adjustment in order to take into account the impact of commitments on existing shopping patterns. The main example of this is the committed Lidl store at Kings Ash Road in Paignton which is likely, in our opinion, to divert a modest amount of convenience goods expenditure to Paignton from existing stores in Torquay.
- 5.27 For the avoidance of doubt, the quantitative capacity forecasts outlined in this section are for the whole of each town, not just town centres and are cumulative in nature – i.e. the quantitative capacity of 2,386sq m net at 2032 for Torquay for convenience goods floorspace includes the 1,984sq m net capacity at 2027.
- 5.28 In addition, when forecasting future floorspace capacity, each element of the assessment at Appendix XVII adopts an indicative sales density in order to translate residual expenditure into a net sales area floorspace equivalent³³. The sales density figure for convenience goods floorspace is considered representative of the main national grocery operators, whilst the comparison goods sales density figure is placed at the higher end of store performance levels in order to take into account a wide range of types of operator and also to ensure that potential future net additional capacity is not over-estimated. However, the main guiding principle in this assessment is that the sales density figures are indicative and it will be important to: (A) re-visit the sales density levels as and when specific

³¹ Retail Rankings, 2021 edition and research from GlobalData provided in 2021.

³² for example, the actual comparison goods turnover of all stores in Sevenoaks at 2016 was £253m and this, therefore, was assumed to also be the benchmark turnover of those stores at the same year.

³³ In order to arrive at an indicative floorspace capacity figure the residual retail expenditure total is divided by the chosen indicative sales density to provide a floorspace equivalent.

proposals are considered; and (B) when/if there is a need to reduce future capacity levels as a consequence of further retail floorspace commitments then the likely turnover/sales density of those commitments is adopted (rather than the indicative density level).

- 5.29 As noted above, it should be noted that the results of the quantitative assessment represent only half of the overall assessment of need (with the other half being qualitative indicators). Moreover, in order to understand whether it is appropriate to use the results of the quantitative assessment to plan for new, replacement or changing levels of floorspace provision, it will be important to understand the key factors influencing the quantitative assessment. Therefore, any forecasts which show actual levels of current and future turnover diverting from benchmark turnover are referred to as a 'surplus' or 'deficit' which need to be understood along with the wider set of factors.
- 5.30 Before the results of the quantitative assessments are summarised, it is useful to, in our opinion, to compare the turnover and market share levels produced by this latest (2022) assessment with the findings of the previous quantitative assessment contained within the 2013 retail study. Table 5.1 below outlines the study area derived convenience goods turnover for each of the three main settlements, including the key destinations therein³⁴.

³⁴ In order to compare the two sets of turnover levels the 2013 retail study data, which was originally expressed in 2011 prices, has been converted to 2021 prices in order to match the data in the 2022 study assessment.

Table 5.1: comparison between convenience goods turnover levels across Torbay in the 2013 and 2022 quantitative assessments

Settlement / Destination	2013 Retail Study Turnover (2013 turnover level)	2022 Retail Study Turnover (2022 turnover level)	Difference (£m)	Difference (%)
TORQUAY				
Total	£166.2	£177.5	£11.3	7%
Town Centre	£17.7	£8.7	−£9.0	−51%
The Willows district centre	£86.6	£58.4	−£28.2	−33%
St Marychurch district centre	£4.1	£10.6	£6.5	160%
ASDA, Newton Road	£0.0	£35.0	-	-
Lidl, Newton Road	£21.7	£25.3	£3.6	17%
Local stores	£36.2	£39.5	£3.3	9%
PAIGNTON				
Total	£136.0	£153.3	£17.3	13%
Town Centre	£21.3	£17.8	−£3.5	−16%
Preston district centre	£12.9	£12.4	−£0.5	−4%
ASDA, Borough Close	£0.0	£13.5	-	-
Iceland, Devonshire Retail Park	£0.0	£4.8	-	-
Morrisons, Totnes Road	£55.7	£31.8	−£23.9	−43%
Sainsburys, Yalberton Road	£38.8	£27.3	−£11.5	−30%
Lidl, White Rock	£0.0	£16.7	-	-
ALDI, Brixham Road	£0.0	£21.0	-	-
Local stores	£7.3	£8.0	£0.7	10%
BRIXHAM				
Total	£15.9	£17.2	£1.3	8%
Town Centre	£9.9	£10.0	£0.1	1%
Other	£6.0	£7.2	£1.2	20%

Source: Table 5a, 2022 retail study & Table 5a, 2013 retail study

5.31 The contents of Table 5.1 provide the following information:

- It will be noted that there a number of new grocery stores in Torquay and Paignton which did not feature as part of the market share / quantitative assessment analysis in the 2013 retail study (although some were taken into account as commitments for the purposes of forecasting convenience goods floorspace capacity). The opening of these stores will have had an impact upon the trading levels observed as part of the 2013 retail study analysis. Overall, they are assessed to attract circa £90m of convenience goods expenditure from the study area and therefore the impact upon previously observed shopping patterns in the previous evidence base study is likely to be reasonably significant.
- When comparing the 2013 and 2022 turnover levels, it is important to acknowledge that the two assessments have been undertaken nine years apart and, within that time, available expenditure

levels may have changed, depending upon two factors. First, the 2013 retail study was forecasting that within the study area as a whole there could be growth of 3.7% in resident population levels between 2013 and 2021. Within the three Torbay zones, the forecast growth was +3.2% in Zone 3 (Brixham), +6.4% in Zone 4 (Paignton) and +3.4% in Zone 5 (Torquay). Second, in relation to per capita expenditure levels on convenience goods, the latest data from Experian³⁵ suggests that per capita expenditure levels did not grow over the same period and actually decreased by -0.2%. Nevertheless, increasing resident population levels will have increased available convenience goods expenditure and, therefore, leaving other matters to one side, stores and centres maintaining a constant market share should expect to see a modest increase in turnover.

- Within Torquay, Table 5.1 indicates that there has been a mixed picture of store / centre performance levels over the past decade:
 - The town centre and The Willows have lost a considerable amount of turnover, whilst St Marychurch district centre has seen a large increase in convenience goods turnover. There has also need an increase in the turnover of the out of centre Lidl store, which has long been a successful trading location.
 - One likely reason for the drop in the turnover of The Willows will be due to the opening of the ASDA supermarket on Newton Road. This store has now been open for several years and it has likely to have been successful due to the historic small number of large mainstream supermarkets in Torquay and the opportunities that this situation gave ASDA to obtain a good proportion of main and top-up food shopping trips in the local area.
 - Finally, it should be noted that there has been a small increase in turnover of small 'local' stores in Torquay, which is not dissimilar to the rise in available expenditure in the local area over the past decade.

- Within Paignton, Table 5.1 indicates that there has been a modest (+7%) increase in the turnover of convenience goods facilities between 2013 and 2022. This is broadly in line with the likely increase in available convenience goods turnover over the past decade, although beneath this 'headline' level there are some significant changes:
 - Since the completion of the household survey which was used to underpin the 2013 retail study analysis, there have been four notable new store openings: the Lidl and ALDI stores in new local/neighbourhood centres on the western edge of the town, the ASDA store in the former Focus DIY unit and an Iceland Food Warehouse at Devonshire Retail Park. Collectively, these stores have a study area derived convenience goods turnover of circa £56m.
 - The arrival of these stores has had a pronounced effect upon existing stores. The stores with the largest predicted fall in turnover are the out of centre Sainsburys and Morrisons stores, at -30% and -43% respectively. This is to be expected as they have the closest level of trading overlap with the recently opened stores. However, convenience goods stores in Paignton town centre are also forecast to have experienced a -16% fall in turnover, along with a -4% reduction in Preston district centre.

- There has been an 8% increase in the convenience goods turnover of stores in Brixham, which is influenced by a relatively static town centre turnover and a +20% increase in the turnover of local stores outside of the town centre.

5.32 A similar exercise is undertaken for comparison goods expenditure / turnover in each of the three main settlements in Table 5.2 below.

³⁵ contained within Retail Planner Briefing Note 19 (2022)

Table 5.2: comparison between comparison goods turnover levels across Torbay in the 2013 and 2022 quantitative assessments

Settlement / Destination	2013 Retail Study Turnover (2013 turnover level)	2022 Retail Study Turnover (2022 turnover level)	Difference (£m)	Difference (%)
TORQUAY				
Total	£305.6	£345.7	£40.1	13%
Town Centre	£159.6	£101.2	−£58.4	−37%
The Willows district centre	£84.8	£107.3	£22.5	26%
St Marychurch district centre	£1.7	£2.9	£1.2	74%
Out of centre retail warehouses	£57.5	£122.9	£65.4	114%
Local stores	£2.0	£11.4	£9.4	476%
PAIGNTON				
Total	£47.3	£87.5	£40.2	85%
Town Centre	£35.0	£46.5	£11.5	33%
Preston district centre	£1.0	£3.6	£2.6	245%
Out of centre retail warehouses	£11.3	£28.8	£17.5	156%
Local stores	£0.0	£8.6	£8.6	
BRIXHAM				
Total	£11.0	£17.6	£6.6	59%
Town Centre	£11.0	£16.2	£5.2	47%
Other	£0.0	£1.4	£1.4	

Source: Table 7a, 2022 retail study & Table 7a, 2013 retail study

5.33 The contents of Table 5.2 provide the following information:

- As a starting point it should be noted that the amount of available expenditure within the study area will have changed over the period between the 2013 and 2022 retail studies, based upon two factors: population change and changes in per capita retail expenditure levels. The level of population change has been discussed above, whilst Experian's Retail Planner Briefing Note 19 (2022) indicates that there was a circa +11.% increase in per capita comparison goods expenditure³⁶ levels between 2014 and 2022. As a consequence, it would be expected that, if shopping destinations were to retain broadly the same market share then turnover levels would increase.
- Table 5.2 indicates that there has been a +13% (£40m) increase in the overall (collective) turnover of comparison goods stores across Torquay. This is broadly in line with increases in available (non-internet) expenditure in the study area between 2014 and 2022, although this headline growth is made up of contrasting fortunes for different types of destination. For example, the town centre has lost 37% of annual study area derived turnover, whilst there have been increases

³⁶ excluding the influence of purely internet based shopping

in other locations across Torquay: The Willows (+26%), St Marychurch (+7.4%) and out of centre retail warehouse space (+114%).

- In Paignton there has been a consistent rise in turnover between 2014 and 2022. Overall, the town is attracting 85% more study area derived turnover, with Preston district centre growing by +245% and out of centre retail warehouses growing by +156%.
- A similar consistently positive approach can be found in Brixham, with an overall increase of +59% across the town and +47% for the town centre.

5.34 Turning now to the quantitative assessment of retail floorspace for convenience goods, Tables 9a-9c provide an estimate for each of the three main settlements. It should be noted that the forecasts in these tables are: (A) based upon constant market shares over the assessment period; (B) cumulative in nature³⁷

- Torquay. Table 9a takes into account the turnover associated with the committed ALDI foodstore at the Devon Garden Machinery site and indicates that there will be quantitative capacity for an additional 1,984sq m (net sales) convenience goods floorspace in Torquay at 2027. Table 9a indicates that, based upon a constant market share and assuming that no other additional floorspace becomes committed / operational, then this quantitative capacity will rise to 2,386sq m (net) by 2032 and 2,990sq m (net) by 2040.
- Brixham. Table 9c indicates a modest quantitative need for additional convenience goods floorspace in Brixham, with 404sq m (net) at 2022 and then remaining at the 400-500sq m (net) level between 2022-2040 (based upon a constant market share). This relatively low level of quantitative capacity is directly influenced by the reasonably low level of convenience goods market share in Brixham and has been a long-standing theme for Brixham in recent retail studies in Torbay. Therefore, one way of increasing the level of quantitative capacity for convenience goods floorspace in Brixham is to plan to raise the market share of the town centre in the future via a step change in provision (which would have a knock-on impact on capacity levels in surrounding settlements).
- Paignton. There is also a reasonably low level of quantitative expenditure / floorspace capacity in Paignton. This situation is understandable given the significant increases in convenience goods floorspace (both new openings and commitments) in recent years (including the opening of an ASDA since the completion of the previous household survey, plus new ALDI and Lidl stores). Table 9b indicates a surplus quantitative capacity of 319sq m net 2027, which is forecast to rise to 672sq m by 2032 and 1,202sq m by 2040.

5.35 Based upon the quantitative forecasts contained in Tables 9a-9c and summarised above, the quantitative case for new convenience goods floorspace provision would appear to revolve around three particular aspects:

- The opportunity for an increase in the level of provision in Brixham revolves around the ability to increase market share levels linked to a certain type of new provision. This new provision would need to offer 'something different' to existing facilities in the town in order to claw back convenience goods trips / expenditure which is currently being lost from the local area.

³⁷ i.e. in a hypothetical scenario where there is capacity for 2,000sq m at 2027 and 3,000sq m at 2032, the increase in capacity between 2027 and 2032 is 1,000sq m; in other words, a proposal which soaks up the 2,000sq m capacity at 2027 will leave the residual capacity at 2032 at 1,000sq m.

- Torquay has the highest level of quantitative capacity for convenience goods floorspace which is likely to be a product of the size of Torquay, its high market share and (despite the ALDI Devon Garden Machinery commitment) the lower level of new provision than Paignton in recent years. It should be noted that the forecast quantitative capacity is influenced primarily by the successful trading performance of the out of centre ASDA and Lidl foodstores (which have reduced the turnover of The Willows district centre) and the reasonably poor trading performance of the town centre. This would suggest that the provision of new convenience goods floorspace, using support from the quantitative capacity assessment, should be targeted in order that any new allocations are not simply predicated on the trading performance of out of centre stores and instead achieve benefits for the defined ‘town centre’ network across the town as a whole.
- Paignton. There is a no obvious quantitative case for new convenience goods provision in Paignton. This is due to the number of recent store openings / commitments and the ability of these new facilities to soak up any surplus capacity that previously existed.

5.36 Tables 10a-10f perform the same exercise for comparison goods floorspace in the three main settlements. As noted above, two alternative capacity scenarios are provided for each settlement: one linking benchmark turnover back to the quantitative assessment in the previous (2013) retail study; and an alternative which assumes that benchmark turnover equals actual turnover at the base year for the assessment. The contents of Tables 10a-10f can be described as follows:

- Torquay. Table 10a assesses quantitative comparison goods expenditure / floorspace capacity in Torquay based upon a link back to the 2013 retail study. The assessment shows that the benchmark turnover previously adopted for 2022 is slightly above the latest forecasts actual turnover for comparison goods stores in Torquay (£411m against £391m), although this difference is reduced by the forecast loss of comparison goods floorspace in Torquay town centre³⁸. The resultant ‘deficit’ in capacity at 2022 is -£15m, which is forecast to remain at a similar level to 2032 after which the ‘deficit’ falls to circa -£7.5m. Therefore, there is no obvious quantitative case to plan for an expansion the level of comparison goods floorspace in Torquay. If the equilibrium approach is taken, then Table 10b indicates a modest level of capacity of circa 1,100sq m net by 2027, rising to 2,100sq m net by 2032 and 3,300sq m net by 2040.
- Paignton. Table 10c at Appendix XX links the comparison goods benchmark turnover of Paignton to the level (for 2022) used in the 2013 retail study. Given that the previous benchmark turnover is lower than the current (2022) forecast actual turnover of stores across Paignton, Table 10c indicates a ‘surplus’ quantitative capacity of circa 4,000sq m net at 2027, rising slightly to circa 4,200sq m net by 2032 and 4,300sq m by 2040. The alternative is to assume an equilibrium level at 2022 and this is shown in Table 10d. The elimination of this positive difference between actual and benchmark turnover leads to a modest amount of ‘surplus’ capacity of 400-700sq m net between 2027 and 2040.
- Brixham. Finally, Tables 10e and 10f show that the greater level of additional (net) quantitative capacity for Brixham occurs in relation to the scenario which links benchmark turnover levels back to the 2013 retail study. This provides a level of capacity in the region of 900sq m net across the assessment period. Lower levels of capacity are forecast in the alternative scenario (Table 10f) which assumes an equilibrium turnover/benchmark level at the base year (2022) for the assessment.

³⁸ loss of former BHS store to a cinema

5.37 With regards to these forecast levels of quantitative expenditure / floorspace capacity for comparison goods floorspace, we consider that the following points are important to highlight:

- From the outset, it should be noted that quantitative indicators of expenditure / floorspace capacity are only one part of a wider basket of considerations in the overall assessment of need. In particular, growth in available retail expenditure, which could be translated into a floorspace capacity equivalent, may not match the ‘market position’ in relation to demand for comparison goods floorspace. Indeed, whilst the quantitative assessment does make an allowance for increases in floorspace efficiency, there is a good argument for allowing expenditure growth to be assigned to support existing floorspace in light of the general retail market position and also the forecast short-term challenges for the UK economy.
- With regards to the specific quantitative expenditure / floorspace capacity forecasts, it will be noted that the scenario for Paignton which links benchmark turnover back to previous is the only one where there is any sizable ‘surplus’ capacity. Given that this is only one scenario, and given the wider set of ‘need’ considerations, we do not consider that it should be automatically assumed that there is a requirement to plan for all of the forecast net additional capacity.
- As noted in earlier parts of this study, the current UK economic situation and the foreseeable short to medium term outlook for the UK economy is volatile and subject to certain risks. The economic forecasts used in the quantitative modelling in this study were published at the start of 2022 and therefore do not take into account the current economic outlook which has evolved swiftly over the course of 2022 (and will, no doubt, continue into 2023).

5.38 In summary, the forecast levels of quantitative need for convenience and comparison goods retail floorspace are as follows:

Table 5.1: quantitative convenience goods floorspace capacity (sq m net sales areas), 2022-2040

	2022	2027	2032	2040
Torquay	2,232	1,984	2,386	2,990
Paignton	312	319	672	1,202
Brixham	404	383	422	481

Notes: all floorspace figures are cumulative and are given in net sales area.

5.39 Table 5.2 below provides similar summary information from our comparison goods quantitative assessment.

Table 5.2: quantitative comparison goods floorspace capacity (sq m net sales areas), 2022-2040

	2022	2027	2032	2040
Torquay	0 – 1,409	0 – 1,098	0 – 2,142	0 – 3,331
Paignton	550 - 4,169	413 - 4,033	568 - 4,187	707 - 4,326
Brixham	0 - 910	0 - 874	0 - 887	0 - 890

Notes: all floorspace figures are cumulative and are given in net sales area.

Qualitative Need Assessment – Retail Floorspace

5.40 As noted above, for a long period of time, national planning policy and guidance advocated the consideration of qualitative factors as part of the overall consideration of 'need'. That policy / guidance has now been removed, but it has not been replaced with an alternative and we consider that consideration of qualitative issues remain a useful part of the assessment of 'need'.

5.41 Qualitative factors can vary in scope, depending upon the context, although they can include:

- The scale of leakage of expenditure / shopping trips from a particular area;
- the quality of the existing stock of retail floorspace; and
- the distribution of existing floorspace provision (including any gaps in provision).

5.42 Within previous retail studies in Torbay, the following qualitative issues have been raised:

- Torquay. The 2013 retail study noted that *“we remain of the view that there is an opportunity for qualitative improvements to occur in Torquay. However, this is very much focused upon the town centre’s retail offer in light of the quality of the existing stock of floorspace and the significant competition which is posed by out of centre retail warehouse provision and the Willows district centre. In terms of the types of comparison goods which offer the qualitative need for improvement, these are the non-bulky categories of clothes/shoes, personal/luxury and recreational goods, whilst there is a clear opportunity to retain more shopping trips associated with furniture, floorcoverings and textile goods.* For convenience goods floorspace provision, the 2013 retail study noted that the new ASDA store on Newton Road is likely to have reduced the over-trading position at The Willows district centre, adding to choice and competition, although the study also observed that there remained an imbalance in convenience goods floorspace with a qualitative deficiency in the town centre. The 2013 retail study also updated the gap areas analysis originally contained in the 2011 retail study and observed that: (A) the new ASDA store on Newton Road has significantly reduced the previously observed gaps in accessibility to grocery stores; and (B) the remaining gap would also improve accessibility and further reduce gaps in provision.
- Paignton. For convenience goods retail provision, the 2013 noted: *“Like Torquay, the main qualitative issue in Paignton is the balance between out of centre and town centre convenience retail provision. The out of centre stores dominate main food shopping trips whilst the town centre stores*

focus more on top-up food shopping trips. Therefore, when planning for additional provision, consideration should be given to whether there are opportunities in the town centre to redress this balance by providing a store which can attract main/bulk food shopping trips from local residents and compete with the Sainsburys, ASDA and Morrisons stores". For comparison goods, the 2013 study concluded that: "Some realism is required in terms of the provision of comparison goods floorspace within Paignton. It is located in close proximity to Torquay and whilst some retailers may have a requirement for stores in both towns, this is unlikely to be a common occurrence and our commercial analysis has found that the majority of demand for new comparison goods space will be directed towards Torquay in the future. As such, the qualitative need for improvement in Paignton is likely to focus upon the improvement in the quality of the existing floorspace stock and promoting smaller scale development opportunities than Torquay to attract new comparison goods retailers. Given the extent of commercial demand towards Paignton, it is unlikely that comparison goods retailers alone will be able to anchor a new town centre development scheme". The updated (2013) gap areas analysis for convenience goods provision found that there were small pockets of under-provision, including to the south of the town centre and potentially, should additional residential development occur, to the west of Brixham Road. However, these gaps were not considered to be substantial and had been improved via the opening of new stores such as ASDA.

- Brixham. In relation to convenience goods retailing in Brixham, the 2013 retail study (including the gap area analysis) reiterated the long-standing view that there was a qualitative deficiency in Brixham which, at that time, would have been filled by the committed Tesco store in the town centre. For comparison goods, the 2013 study noted: *"The picture for comparison goods retail provision in Brixham is similar to the historic convenience goods situation, namely a significant outflow of shopping trips primarily to Torquay although trips to Paignton and outside of Torbay also occur. As a consequence, there is an opportunity to improve qualitative aspects of provision within Brixham, although commercial issues surrounding retailer demand indicate that qualitative improvements are likely to be modest"*.

5.43 Against that background context, we set out below our updated analysis of qualitative issues which takes into account changes in circumstance since the completion of the 2013 retail study.

5.44 Based upon the current context and retail environment, we consider that the following issues are salient:

- Comparison goods floorspace. Whilst each of the three settlements in Torbay has its own characteristics in terms of retail provision and attractiveness to the retail sector, we consider that an overall analysis for qualitative issues associated with comparison goods retailing is warranted.
 - Historically, it has been possible to rank the three settlements in Torbay in terms of their respective contributions to the quality and type of comparison goods retail floorspace provision, with Torquay at the top, followed by Paignton and then Brixham. This was based upon the potential scale, breadth and type of floorspace which could be provided, taking into account the need to be realistic over market conditions and the local population catchment profile for each town centre.
 - Alongside this local catchment area profile is the visitor / tourism function of each of the three main town centres which is able to add a further element to the quality and type of provision which can be supported in each location and which may not be available to other non-tourist/visitor orientated centres.
 - With regards to the comparison goods retail sector generally, earlier parts of this study document have outlined the key recent / current trends, including: (A) the lower level of forecast growth in per capita expenditure on comparison goods than forecast in the 2013 retail study; and (B) the continuing rise in market share of internet shopping, as this shopping

channel diverts expenditure from traditional 'bricks and mortar' stores. Whilst these factors have had an influence on the quantitative floorspace capacity forecasts in this latest study, they will also have an influence over expectations regarding the quality, type and choice in comparison goods floorspace provision in Torbay. For example, it is likely that issues already identified in previous retail studies in Torbay will be reinforced and intensified, with the focus being on existing provision and how it adapts to wider retail market and land use planning influences. The general trend is for a reduction in traditional space in town centres, which has the potential to be reinforced by changes to the land use classification system (i.e. Class E) which can make it easier for retail stores to be replaced by leisure and other main town centre uses. In recent years the demand for comparison goods floorspace which has remained has been focused upon value orientated mixed goods retailers who have tended to prefer / requirement space outside of town centres due to the large retail unit format and the need for car parking provision.

- In the context of Torbay, these factors have tended to manifest themselves in a reducing number of national multiple retailers, due to competition from other centres and the internet and trends in town centres generally across the country. Therefore, the qualitative aspects of comparison goods provision in Torbay's town centres are now likely to focus upon how existing space is being used and how it needs to adapt in order to serve the dual needs of the local population and visitors. Some of these actions may well fall outside of the town planning system to control, although the updated strategy for the town centres will need to acknowledge that comparison goods retailing will now become one of a wider number of land uses required to support the health and attractiveness of the town centres, providing a niche / specialist / differentiated role in serving visitors / tourists in a way that traditional retailers / retail space cannot.

5.45 With regards to the qualitative aspects of convenience goods provision, we consider that the following indicators / issues are relevant for the purposes of TC's plan-making process:

- General comments. For the avoidance of doubt, this latest analysis has not re-visited in detail the gap areas and accessibility analysis contained within the 2011 and 2013 retail study documents. However, taking into account new retail floorspace commitments and/or other changes in circumstance since the 2013 retail study, our assessment does consider, on a general basis, whether the previous conclusions / observations remain valid.
- Torquay. In relation to material changes in Torquay since the completion of the 2013 retail study, it is important to acknowledge the following: (A) the prediction in the 2013 study regarding the new ASDA store reducing over-trading at The Willows district centre would appear to have been proven by the available evidence; and (B) there is now a commitment for a new ALDI foodstore on the north-western edge of Torquay. In relation to the latter, the new ALDI store will clearly improve choice and competition for residents of Torquay and its wider catchment (given the location of the site on the main entrance into the town from the west), although the provision of this store is unlikely to materially alter the previous (2011 and 2013) conclusions regarding gap areas and accessibility. Therefore, on a global basis, we conclude that Torquay displays good qualitative characteristics in terms of convenience goods retail floorspace provision, although internal distribution across the town remains an issue to address.
- Paignton. Over the past several years there have been new additions to the grocery retail sector in Paignton, via new store openings and new commitments. In addition to the ASDA store in the former Focus DIY retail unit, ALDI and Lidl have opened new stores on the western edge of the Paignton urban area, and there is a commitment for a further Lidl store at Great parks, Kings Ash Road (which is part of a planned new local centre). All of these three stores are provided in

locations planned for new local /neighbourhood centres in the adopted development plan with the aim of serving the growing population in this part of Paignton. These new stores have the ability to: improve choice and competition; aide accessibility to grocery retail provision; and, fulfil part of the development plan strategy for new small scale 'centres' in the retail hierarchy. Grocery retail provision is now very much weighted towards the western side of Paignton (in both out of centre locations and in three local centres promoted by the development plan) and it remains the case that there is a qualitative case for improvement in and around the town centre (in order to boost the amount and quality of provision).

- Brixham. Little has changed 'on the ground' in terms of convenience goods floorspace in Brixham since the 2013 retail study. In particular, it remains the case that there is a reasonably large amount of leakage of convenience goods to stores in Paignton and elsewhere and, aligned to this trend, is the lack of a store which is able to attract main food shopping trips. The previous proposal for a reasonably large Tesco supermarket on the Middle Street car park site in the town centre has now fallen away and there is currently no plan for an alternative. Therefore, it remains the case that Brixham has the most pronounced level of qualitative need for convenience goods floorspace of the three main settlements across Torbay.

Food and Beverage Floorspace – Quantitative Assessment

5.46 In addition to the assessment of quantitative need for retail floorspace, we have also undertaken an assessment of the quantitative need for food and beverage floorspace across the three main settlements. The assessment is contained within Tables 11a-11c at Appendix XVII and is structured as follows:

- Table 11a calculates the market share of existing food and beverage facilities across the three main settlements in Torbay. It is structured to provide separate market shares for café/restaurant visits and also pub/bar visits, and then brings them together in an amalgamated overall market share (based upon the weighting of expenditure between both types of trip).
- Table 11b translates the overall market shares in Table 11a into study area turnover levels, by zone, using the total available food and beverage expenditure levels in Table 3a.
- Table 11c takes the study area turnover levels in Table 11b and utilises them to estimate future levels of indicative food and beverage floorspace capacity.

5.47 When assessing future potential floorspace capacity, the following assumptions have been utilised:

- The food and beverage floorspace assessment uses the same study area as the retail floorspace capacity assessment and the same 2022 household survey results.
- In addition to study area derived turnover from local residents, it has been assumed that each of the three settlements, particularly their town centres, will benefit from 'expenditure inflow' from visitors and tourists who will spend money in various types of food and beverage establishments during their visits.
- We have assumed a constant market share for each settlement over the assessment period, which is the same as the retail assessment (i.e. 2022-2040).
- We have made an allowance for part of the growth in total expenditure across the assessment period to be assigned to existing facilities. We have assumed that this should be a 'turnover efficiency' increase of +3% per annum.
- In order to translate residual 'surplus' food and beverage expenditure into an indicative floorspace equivalent, we have used an indicative sales density of £3,500/sq m.

- The assessment has been based upon the same assumption as one of the comparison goods assessments that actual turnover will equal baseline turnover at start of the assessment in 2022.

5.48 The results of the assessment at Table 11c at Appendix XVII show the following indicative quantitative capacity levels³⁹:

	2022	2032	2040
Torquay	1,463sq m	3,129sq m	2,615sq m
Paignton	518sq m	1,108sq m	926sq m
Brixham	259sq m	553sq m	463sq m

5.49 The above table indicates that Torquay has the highest of the three capacity levels, rising from 1,500sq m in the short term to between 2,600sqm and 3,100sq m in the longer term. The capacity for Paignton is circa 500sq m in the short term, rising to circa 1,000sq m in the longer term. The capacity for Brixham is at around half this level, at 250sq m in the short term, rising to 500sq m in the longer term.

5.50 When reading and understanding these quantitative capacity figures, we would recommend that the following should be noted:

- It is important to acknowledge that food and beverage uses are important to the health all three town centres and therefore, alongside convenience goods retailing, this should be a priority 'main town centre' land sector for maintaining and enhancing.
- It should also be acknowledged that some or all of the quantitative need for net additional floorspace could be provided at any time through changes within Class E and permitted development rights. This should be taken into account when planning for new development proposals in town, district and local centres in Torbay, as existing retail and other service uses could move to F&B uses without recourse to any change of use planning permissions.
- Whilst any land redevelopment allocations would benefit from the inclusion of food and beverage floorspace, we do not consider that any significant allocations would be required in relation to this use in any future development plan document.

³⁹ All figures are gross floorspace figures

6. Planning Policy Advice

Introduction

- 6.1 As part of this Study, the scope of works agreed with TC includes advice on various aspects of retail and town centre planning policies for the development plan in Torbay. The NPPF asks LPAs to:

“define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters”

and

“define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre”.

- 6.2 As a consequence, the remainder of this section is split into two parts: (A) advice on the various designations for the main town and district centres across Torbay; and (B) advice on the content / wording of development management policies relating to proposals within and outside of town centres.

Town Centre Designations

- 6.3 Within the current adopted Torbay Local Plan, a different approach is taken in relation to town centres and district centres. Within the three main town centres four separate designations are provided: town centres, primary shopping areas, primary shopping frontages and secondary shopping frontages. In contrast, the three district centres have one ‘centre boundary’ definition. A key reason for the difference in approach to these two tiers of centre will be due to their respective size and function.
- 6.4 The extent of the four designated areas for each town centre is explained in Section 4 of this Study, although it should be noted that there has been a change in national policy towards ‘town centre’ designations in recent years. The previous version of national policy which would have been used to inform the 2013 retail study and the preparation of the current Local Plan referred to the same four designations as have been adopted for Torquay, Paignton and Brixham town centres.
- 6.5 However, the recent changes to the NPPF have reduced the number of ‘town centre’ designations from four to two, with the two ‘frontage’ designations not being referred to in either the ‘town centres’ section of the NPPF or its Glossary.
- 6.6 The reasoning behind these changes most likely lie in the changing nature of ‘town centres’ across the UK, including the land uses which are considered important to maintaining and enhancing their overall health, and how national planning policy reacts to these trends. This national policy reaction has come in two forms: first, changes in national planning policy in relation to the policy framework for ‘town centres; and, second, changes in the use classes order and permitted development rights. In relation to the latter, the details of which are described in Section 2 of this Study, it is clear that these changes required consequential amendments to national policy in order that the management of land uses and development proposals in ‘town centres’ takes into account the new classification of land uses and the widened flexibility available to certain types of retail and other main town centre uses.

6.7 With regards to the primary and secondary frontage definitions, whilst the formal requirement in the latest version of the NPPF has been removed, the NPPG does still refer to primary and secondary retail frontages. It notes that:

“The key way to set out a vision and strategy for town centres is through the development plan and (if needed) supplementary planning documents. Planning policies are expected to define the extent of primary shopping areas. Authorities may, where appropriate, also wish to define primary and secondary retail frontages where their use can be justified in supporting the vitality and viability of particular centres”. [our emphasis]

6.8 Therefore, a key question for this Study is whether there is merit in retaining the primary and secondary frontages in the current development plan. In order to answer that question we consider that the following factors are important:

6.9 Current development plan policy regarding change of use proposals in town centres is contained in Policy TC4. It provides a differentiated approach to primary and secondary frontages, although the policy approach to primary frontages is no different to primary shopping areas. TC4 notes that:

“Within primary shopping areas and primary frontages, as defined in the Policies Map, premises should be predominantly Use Class A1 ‘retail’, although Use Class A2 ‘financial and professional services’ and Use Class A3 ‘restaurants and cafes’ will be permitted where they support the vitality or retail function of the area”.

6.10 With regards to the defined primary shopping areas and primary frontages in each of the three centres, it should be noted that:

- Torquay – on the whole, the primary shopping area in Torquay town centre is the same as the primary frontage. The only divergence is in relation to The Strand where, unusually, the primary frontage is not accompanied by a primary shopping area definition.
- Paignton – the primary shopping area is significantly wider than the primary frontage, taking in Crossways shopping centre, part of Torquay Road, Torbay Road and the Victoria Centre.
- Brixham – the primary shopping area is slightly larger than the primary frontage, with the additional areas being small parts of Fore Street, Market Street and New Road.

6.11 Based upon the above, there is general consistency between how proposals in the primary frontage and primary shopping area in Torquay town centre are dealt with⁴⁰, although problems could arise in the other two town centres as the primary shopping area overlaps with part of the secondary frontage area (as each has a different approach to determining change of use proposals).

6.12 However, leaving aside that inconsistency, which would have had to have been rectified in any event, there is an opportunity to consider whether a policy approach to the required primary shopping area boundary negates the need for a separate primary frontage definition. This, in turn, would help to address the issue raised by the NPPG as to whether separate frontage definitions are required to support the vitality or retail function of a centre.

6.13 Historically, separate frontage definitions were deemed to be required given the significant importance of retailing⁴¹ to the health and attractiveness of town centres. This importance has, in

⁴⁰ and the designation of The Strand as primary frontage does not cause any particular issues as it does not overlap with any other designation.

⁴¹ i.e. former Class A1 retail uses, now Class E(a) uses

our opinion, diminished in recent years to the extent that, whilst they remain an important part of any town centre environment, they are now part of a broader suite of land uses which are required to maintain and enhance town centre health. Therefore, with the primary frontage areas very similar to the primary shopping areas, and both focusing upon retail land uses, it does not appear, in our opinion, to be necessary for a separate frontage definition to continue. We consider that this approach should be adopted for each of the three main town centres.

6.14 With regards to the areas outside of the primary frontages and the primary shopping areas, Policy TC4 also provides a framework for assessing proposals in the secondary frontage areas and the wider town centre boundary. The approach differs slightly but is not fundamentally different, with: (A) a continued, but more flexible / looser focus on retail uses, whilst allowing a wider set of land uses to be provided which contribute positively to health and character of the centre. In all three centres the town centre boundary is slightly wider than the extent of the secondary frontages, although the currently adopted approach in the Local Plan does not suggest that a separate secondary frontage is necessarily required to support the health and retail function of any of the town centres. Moreover, the available land use data does not suggest a fundamentally different character between these two areas, whilst it should also be reiterated that a wider set of land uses are now generally acknowledged to contribute towards town centre health, character and attractiveness.

6.15 Therefore, we would recommend that the number of designations in each of the three main town centres in Torbay is reduced from four to two (town centre boundary and primary shopping area), with the following recommendations for each of the two remaining areas:

- Torquay. We consider that Torquay's town centre boundary remains reflective of the concentration of 'main centre land uses' across the different character areas of the centre, ranging from the concentration of retail / shopping uses on Union Street, heading southwards along Fleet Street towards the seafront / harbour. In relation to the primary shopping area, this is currently tightly drawn and it is notable that there are also, beyond the existing defined area, a large number of retail uses along Fleet Street. However, given the evolving function of the town centre, national trends in retail and service uses, along with the need to attract a wider mix of uses to underpin the health of Torquay town centre, we do not recommend any changes to the existing primary shopping area boundary.
- Paignton. We do not recommend any change to the defined town centre boundary which, in our opinion, remains appropriate in terms of the extent of the collection and extent of 'main town centre uses'. However, we do recommend that TC consider a reduced primary shopping area in Paignton, which removes the following parts of the existing defined area: Torbay Road, Victoria Square, Palace Avenue and Crossways shopping centre. In our opinion, whilst these areas clearly remain part of Paignton's town centre, they have, or are, moving away from a primary shopping / retail role and, instead, into a wider set of land uses which are able to maintain and enhance the health of Paignton town centre.
- Brixham. We do not recommend any changes to the existing primary shopping area and town centre boundaries in Brixham. Based upon the current land use data, both provide an accurate reflection of their respective roles and functions.

6.16 With regards to the three district centres in Torbay, we have the following recommendations:

- General comments. At the present time, each of the three district centres has just one designation: the overall centre boundary. Given the scale of these centres, we do not consider that this situation should change and we would recommend that any updated strategy in a future

development plan for Torbay makes it clear that the defined 'town centre' boundary for these centres is the same as the primary shopping area for these centres.

- St Marychurch. We consider that the existing defined boundary for St Marychurch remains appropriate in terms of the collection and extent of 'main town centre' land uses and, therefore, no amendments are recommended.
- The Willows. Whilst a discussion over the general policy approach to The Willows district centre is contained later in this section, we consider that the existing boundary remains reflective of the concentration of retail uses in this area. In addition, there is a reasonable case for amending the existing centre hierarchy to include the neighbourhood centre at Condor Drive as part of a widened district centre boundary. This area is reasonably well integrated with the existing district centre boundary, although should TC take up our recommendation of amalgamating these two areas we would suggest that opportunities for better physical integration are explored.
- Preston. We consider that the existing defined boundary for Preston remains appropriate in terms of the collection and extent of 'main town centre' land uses and, therefore, no amendments are recommended.

Planning Policies

6.17 Turning to the content of retail / town centre strategy and development management policies, we have examined the content of the following policies in the current adopted Local Plan:

- TC1 – Town Centres. This is the main existing strategic policy governing the approach to development in all 'town centres' across Torbay. It explains the general 'town centres' first approach to development, along with the various strategies and aspirations for the defined centres. It also explains the opportunities for new centres to serve existing and growing local communities across Torbay. Whilst TC may wish to consider wider strategy changes to the main 'town centres', we do not consider that the general approach, in terms of retail and other main town centre uses (including the support given to existing and new centres) needs to change.
- TC2 – Retail Hierarchy. This existing policy outlines the four tiers of centres across Torbay which are the focus for retail development. In relation to potential updates to Policy TC2 we have the following comments to make:
 - The four tiers of centres. We consider that the existing approach of defining four different tiers of 'centre' across Torbay is an appropriate response to the scale and distribution of existing retail, leisure and main town centre land use provision. However, it should be noted that the NPPF indicates that neighbourhood centres are not a formal 'town centre' for the purposes of applying retail / town centre planning policy. Therefore, should TC wish to ensure that the health of neighbourhood centres is protected via the 'impact' policy test, and it is also included in the sequential test, we would strongly recommend that this is clarified in the text of the next development plan.
 - The land uses appropriate to the 'centre' hierarchy. At the present time, TC2 refers primarily to retail uses. This should, in our opinion, continue but we would recommend that the scope of this policy is widened to include other main town centre uses, in order to accord with the sequential test.

- TC3 – Retail Development. Policy TC3 is a wide-ranging policy which deals with development proposals within and outside of defined ‘town centres’. In response to the content of the current policy, we would recommend the following:
 - We do not consider that any changes are required to parts (A) and (B) of TC3 as they remain relevant in relation to the general approach to town centre development. However, some consequential changes will be required in order to align TC3 with town centre and primary shopping area matters.
 - TC3 also outlines a bespoke policy approach to The Willows district centre. This approach is now long-established and acknowledges the individual nature of this centre and, subject to the comments below, we recommend that this individual approach is maintained.
 - With regards to Part (D) of TC3, we recommend that this should be refined and apply to: (A) all main town centre land uses⁴² for the sequential test; and (B) retail and leisure uses for the impact test. In relation to the assessment of ‘impact’:
 - the updated policy should apply to retail and leisure proposals only in terms of the ‘impact’ test;
 - the updated policy should, when referring to impact assessments, require an assessment which considers both impact on vitality and viability and also impact on town centre investment;
 - any updated version of Policy TC3 should continue to refer to the need for cumulative impact assessments in appropriate circumstances⁴³; and
 - any updated version of TC3 should continue to refer to a locally-set impact assessment threshold, the details of which are discussed later in this section.
- TC4 – change of use. In order that the content of any updated version of Policy TC4 conforms to our recommended changes to the various ‘town centre’ boundary designations, we recommend that the following principles should be followed:
 - the policy will need to be re-organised in order to provide a specific and individual approach to proposals in the defined town centre and primary shopping area boundaries. In addition, any update to TC4 should also continue to deal with: (A) not just retail and leisure proposals in the town centre and primary shopping areas, but also other main town centre uses and residential uses (in light of the changes to the use classes order and permitted development rights); and (B) proposals for the change of use of local / village shops (including how they should be protected).
 - the update to TC4 should provide a specific criteria-based approach to change of use and development proposals in the defined primary shopping areas in each of the three main town centres (Torquay, Brixham and Paignton). The policy should continue the qualitative (rather than quantitative) approach to assessing proposals and we recommend that the following factors are taken into account:
 - Class E(a) retail floorspace is to be, in principle, supported as it conforms to the current definition of primary shopping areas in the NPPF, and the text of TC4 will need to be amended to remove reference to Class A1 uses.

⁴² as defined by the NPPF

⁴³ for example, cumulative impact assessments should be required when there are unimplemented retail and/or leisure land use commitments or recent openings (after the completion of the collection of evidence base data informing the assessment) in the catchment of the proposal (or outside of the catchment but likely to influence retail / leisure patterns in the catchment)

- There should not be any ‘in principle’ reason to resist any other sub categories of Class E land use⁴⁴, although it will be important to ensure that proposals within the new Class E category contribute in a positive manner to the health, vitality and attractiveness of the town centre they are located within. This will include the visual appearance of the proposal, its opening hours, plus its contribution to attracting residents and visitors/tourists to the town centre. As a consequence, the current references to A2 and A3 use in Policy TC4 will need to be replaced with references to Class E.
 - TC4 should also be updated and expanded to deal with the prospect of non-Class E proposals in the primary shopping areas. On this issue, it would appear sensible to continue with the hierarchy based approach in TC4 whereby the order of preference is: (A) retail uses remain the first choice use in primary shopping areas; (B) second, Class E uses are also to be conditionally supported; and (C) third, and finally, other land uses will be assessed in a similar manner to the approach already contained in Policy TC4 in terms of their effect upon the character of the primary shopping area and its role as the preferred location for retail and other Class E uses⁴⁵.
- The updated version of Policy TC 4 should also deal with change of use and other development proposals within the defined town centre boundaries but outside of the defined primary shopping areas. In line with the general theme contained within the existing version of Policy TC4, the approach to the acceptability of land uses will be more relaxed than the primary shopping areas although the general themes should stay the same, albeit with references to retail swapped for references to Class E uses. For example, the updated policy should ensure that proposals: (A) do not undermine the vitality, viability and character of the town centre; (B) cause unacceptable fragmentation of retail / Class E uses in the town centre; (C) result in over dominance of non-Class E uses; and (D) contribute to town centre vitality and provide active ground floor frontages.
 - The updated version of Policy TC4 should also deal with proposals within other ‘town centres’ in the defined hierarchy – i.e. – district, local and neighbourhood centres. As recommended earlier in this section these centres should only possess one boundary definition and the general approach to these centres should be the same as outline above for the three main town centres⁴⁶.

6.18 As noted above, Policy TC3 provides a bespoke approach to The Willows district centre. This ‘town centre’ is in the formal hierarchy but the existing policy requires retail proposals within the centre to be assessed against the sequential and impact tests. This approach has a long history and is based upon the considerable influence which The Willows has on local convenience and comparison goods shopping patterns and historical impact that it has had on Torquay town centre over the past two decades.

6.19 In our opinion, this existing approach should remain in place as, whilst the turnover of the centre has decreased in recent years due to the opening of the out of centre ASDA supermarket in Torquay, it now has the largest convenience / comparison turnover of any single retail destination in Torbay which means that it continues to play a disproportionate role in retailing in the local area. Given the current role and function of The Willows, we would recommend that, in line with the current policy,

⁴⁴ this is a current unique characteristic of the planning policy / land use classes order environment, whereby the primary shopping area is defined by its focus upon retail / shopping uses, but retail uses (Class E(a)) now fall within a wider category containing other main town centre uses (such as cafes, restaurants, office and certain leisure uses). Therefore,

⁴⁵ including the impact on the overall character of the primary shopping area, and their ability to provide a positive contribution to the role and function of the town centre in question.

⁴⁶ i.e. proposals within the main town centre boundaries, but outside of the defined primary shopping areas.

the sequential approach concentrates upon assessing the suitability and availability of alternatives in the three higher order town centres for main town centre land uses proposals, and it follows the same approach to assessing 'impact' as edge or out of centre retail and leisure proposals.

6.20 Finally, the agreed brief for this Study requires us to re-visit the rationale for setting a local impact assessment threshold. At the present time, Policy TC3 sets a threshold of 500sq m gross for requiring impact assessments associated with retail development proposals in out of centre locations. Having considered the existing policy approach, we recommend the following:

- the impact test should relate to retail and leisure proposals in edge and out of centre locations in order to confirm with the NPPF.
- the test should continue to deal with both solus and cumulative impact issues and should take into account the impact on all relevant defined 'town centres' in the catchment of the proposal.
- the assessment of impact should consider the likely effects of the proposal on both town centre vitality and viability and also town centre investment. In relation to the latter, the updated version of TC3 should continue to refer to planned new 'town centres', and these new 'town centres' should also feature as part of the sequential test.
- The supporting text to the updated version of TC3 should encourage applicants to agree the scope of retail, leisure and main town centre land use assessments with TC prior to the submission of planning applications⁴⁷.
- With regards to the current locally-set threshold of 500sq m (gross) we have re-visited the previous justification for this threshold and have reached the view that it remains appropriate in the context of local town centre health issues across Torbay along with the scale of existing retail and leisure provision.

⁴⁷ this scoping exercise should include: the defined 'town centres' to be included in the assessment of alternative sites and premises for the sequential test; the 'town centres' to be included in the assessment of 'impact'; plus the evidence base data to be adopted for the 'impact' assessment.

7. Summary and Conclusions

7.1 This Retail Study report has been prepared by Avison Young for Torbay Council in order to provide up to date evidence on retail and town centre issues for an update to the Torbay Local Plan. Preparation of the Local Plan Update commenced in 2021 and the Council wishes to understand how its town and district centres are functioning, along with a review of the impact of recent changes in the use classes order and permitted development rights.

7.2 This report contains information and analysis in relation to the following areas:

- an analysis of recent/current retail trends, including expected changes in retail expenditure and the on-going effects of on-line retailing / the impact of COVID-19 on shopping and leisure patterns.
- an assessment of current shopping patterns for food and non-food goods, along with the usage of food and beverage facilities, plus the three main town centres in Torbay.
- in order to inform future policy-making, the provision of focused health check reviews of the three main town centres in Torbay, along with the three district centres in Torquay and Paignton.
- an assessment of the 'need' for food and non-food retail floorspace across the three main settlements in Torbay.
- advice on the content of retail and town centre planning policies, in relation to proposals within or outside of defined 'town centres', including the approach to the new Class E use category and the provision of new local / neighbourhood centres.

7.3 With regards to the assessment of the health of the three main town centres, the following information has been gathered:

- Torquay town centre:
 - Continuing the trend seen in previous retail studies, there is a falling number of comparison goods shops in the town centre. This is also part of a national trend in other town centres across the country, but is nevertheless a key issue for the Council to be aware of as it plans for the future of Torquay town centre.
 - Again, in line with the national trend, the evidence which has been collected for this study indicates a slight strengthening of the convenience goods shopping provision in the town centre. It is not significant, but nevertheless helps to address a long-standing qualitative need in the centre and, in turn, broadens the type of provision.
 - It is notable that service uses now are the largest sector in the town centre in terms of the number of units. A growing number of service uses in a town centre mirrors the national trend, but this data also is reflective of Torquay town centre's role.
 - A key concern will be the continued loss of retailing market share and turnover in the town centre. Whilst all town centres are facing similar challenges, this is trend which has continued for some time in Torquay and highlights why the Council will need to consider the main role of the town centre going forwards.
 - As part of this issue is the continued high number / proportion of vacancies in the town centre, which well above the national average.
- Paignton town centre:
 - Paignton town centre mirrors the trends seen in Torquay town centre, with a growing number of convenience goods and service outlets and a falling number of comparison goods outlets. However, the latest land use survey of the town centre does indicate that, despite these changes, the proportions of these use are similar to their respective national averages.

- Vacancies have continued to rise and remain slightly above the national average.
 - The market share of the town centre for convenience goods shopping has fallen since the previous retail study, which is considered to be unsurprising given the opening of new out of centre and local / neighbourhood centre stores in the western part of the town. This has resulted in a fall in convenience goods expenditure being attracted to the town centre.
 - In relation to comparison goods, there have been changes in the town centre and the picture has been mixed. However, the turnover of the town centre has, since the previous retail study, increased by around one third.
- Brixham town centre:
- The town centre has a small comparison goods shopping catchment which is largely confined to the local area, which is also true for convenience goods shopping. The centre has a largely top-up food shopping role which has not changed in recent years.
 - The land use profile of the centre has not seen any significant changes in recent years, apart from a fall in the number of comparison goods retail outlets (although the proportion of these uses remains above the national average).
 - Vacancies in the town centre have fallen since the previous retail study and are now around half of the national average.
 - The centre has a small but strong catchment for food and beverage visits from the local community, attracting around two-thirds of all trips from Brixham residents.

7.4 The assessment of quantitative need for convenience and comparison goods floorspace, along with food and beverage floorspace provides the following forecasts:

Table 7.1: quantitative convenience goods floorspace capacity (sq m net sales areas), 2022-2040

	2022	2027	2032	2040
Torquay	2,232	1,984	2,386	2,990
Paignton	312	319	672	1,202
Brixham	404	383	422	481

Notes: all floorspace figures are cumulative and are given in net sales area.

7.5 Table 7.2 below provides similar summary information from our comparison goods quantitative assessment.

Table 7.2: quantitative comparison goods floorspace capacity (sq m net sales areas), 2022-2040

	2022	2027	2032	2040
Torquay	0 - 1,409	0 - 1,098	0 - 2,142	0 - 3,331
Paignton	550 - 4,169	413 - 4,033	568 - 4,187	707 - 4,326
Brixham	0 - 910	0 - 874	0 - 887	0 - 890

Notes: all floorspace figures are cumulative and are given in net sales area.

Table 6.3: quantitative capacity for food and beverage floorspace, 2022-2040

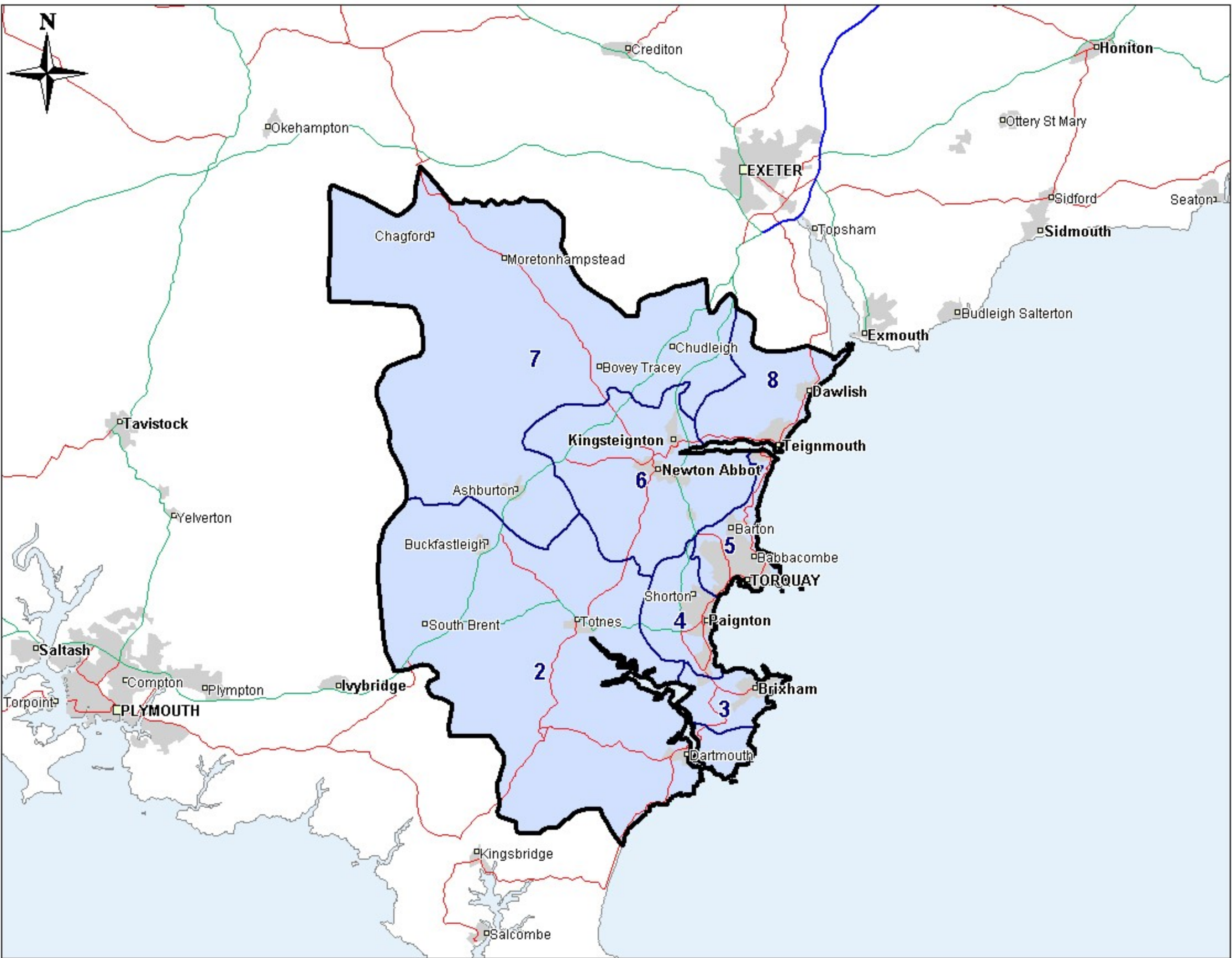
	2022	2032	2040
Torquay	1,463sq m	3,129sq m	2,615sq m
Paignton	518sq m	1,108sq m	926sq m
Brixham	259sq m	553sq m	463sq m

- 7.6 With regards to planning policy issues, the following recommendations have been made regarding the defined areas in each town centre:
- Torquay. We consider that Torquay's town centre boundary remains reflective of the concentration of 'main centre land uses' across the different character areas of the centre, ranging from the concentration of retail / shopping uses on Union Street, heading southwards along Fleet Street towards the seafront / harbour. In relation to the primary shopping area, this is currently tightly drawn and it is notable that there are also, beyond the existing defined area, a large number of retail uses along Fleet Street. However, given the evolving function of the town centre, national trends in retail and service uses, along with the need to attract a wider mix of uses to underpin the health of Torquay town centre, we do not recommend any changes to the existing primary shopping area boundary.
 - Paignton. We do not recommend any change to the defined town centre boundary which, in our opinion, remains appropriate in terms of the extent of the collection and extent of 'main town centre uses'. However, we do recommend that TC consider a reduced primary shopping area in Paignton, which removes the following parts of the existing defined area: Torbay Road, Victoria Square, Palace Avenue and Crossways shopping centre. In our opinion, whilst these areas clearly remain part of Paignton's town centre, they have, or are, moving away from a primary shopping / retail role and, instead, into a wider set of land uses which are able to maintain and enhance the health of Paignton town centre.
 - Brixham. We do not recommend any changes to the existing primary shopping area and town centre boundaries in Brixham. Based upon the current land use data, both provide an accurate reflection of their respective roles and functions.
- 7.7 With regards to the content of retail and town centre policies in the development plan, the following recommendations have been made:
- We do not consider that any changes are required in relation to the main strategic town centres policy (TC1).
 - Policy TC2 should be amended slightly in order to ensure that the health of neighbourhood centres is protected via the 'impact' test, and that the range of appropriate land uses in all levels of the centre health includes all main town centre uses.
 - We have recommended that updates are made to Policy TC3 in relation to the land uses which are to be considered as part of the impact test (retail and leisure) and also that the sequential test should apply to all main town centre uses.

- Policy TC4 should be updated in light of: (A) changes to the use classes order; and (B) recommended changes to the town centre boundaries and frontages in Torbay.
- No changes have been recommended in relation to the existing policy approach to development proposals at The Willows district centre in Torquay.
- Finally, small minor refinements have been recommended in relation to the current locally-set 'impact' assessment test, in relation to the locations and uses which should be subject to the impact test.

Appendix I

2022 Household Survey Area



Study Area & Household Telephone Survey Zones

KEY

- Study Area Boundary
- Survey Zone

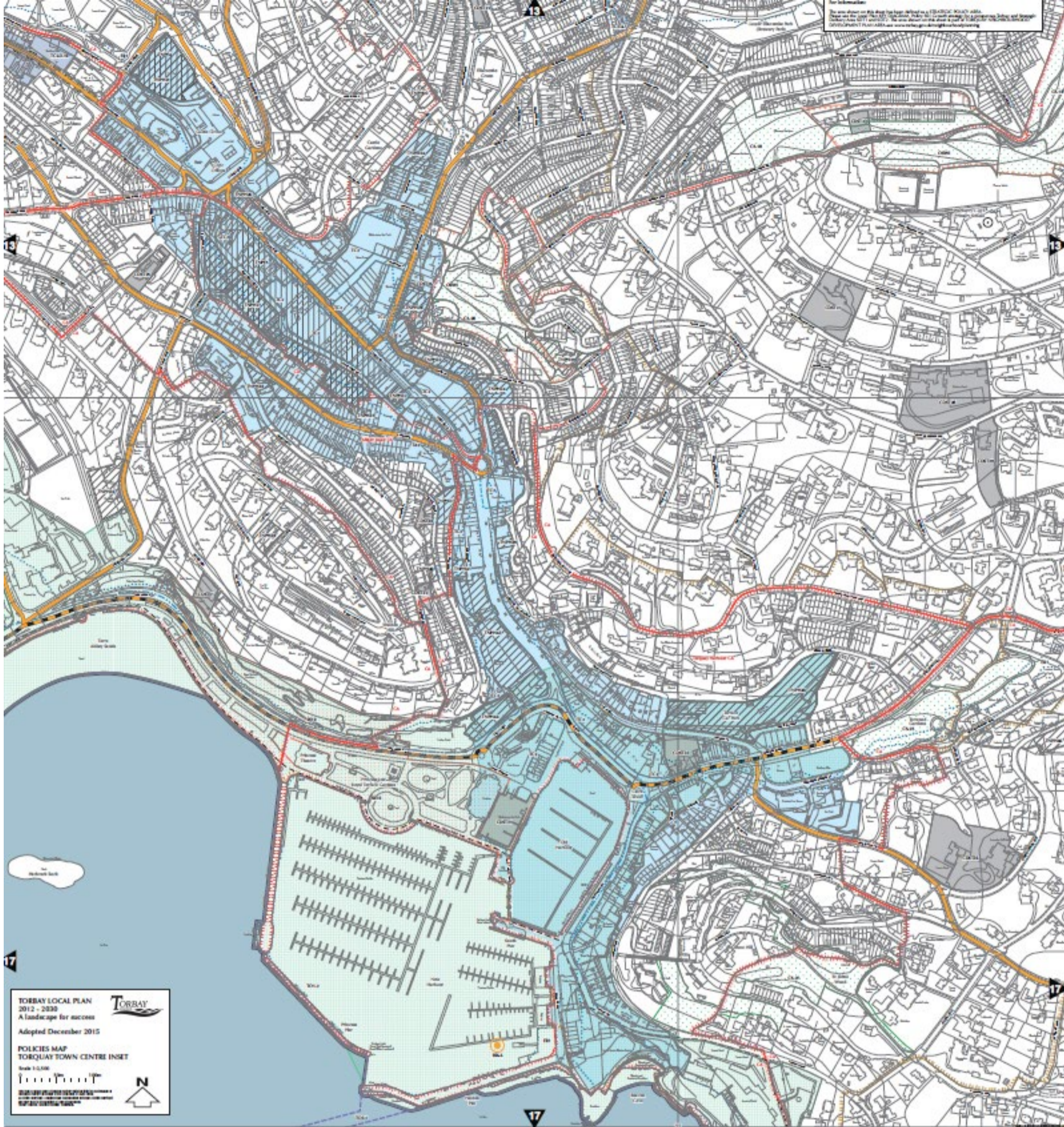
Zone	Postal Sectors
2	TQ6 0/9, TQ9 5/6/7, TQ10 9, TQ11 0
3	TQ5 0/8/9
4	TQ3 1/2/3, TQ4 5/6/7
5	TQ1 1/2/3/4, TQ2 5/6/7/8, TQ14 0
6	TQ12 1/2/3/4/5/6
7	TQ13 0/7/8/9
8	EX7 0/9, TQ14 8/9

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Torbay Retail Study 2022

Appendix II

Policies Map for Torquay Town Centre



For information
please contact the Planning Department on 01392 262222
or visit our website at www.torbay.gov.uk
or email planning@torbay.gov.uk

TORBAY LOCAL PLAN
2012 - 2020
A landscape for access
Adopted December 2015

TORBAY

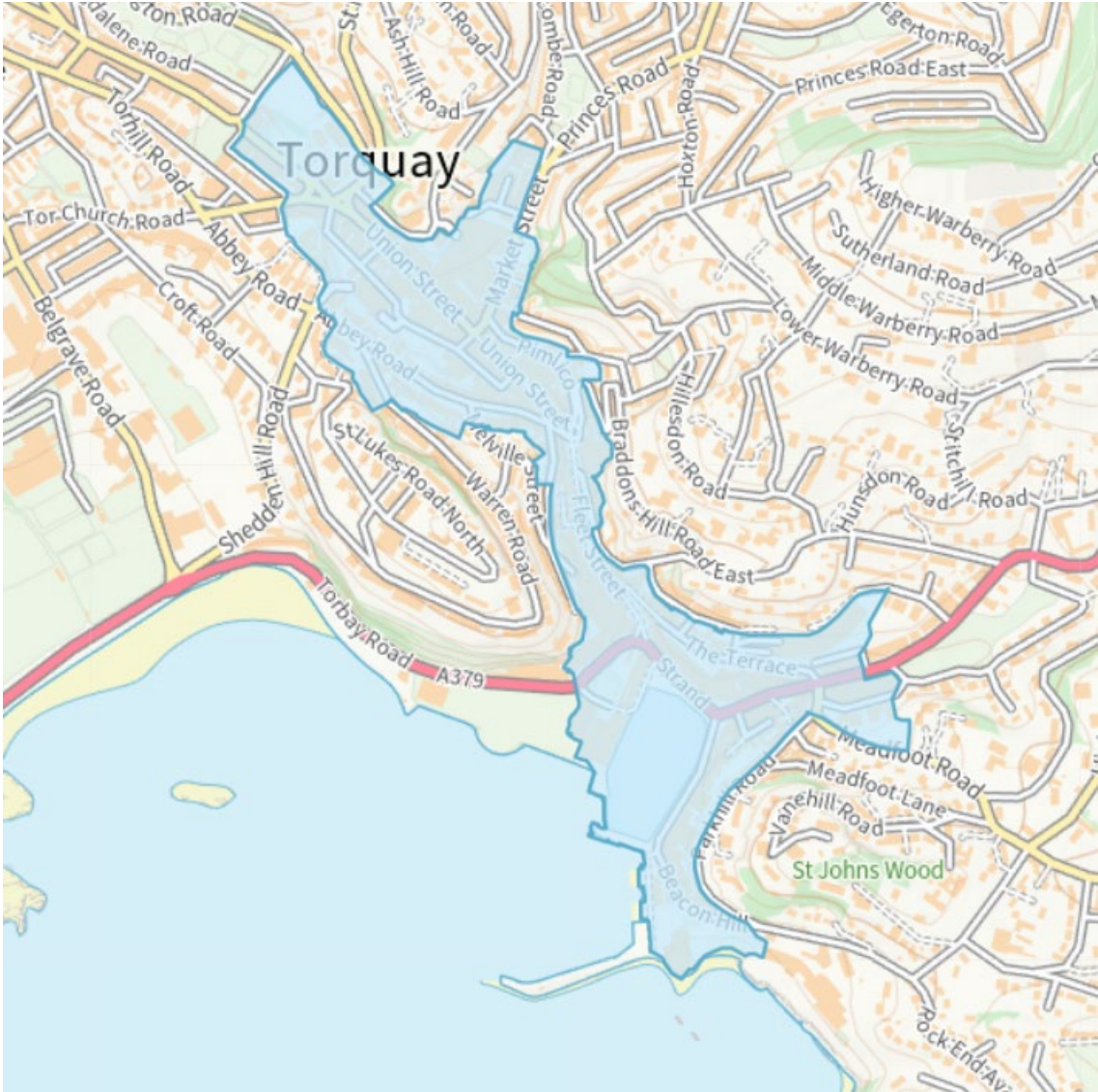
POLICIES MAP
TORQUAY TOWN CENTRE INSET
Scale 1:1,000

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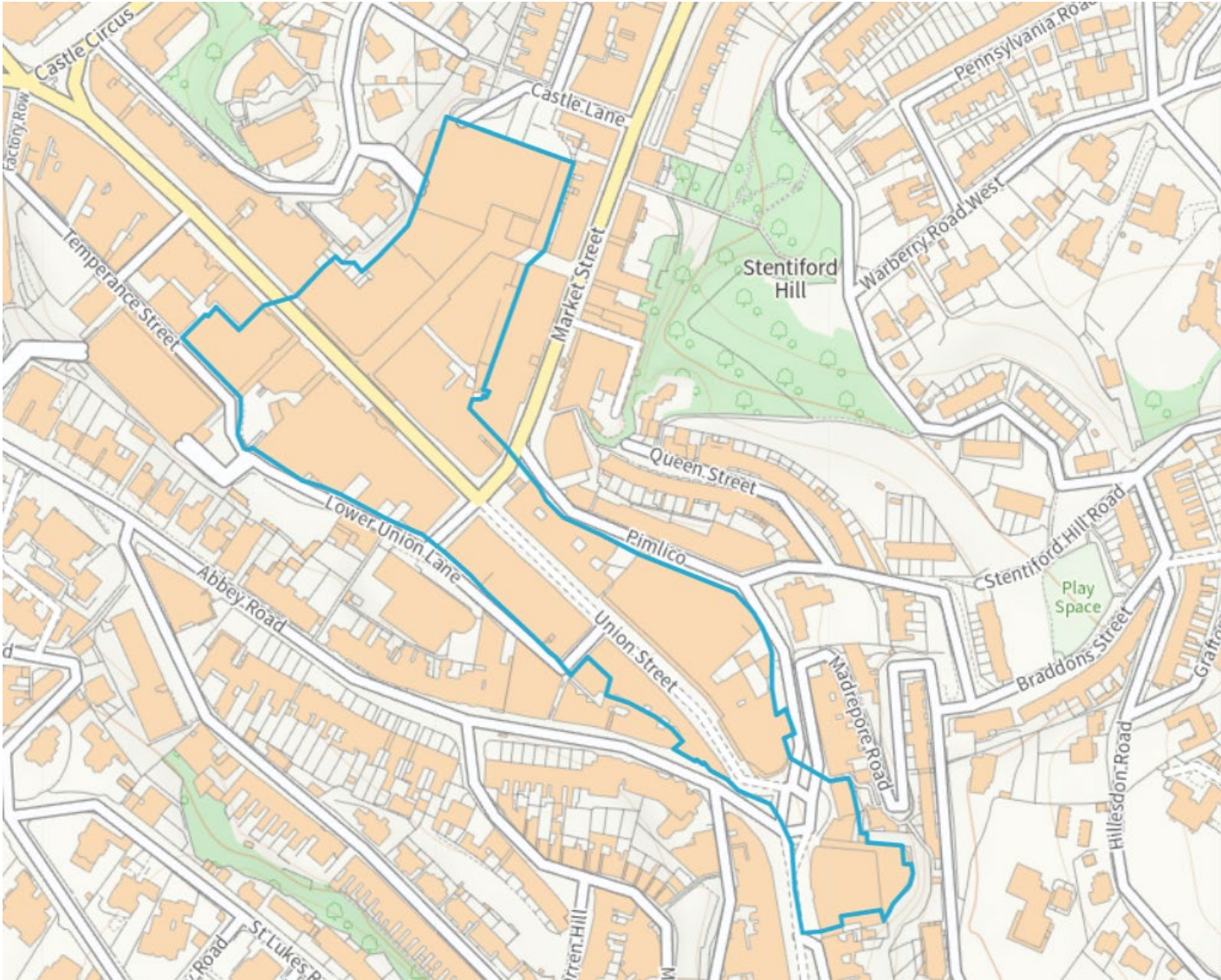
Appendix III

Torbay Town Centre Boundary



Appendix IV

Torquay Primary Shopping Area Boundary



Appendix V

Torquay Town Centre Primary and Secondary Retail
Frontages



Appendix VI

Policies Map for Paignton Town Centre

For information:
The area shown on this sheet has been defined as a STRATEGIC POLICY AREA.
Please see the Local Plan 2012-2030, Policy S21 Growth strategy for a prosperous Torbay and Strategic
Delivery Area (SDPA) and SDP2. The area shown on this sheet is part of PAIGNTON NEIGHBOURHOOD
DEVELOPMENT PLAN AREA see www.torbay.gov.uk/neighborhoodplanning


TORBAY LOCAL PLAN
2012 - 2030
A landscape for success

TORBAY

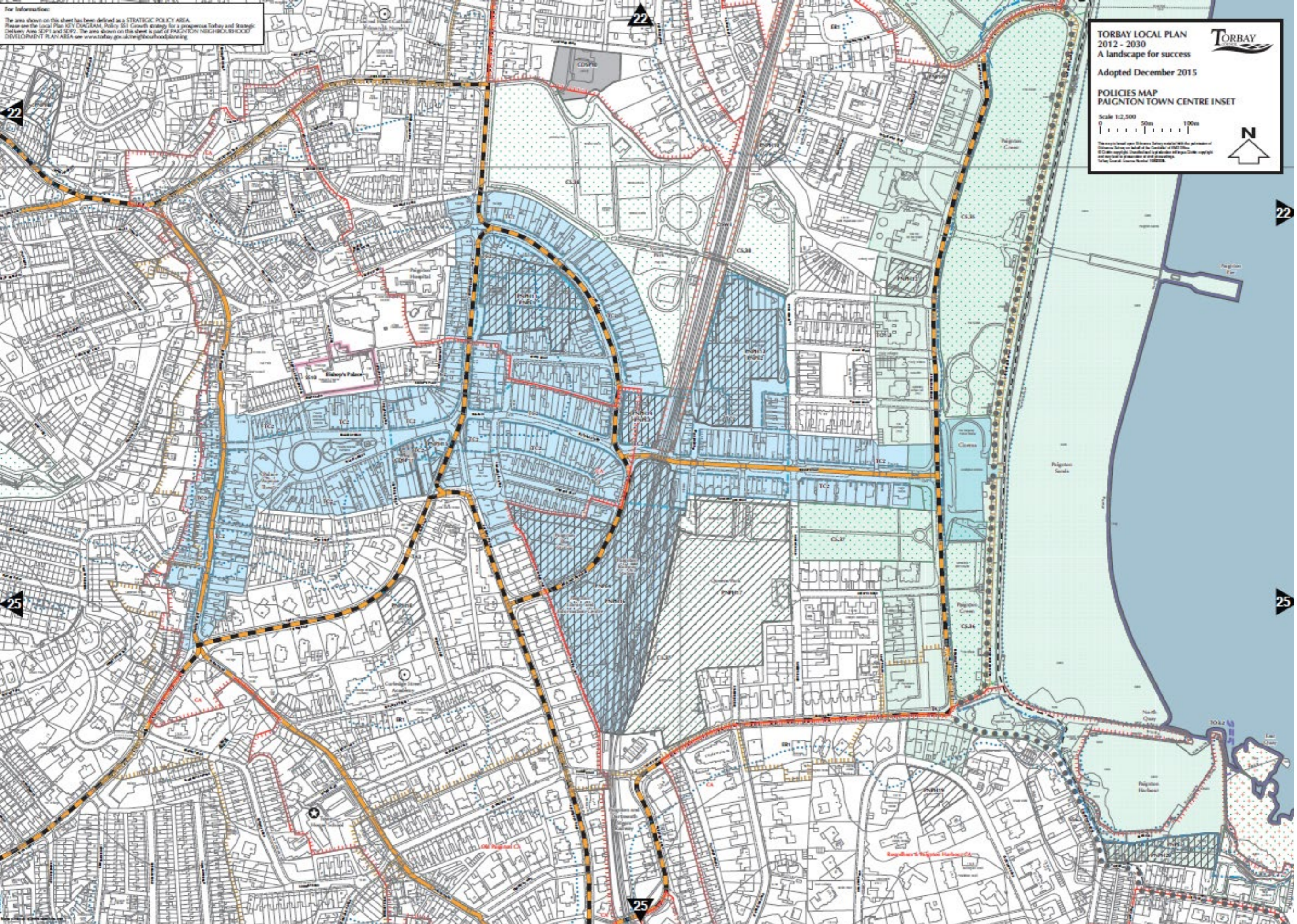
Adopted December 2015

POLICIES MAP
PAIGNTON TOWN CENTRE INSET

Scale 1:2,500
0 50m 100m

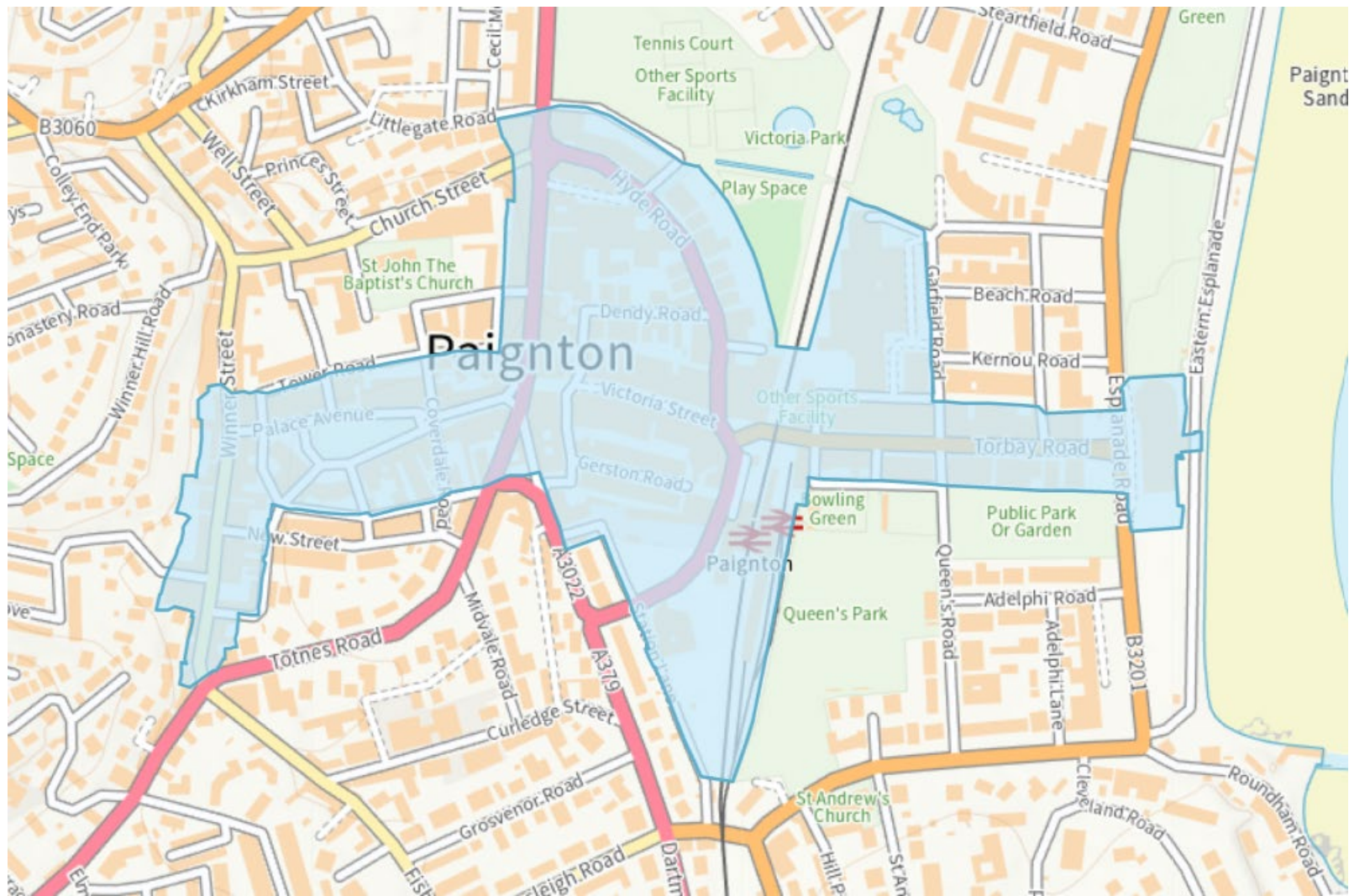


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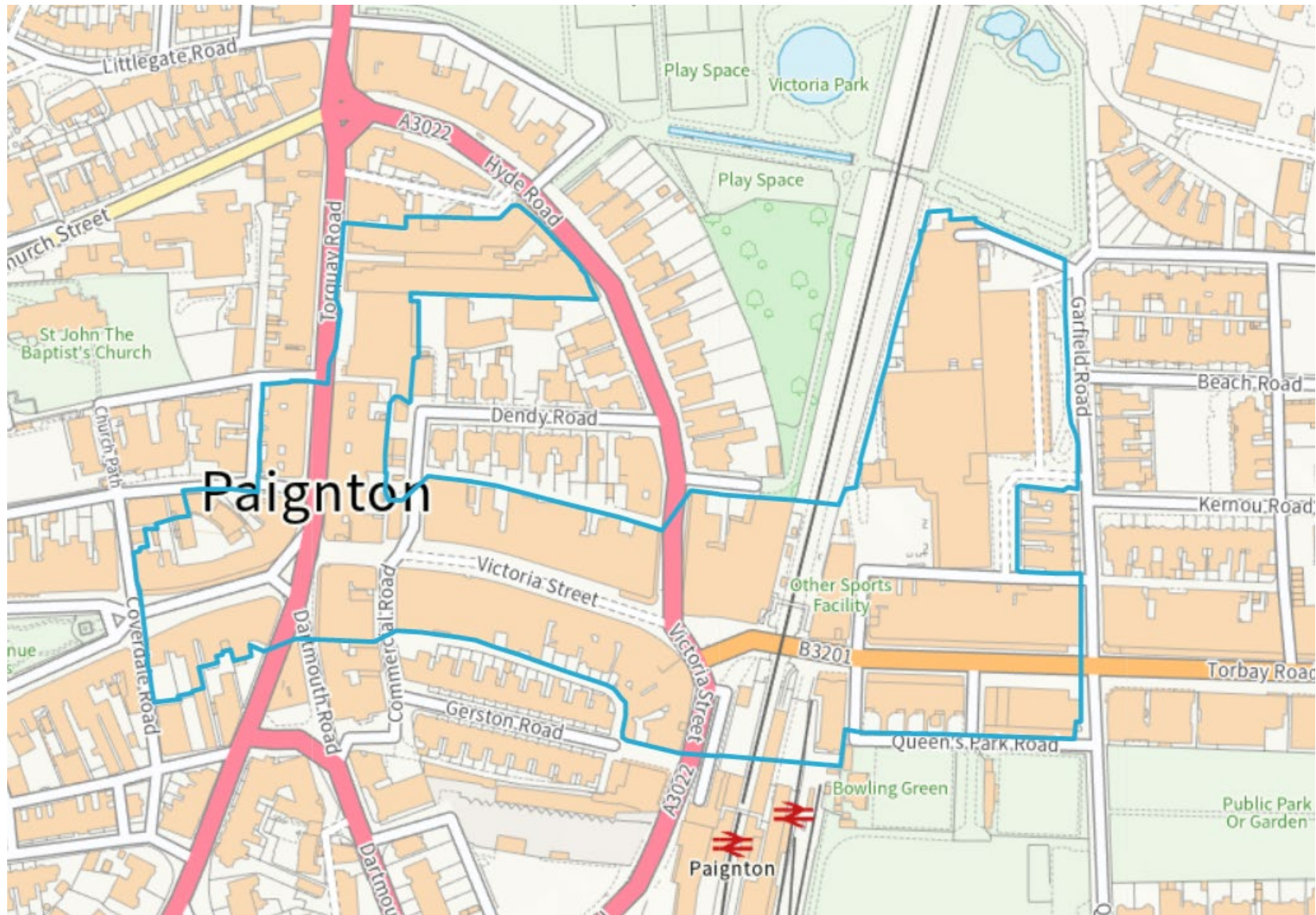
Appendix VII

Paignton Town Centre Boundary



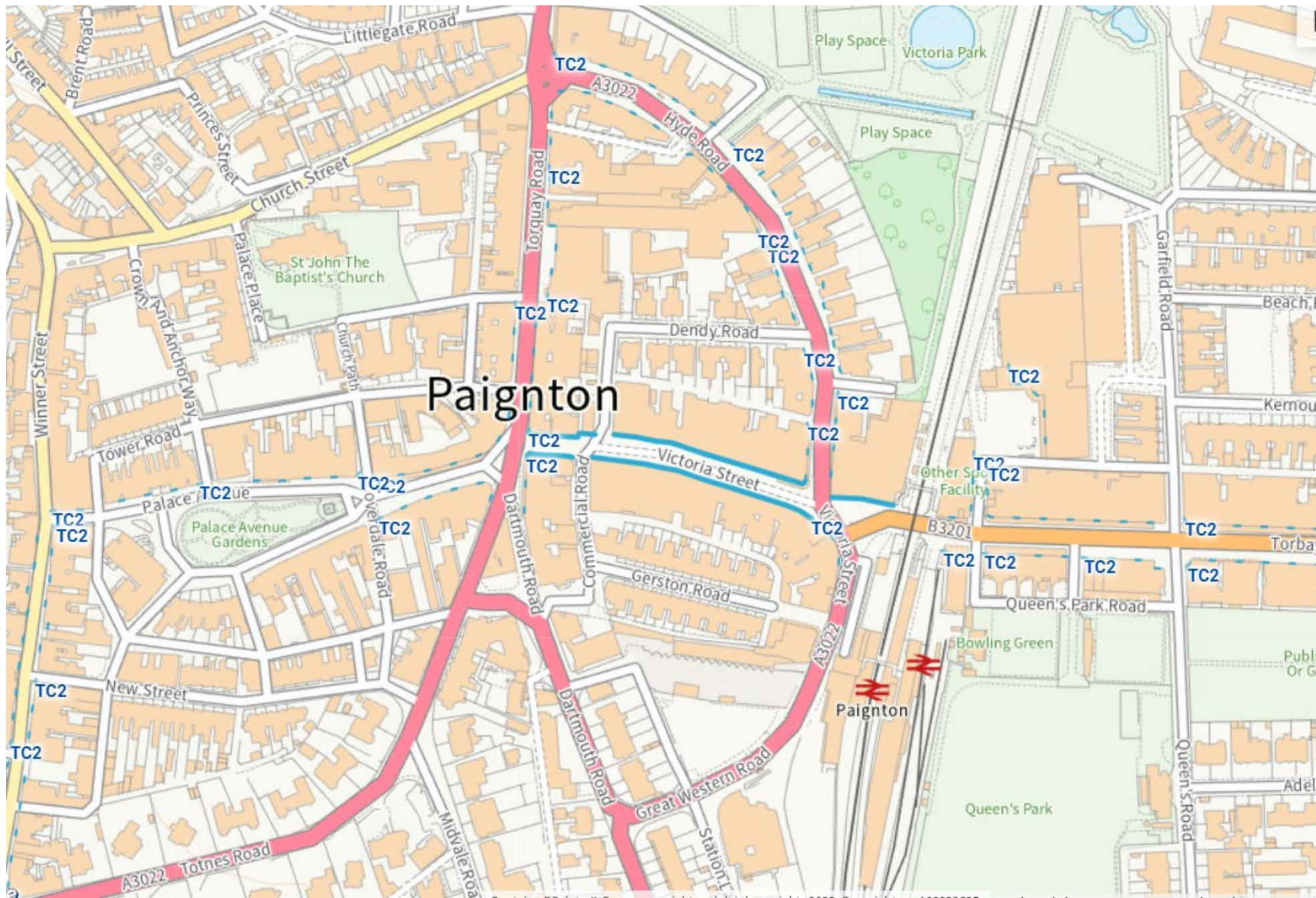
Appendix VIII

Paignton Primary Shopping Area Boundary



Appendix IX

Paignton Town Centre Primary and Secondary Retail
Frontages



Appendix X

Brixham Town Centre Policies Map

For Information:
The areas shown on this sheet have been defined as a STRATEGIC POLICY AREA.
Refer to the Local Plan (2012-2030) Policy 001, Growth strategy, to a secondary, tertiary, and Strategic
Gateway Area (SEA) and SEA2. The area shown on this sheet is part of the SEA1 Strategic
Growth Area (SEA1) and SEA2 Strategic Growth Area (SEA2).



TORBAY LOCAL PLAN
2012 - 2030
A landscape for success



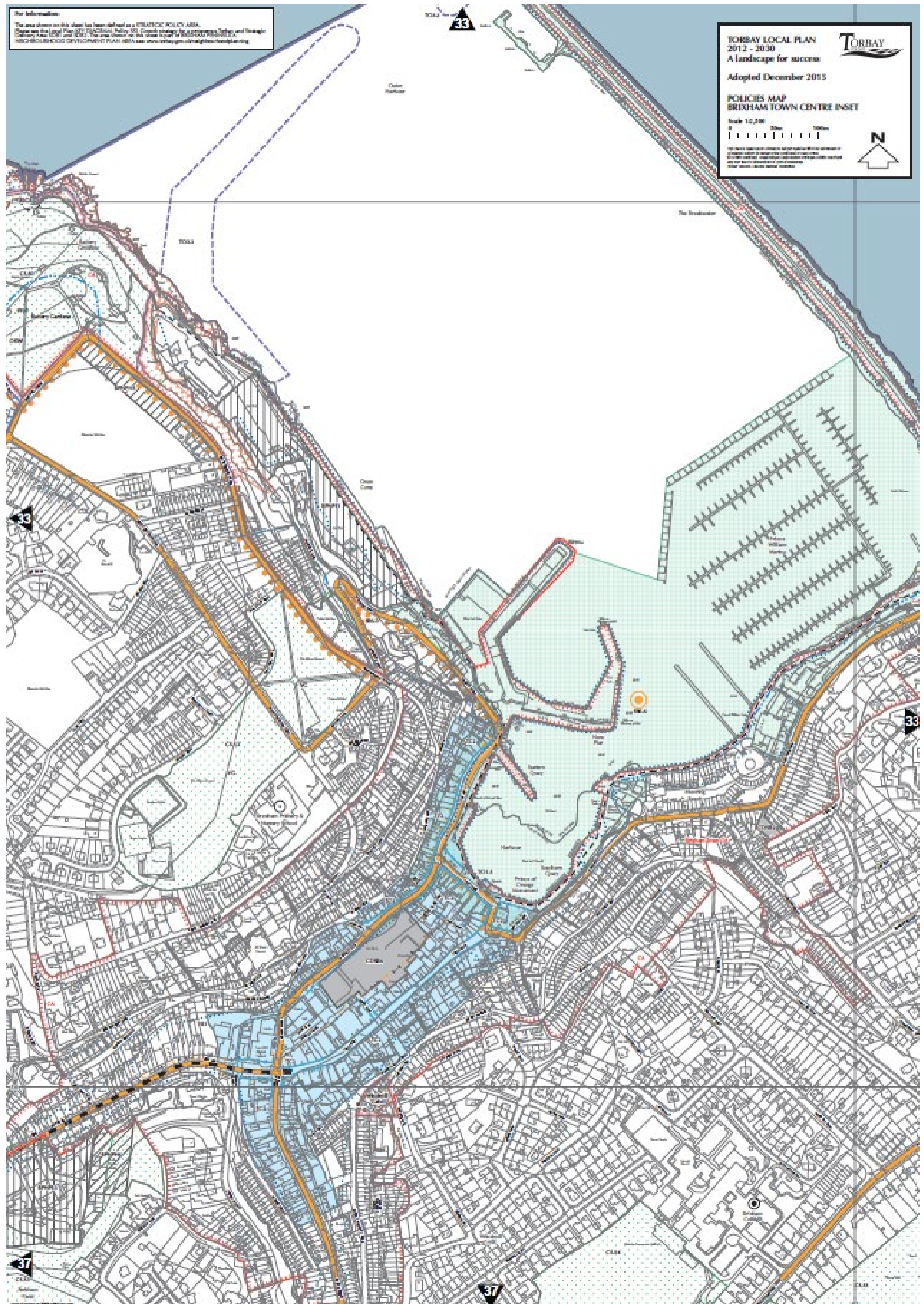
Adopted December 2015

POLICIES MAP
BRIDHAM TOWN CENTRE INSET

Scale 1:2,500

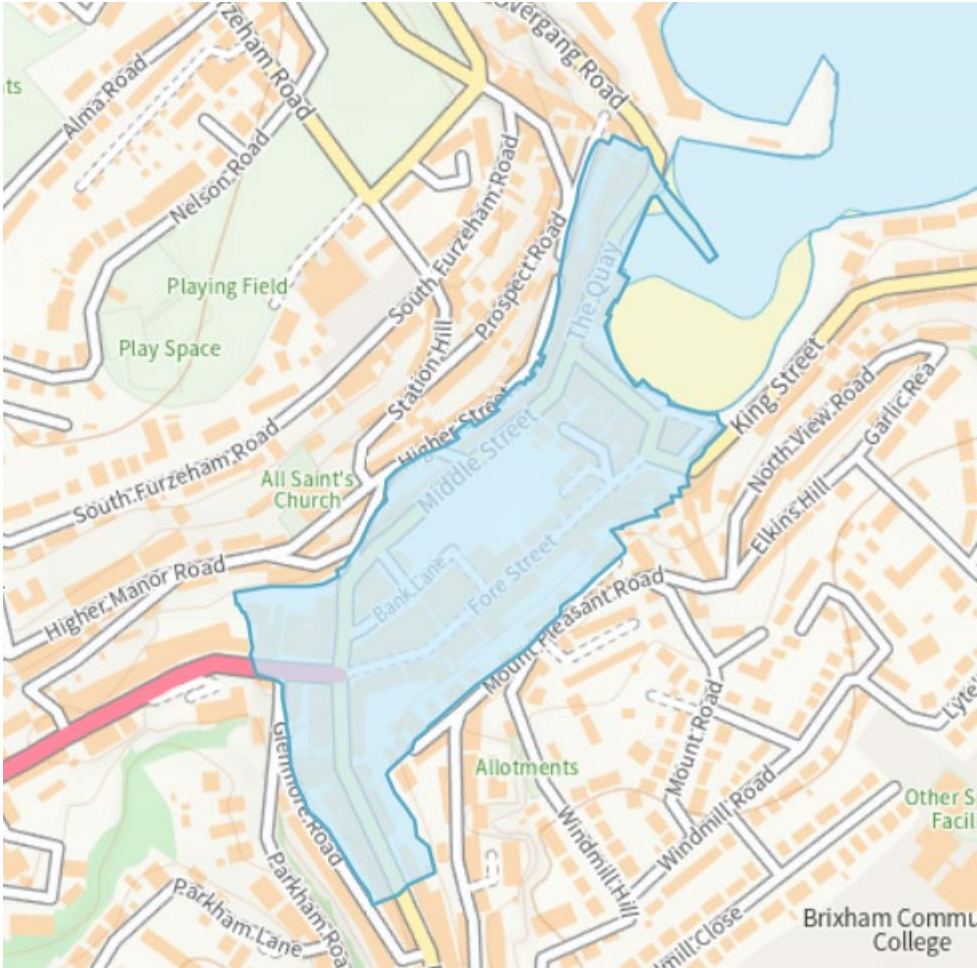


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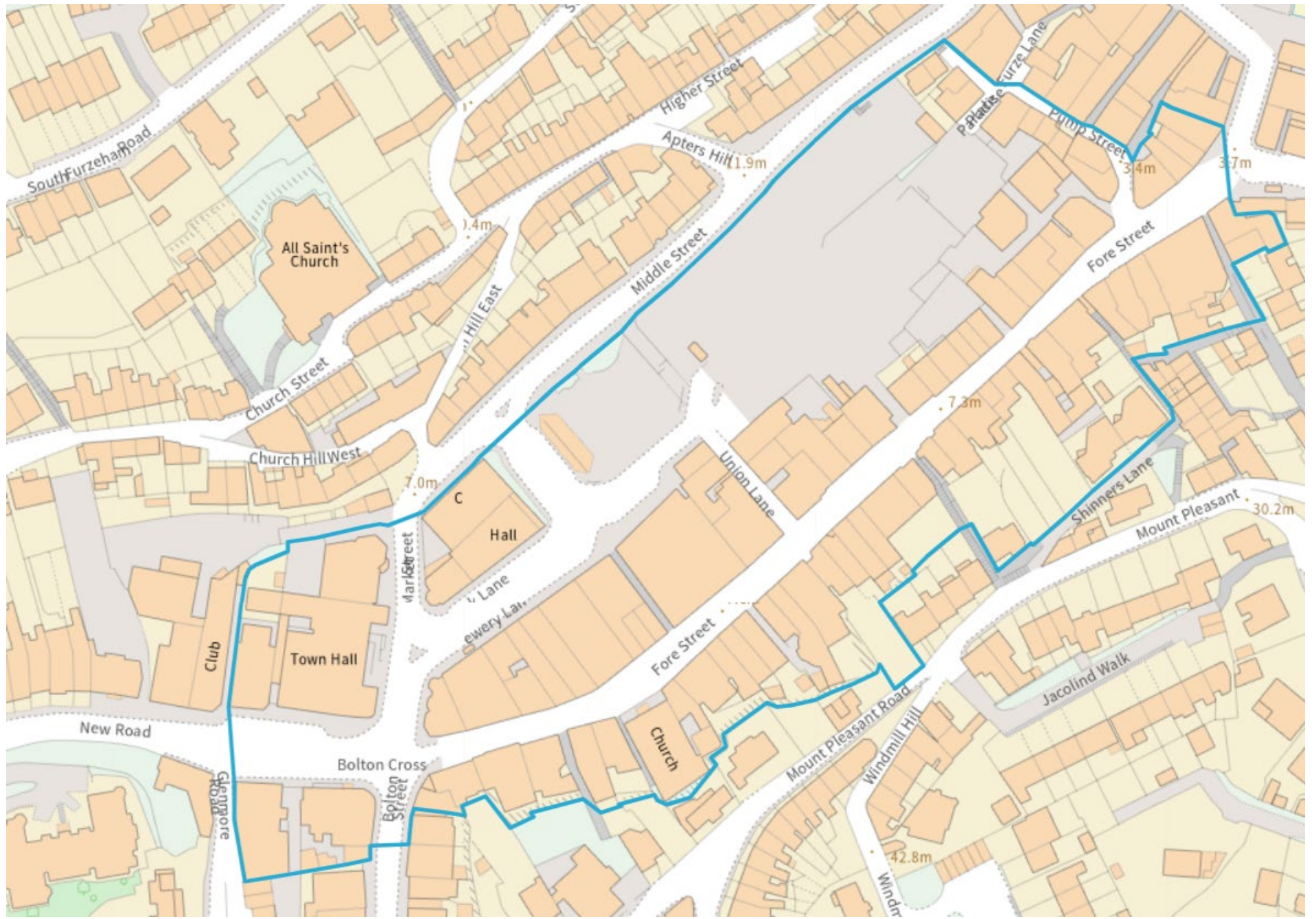
Appendix XI

Brixham Town Centre Boundary



Appendix XII

Brixham Primary Shopping Area Boundary



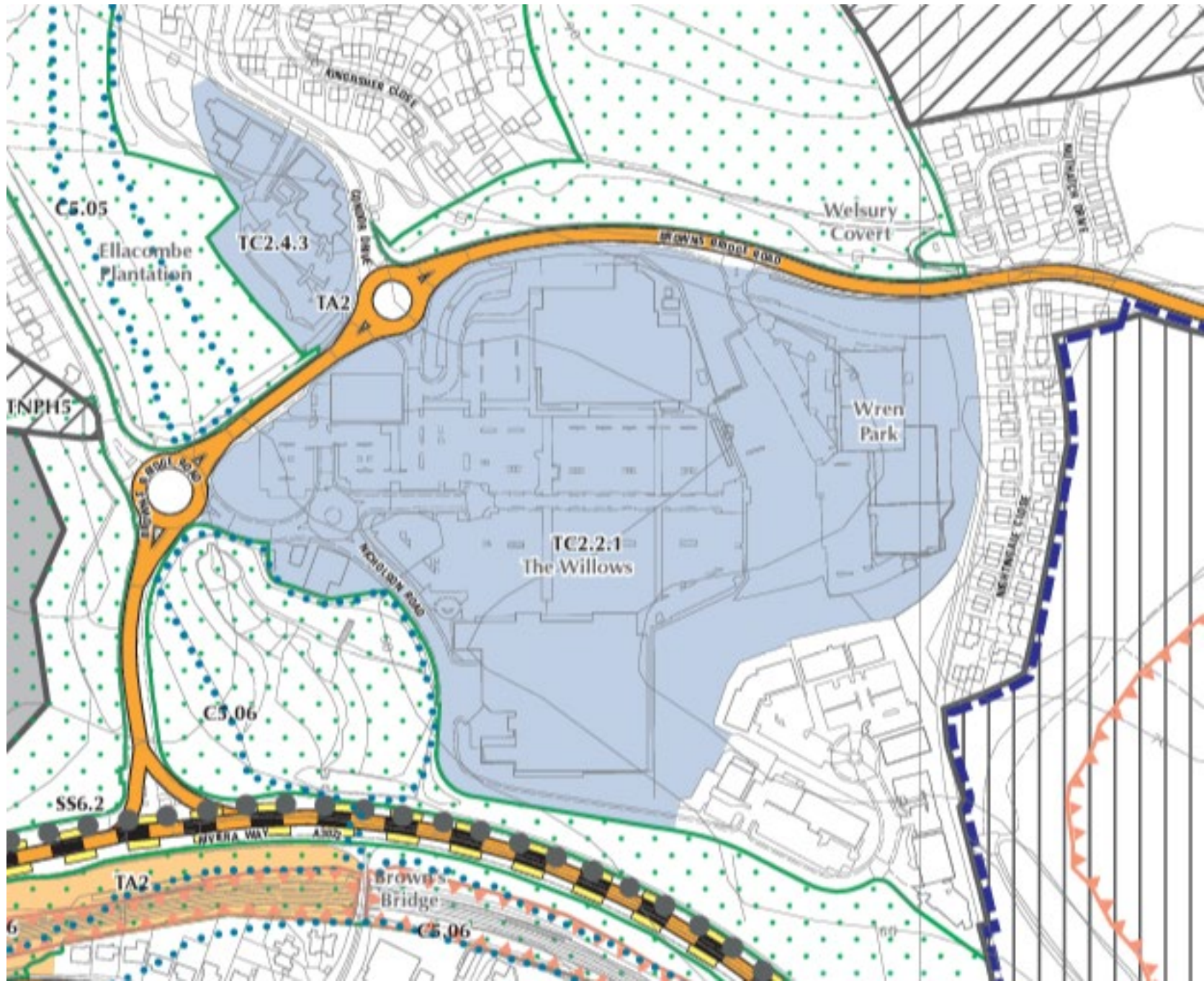
Appendix XIII

Brixham Town Centre Primary and Secondary Retail
Frontages



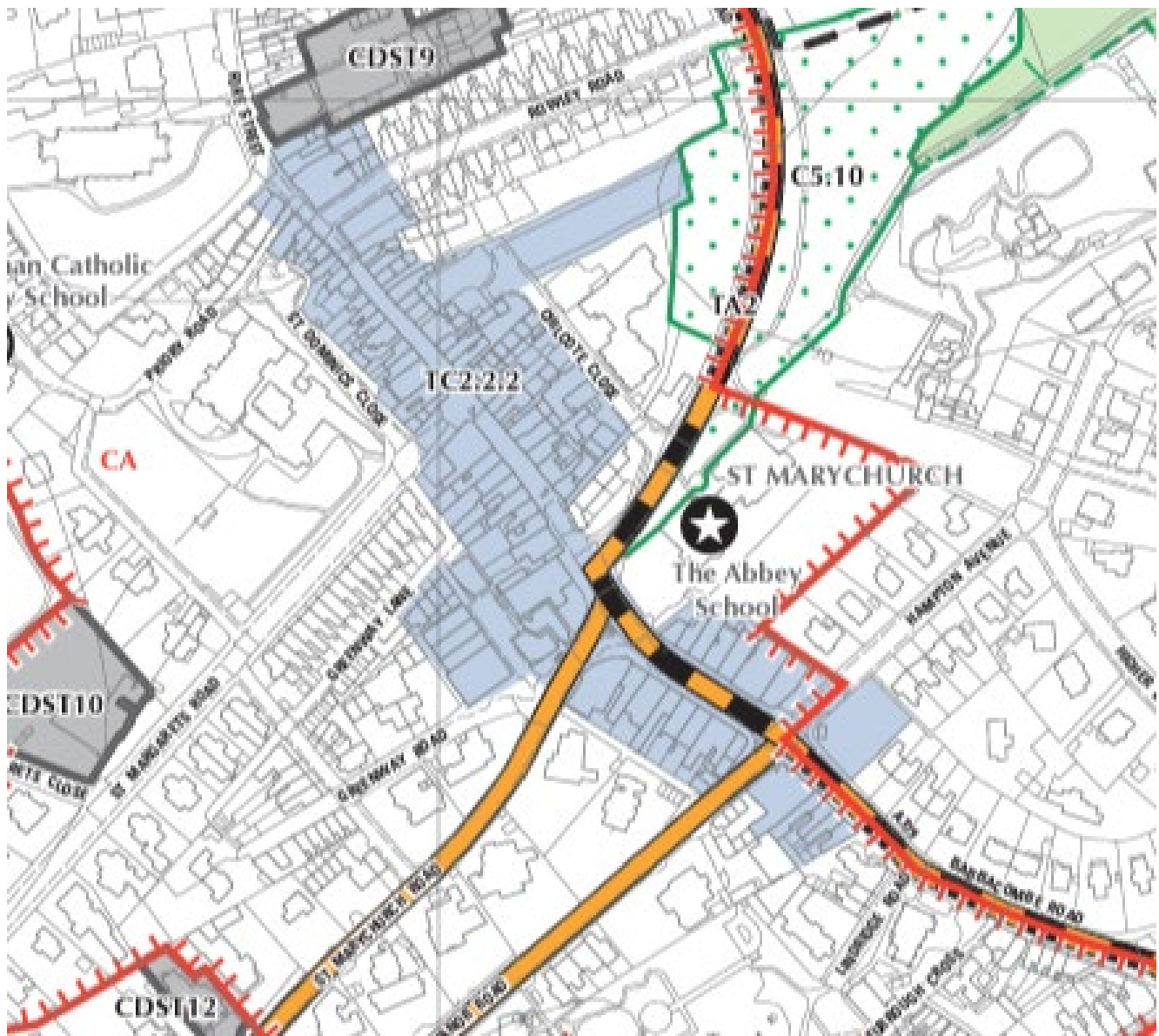
Appendix XIV

The Willows District Centre



Appendix XV

St Marychurch District Centre



Appendix XVI

Preston District Centre



Appendix XVII

Quantitative Need Assessment

TABLE 1: POPULATION WITHIN STUDY AREA, BY ZONE

YEAR	ZONE						
	2	3	4	5	6	7	8
2022	37258	20184	51681	70400	59344	25247	32930
2027	38696	20716	53177	72351	62298	26501	34208
2032	39791	21048	54316	74338	64964	27491	35228
2040	41074	21489	55843	77237	68710	28864	36314
Change, 2022-2027	1438	532	1496	1951	2954	1254	1278
%	3.9%	2.6%	2.9%	2.8%	5.0%	5.0%	3.9%
Chanhe, 2022-2030	2109	757	2241	3127	4564	1901	1945
%	5.7%	3.8%	4.3%	4.4%	7.7%	7.5%	5.9%
Change, 2022-2035	3028	1063	3268	4970	7106	2777	2747
%	8.1%	5.3%	6.3%	7.1%	12.0%	11.0%	8.3%
Change, 2022-2040	3816	1305	4162	6837	9366	3617	3384
%	10.2%	6.5%	8.1%	9.7%	15.8%	14.3%	10.3%

Notes: population data provided by Experian (April 2022)

TABLE 2a: PER CAPITA RETAIL EXPENDITURE WITHIN STUDY AREA, BY ZONE, 2022

YEAR	ZONE						
	2	3	4	5	6	7	8
Convenience goods	£2,675	£2,453	£2,396	£2,415	£2,449	£2,676	£2,524
Clothing and Footwear	£707	£653	£648	£631	£693	£696	£693
Clothing materials and garments per Person	£599	£558	£554	£543	£596	£583	£596
Shoes and other footwear per Person	£108	£95	£94	£88	£97	£113	£97
Furniture, Floorcoverings, Household Textiles	£537	£498	£485	£478	£524	£530	£530
Furniture and furnishings; carpets and other floor cov	£422	£394	£377	£368	£413	£417	£420
Household textiles per Person	£115	£105	£108	£110	£111	£113	£111
DIY and Garden Goods	£388	£314	£283	£271	£311	£392	£313
10% of Non-Durable household goods per Person	£12	£10	£10	£10	£11	£12	£11
Gardens, plants and flowers per Person	£140	£97	£88	£84	£104	£149	£106
Major tools and equipment per Person	£23	£18	£15	£13	£17	£26	£17
Materials for maintenance and repair of the dwelling p	£40	£37	£32	£30	£33	£39	£33
Small tools and miscellaneous accessories per Person	£172	£152	£138	£134	£147	£166	£146
Domestic Appliances	£207	£129	£125	£120	£159	£241	£141
Major household appliances (electric or not) per Perso	£207	£129	£125	£120	£159	£241	£141
Smaller Electrical Goods	£210	£196	£190	£182	£199	£215	£188
Audio-visual, photographic and information processin	£178	£172	£166	£159	£173	£182	£163
Small electrical household appliances per Person	£32	£23	£24	£23	£26	£32	£26
Health, Beauty China & Glass Goods	£768	£691	£681	£707	£727	£754	£750
Appliances for personal care per Person	£313	£285	£295	£304	£312	£306	£313
Glassware, tableware and household utensils per Pers	£111	£92	£93	£98	£101	£107	£103
Jewellery, clocks and watches per Person	£88	£74	£78	£86	£85	£90	£84
Medical goods and other pharmaceutical products per	£195	£181	£167	£173	£174	£185	£192
Therapeutic appliances and equipment per Person	£61	£58	£49	£45	£55	£66	£58
Recreational Goods	£949	£775	£743	£708	£819	£1,021	£783
Bicycles per Person	£109	£60	£59	£55	£73	£131	£70
Books and stationery per Person	£148	£120	£113	£116	£125	£146	£129
Games, toys and hobbies; sport and camping; musical	£371	£337	£322	£298	£337	£393	£319
Recording media per Person	£103	£95	£100	£97	£111	£118	£101
Pets and related products per Person	£182	£133	£120	£110	£141	£200	£131
Other personal effects per Person	£35	£30	£31	£32	£32	£34	£32
Food & Beverage	£1,053	£950	£910	£918	£982	£1,061	£985

Notes:

Per capita expenditure at a 2020 base provided by Experian.

Projected forward using forecasts contained with Experian's Retail Planner Briefing Note 19 (2022).

TABLE 2b: PER CAPITA RETAIL EXPENDITURE WITHIN STUDY AREA, BY ZONE, 2027

YEAR	ZONE						
	2	3	4	5	6	7	8
Convenience goods	£2,621	£2,403	£2,348	£2,366	£2,399	£2,622	£2,473
Clothing and Footwear	£761	£702	£698	£679	£746	£749	£746
Clothing materials and garments per Person	£645	£600	£597	£584	£641	£628	£641
Shoes and other footwear per Person	£116	£102	£101	£95	£105	£122	£105
Furniture, Floorcoverings, Household Textiles	£578	£536	£522	£514	£564	£570	£571
Furniture and furnishings; carpets and other floor cov	£455	£424	£406	£396	£445	£448	£452
Household textiles per Person	£123	£113	£116	£118	£119	£122	£119
DIY and Garden Goods	£417	£338	£305	£291	£335	£422	£337
10% of Non-Durable household goods per Person	£12	£11	£11	£11	£12	£12	£12
Gardens, plants and flowers per Person	£151	£105	£95	£91	£112	£161	£114
Major tools and equipment per Person	£25	£20	£16	£14	£18	£28	£19
Materials for maintenance and repair of the dwelling p	£44	£40	£35	£32	£36	£42	£36
Small tools and miscellaneous accessories per Person	£186	£163	£148	£144	£158	£178	£157
Domestic Appliances	£223	£139	£135	£129	£171	£259	£152
Major household appliances (electric or not) per Perso	£223	£139	£135	£129	£171	£259	£152
Smaller Electrical Goods	£226	£210	£204	£196	£214	£231	£202
Audio-visual, photographic and information processin	£192	£186	£178	£171	£186	£196	£175
Small electrical household appliances per Person	£35	£25	£26	£25	£28	£35	£28
Health, Beauty China & Glass Goods	£827	£743	£733	£761	£782	£812	£807
Appliances for personal care per Person	£337	£307	£317	£328	£336	£329	£337
Glassware, tableware and household utensils per Pers	£120	£99	£100	£106	£108	£115	£111
Jewellery, clocks and watches per Person	£95	£80	£83	£92	£91	£97	£91
Medical goods and other pharmaceutical products per	£210	£194	£179	£186	£187	£199	£207
Therapeutic appliances and equipment per Person	£66	£62	£52	£49	£59	£71	£62
Recreational Goods	£1,021	£834	£800	£762	£882	£1,099	£843
Bicycles per Person	£117	£65	£63	£59	£79	£141	£75
Books and stationery per Person	£159	£129	£122	£125	£135	£157	£139
Games, toys and hobbies; sport and camping; musical	£400	£363	£346	£321	£362	£423	£344
Recording media per Person	£111	£102	£107	£104	£119	£127	£109
Pets and related products per Person	£196	£143	£129	£118	£152	£215	£141
Other personal effects per Person	£38	£32	£33	£35	£35	£36	£35
Food & Beverage	£1,221	£1,101	£1,055	£1,064	£1,139	£1,230	£1,141

Notes:

Per capita expenditure at a 2020 base provided by Experian.

Projected forward using forecasts contained with Experian's Retail Planner Briefing Note 19 (2022).

TABLE 2c: PER CAPITA RETAIL EXPENDITURE WITHIN STUDY AREA, BY ZONE, 2032

YEAR	ZONE						
	2	3	4	5	6	7	8
Convenience goods	£2,615	£2,397	£2,342	£2,360	£2,393	£2,616	£2,467
Clothing and Footwear	£851	£785	£780	£760	£834	£838	£834
Clothing materials and garments per Person	£721	£671	£667	£653	£717	£702	£717
Shoes and other footwear per Person	£130	£114	£113	£106	£117	£136	£117
Furniture, Floorcoverings, Household Textiles	£646	£600	£584	£575	£631	£638	£638
Furniture and furnishings; carpets and other floor cov	£508	£474	£454	£443	£497	£501	£505
Household textiles per Person	£138	£126	£130	£132	£133	£136	£133
DIY and Garden Goods	£467	£378	£341	£326	£374	£472	£376
10% of Non-Durable household goods per Person	£14	£12	£12	£12	£13	£14	£13
Gardens, plants and flowers per Person	£169	£117	£106	£101	£125	£180	£127
Major tools and equipment per Person	£28	£22	£18	£16	£20	£32	£21
Materials for maintenance and repair of the dwelling p	£49	£45	£39	£36	£40	£47	£40
Small tools and miscellaneous accessories per Person	£208	£183	£166	£161	£177	£200	£176
Domestic Appliances	£249	£155	£151	£144	£192	£290	£170
Major household appliances (electric or not) per Perso	£249	£155	£151	£144	£192	£290	£170
Smaller Electrical Goods	£253	£235	£228	£219	£239	£258	£226
Audio-visual, photographic and information processin	£214	£208	£200	£192	£209	£219	£196
Small electrical household appliances per Person	£39	£28	£29	£28	£31	£39	£31
Health, Beauty China & Glass Goods	£924	£831	£819	£851	£875	£908	£903
Appliances for personal care per Person	£376	£344	£355	£366	£375	£368	£376
Glassware, tableware and household utensils per Pers	£134	£111	£112	£118	£121	£129	£124
Jewellery, clocks and watches per Person	£106	£89	£93	£103	£102	£108	£101
Medical goods and other pharmaceutical products per	£234	£217	£201	£209	£210	£222	£231
Therapeutic appliances and equipment per Person	£73	£70	£59	£55	£67	£79	£70
Recreational Goods	£1,142	£932	£895	£852	£986	£1,229	£942
Bicycles per Person	£131	£72	£71	£67	£88	£158	£84
Books and stationery per Person	£178	£144	£136	£140	£151	£176	£155
Games, toys and hobbies; sport and camping; musical	£447	£406	£387	£358	£405	£473	£384
Recording media per Person	£124	£114	£120	£116	£133	£142	£122
Pets and related products per Person	£219	£160	£144	£132	£170	£240	£158
Other personal effects per Person	£43	£36	£37	£39	£39	£41	£39
Food & Beverage	£1,416	£1,276	£1,223	£1,233	£1,320	£1,426	£1,323

Notes:

Per capita expenditure at a 2020 base provided by Experian.

Projected forward using forecasts contained with Experian's Retail Planner Briefing Note 19 (2022).

TABLE 2d: PER CAPITA RETAIL EXPENDITURE WITHIN STUDY AREA, BY ZONE, 2040

YEAR	ZONE						
	2	3	4	5	6	7	8
Convenience goods	£2,615	£2,397	£2,342	£2,360	£2,393	£2,616	£2,467
Clothing and Footwear	£1,024	£945	£939	£914	£1,004	£1,009	£1,004
Clothing materials and garments per Person	£868	£808	£803	£786	£863	£845	£863
Shoes and other footwear per Person	£157	£137	£136	£128	£141	£164	£141
Furniture, Floorcoverings, Household Textiles	£778	£722	£703	£692	£759	£767	£768
Furniture and furnishings; carpets and other floor cov	£612	£570	£546	£533	£599	£603	£608
Household textiles per Person	£166	£152	£157	£159	£160	£164	£160
DIY and Garden Goods	£562	£455	£410	£392	£451	£568	£453
10% of Non-Durable household goods per Person	£17	£14	£14	£14	£16	£17	£16
Gardens, plants and flowers per Person	£203	£141	£128	£122	£151	£216	£153
Major tools and equipment per Person	£33	£26	£22	£19	£24	£38	£25
Materials for maintenance and repair of the dwelling p	£59	£54	£47	£43	£48	£56	£48
Small tools and miscellaneous accessories per Person	£250	£220	£200	£194	£213	£240	£212
Domestic Appliances	£300	£186	£182	£173	£231	£349	£204
Major household appliances (electric or not) per Perso	£300	£186	£182	£173	£231	£349	£204
Smaller Electrical Goods	£305	£283	£275	£264	£288	£311	£272
Audio-visual, photographic and information processin	£258	£250	£240	£231	£251	£264	£235
Small electrical household appliances per Person	£47	£33	£35	£33	£37	£47	£37
Health, Beauty China & Glass Goods	£1,113	£1,000	£986	£1,024	£1,053	£1,092	£1,086
Appliances for personal care per Person	£453	£413	£427	£441	£452	£443	£453
Glassware, tableware and household utensils per Pers	£161	£134	£135	£142	£146	£155	£149
Jewellery, clocks and watches per Person	£128	£108	£112	£124	£123	£130	£122
Medical goods and other pharmaceutical products per	£282	£262	£241	£251	£252	£268	£278
Therapeutic appliances and equipment per Person	£88	£84	£71	£66	£80	£96	£84
Recreational Goods	£1,374	£1,122	£1,077	£1,025	£1,187	£1,479	£1,134
Bicycles per Person	£158	£87	£85	£80	£106	£190	£102
Books and stationery per Person	£214	£173	£164	£168	£182	£212	£186
Games, toys and hobbies; sport and camping; musical	£538	£489	£466	£431	£488	£569	£462
Recording media per Person	£149	£137	£145	£140	£160	£171	£147
Pets and related products per Person	£264	£192	£173	£159	£204	£289	£190
Other personal effects per Person	£51	£43	£44	£47	£47	£49	£47
Food & Beverage	£1,641	£1,479	£1,418	£1,430	£1,531	£1,653	£1,534

Notes:

Per capita expenditure at a 2020 base provided by Experian.

Projected forward using forecasts contained with Experian's Retail Planner Briefing Note 19 (2022).

TABLE 3a: TOTAL RETAIL EXPENDITURE WITHIN STUDY AREA, BY ZONE, 2022

YEAR	ZONE						
	2	3	4	5	6	7	8
Convenience goods	£99.7	£49.5	£123.9	£170.0	£145.3	£67.6	£83.1
Clothing and Footwear	£26.3	£13.2	£33.5	£44.4	£41.1	£17.6	£22.8
Clothing materials and garments per Person	£22.3	£11.3	£28.7	£38.2	£35.3	£14.7	£19.6
Shoes and other footwear per Person	£4.0	£1.9	£4.9	£6.2	£5.8	£2.9	£3.2
Furniture, Floorcoverings, Household Textiles	£20.0	£10.1	£25.1	£33.6	£31.1	£13.4	£17.5
Furniture and furnishings; carpets and other floor cov	£15.7	£7.9	£19.5	£25.9	£24.5	£10.5	£13.8
Household textiles per Person	£4.3	£2.1	£5.6	£7.7	£6.6	£2.9	£3.6
DIY and Garden Goods	£14.4	£6.3	£14.6	£19.1	£18.5	£9.9	£10.3
10% of Non-Durable household goods per Person	£0.4	£0.2	£0.5	£0.7	£0.6	£0.3	£0.4
Gardens, plants and flowers per Person	£5.2	£2.0	£4.6	£5.9	£6.2	£3.8	£3.5
Major tools and equipment per Person	£0.9	£0.4	£0.8	£0.9	£1.0	£0.7	£0.6
Materials for maintenance and repair of the dwelling p	£1.5	£0.7	£1.7	£2.1	£2.0	£1.0	£1.1
Small tools and miscellaneous accessories per Person	£6.4	£3.1	£7.1	£9.4	£8.7	£4.2	£4.8
Domestic Appliances	£7.7	£2.6	£6.5	£8.4	£9.4	£6.1	£4.6
Major household appliances (electric or not) per Perso	£7.7	£2.6	£6.5	£8.4	£9.4	£6.1	£4.6
Smaller Electrical Goods	£7.8	£3.9	£9.8	£12.8	£11.8	£5.4	£6.2
Audio-visual, photographic and information processin	£6.6	£3.5	£8.6	£11.2	£10.3	£4.6	£5.4
Small electrical household appliances per Person	£1.2	£0.5	£1.2	£1.6	£1.5	£0.8	£0.8
Health, Beauty China & Glass Goods	£28.6	£13.9	£35.2	£49.8	£43.1	£19.0	£24.7
Appliances for personal care per Person	£11.6	£5.8	£15.2	£21.4	£18.5	£7.7	£10.3
Glassware, tableware and household utensils per Pers	£4.1	£1.9	£4.8	£6.9	£6.0	£2.7	£3.4
Jewellery, clocks and watches per Person	£3.3	£1.5	£4.0	£6.0	£5.0	£2.3	£2.8
Medical goods and other pharmaceutical products per	£7.3	£3.6	£8.6	£12.2	£10.3	£4.7	£6.3
Therapeutic appliances and equipment per Person	£2.3	£1.2	£2.5	£3.2	£3.3	£1.7	£1.9
Recreational Goods	£35.3	£15.6	£38.4	£49.8	£48.6	£25.8	£25.8
Bicycles per Person	£4.1	£1.2	£3.0	£3.9	£4.4	£3.3	£2.3
Books and stationery per Person	£5.5	£2.4	£5.8	£8.2	£7.4	£3.7	£4.2
Games, toys and hobbies; sport and camping; musical	£13.8	£6.8	£16.6	£21.0	£20.0	£9.9	£10.5
Recording media per Person	£3.8	£1.9	£5.2	£6.8	£6.6	£3.0	£3.3
Pets and related products per Person	£6.8	£2.7	£6.2	£7.7	£8.4	£5.0	£4.3
Other personal effects per Person	£1.3	£0.6	£1.6	£2.3	£1.9	£0.9	£1.1
Food & Beverage	£39.3	£19.2	£47.0	£64.6	£58.3	£26.8	£32.4

Notes:

Per capita expenditure at a 2020 base provided by Experian.

Projected forward using forecasts contained with Experian's Retail Planner Briefing Note 19 (2022).

TABLE 3b: TOTAL RETAIL EXPENDITURE WITHIN STUDY AREA, BY ZONE, 2027

YEAR	ZONE						
	2	3	4	5	6	7	8
Convenience goods	£101.4	£49.8	£124.8	£171.2	£149.4	£69.5	£84.6
Clothing and Footwear	£29.4	£14.6	£37.1	£49.1	£46.5	£19.9	£25.5
Clothing materials and garments per Person	£24.9	£12.4	£31.7	£42.3	£39.9	£16.6	£21.9
Shoes and other footwear per Person	£4.5	£2.1	£5.4	£6.9	£6.5	£3.2	£3.6
Furniture, Floorcoverings, Household Textiles	£22.4	£11.1	£27.8	£37.2	£35.1	£15.1	£19.5
Furniture and furnishings; carpets and other floor cov	£17.6	£8.8	£21.6	£28.7	£27.7	£11.9	£15.5
Household textiles per Person	£4.8	£2.3	£6.2	£8.5	£7.4	£3.2	£4.1
DIY and Garden Goods	£16.2	£7.0	£16.2	£21.1	£20.9	£11.2	£11.5
10% of Non-Durable household goods per Person	£0.5	£0.2	£0.6	£0.8	£0.7	£0.3	£0.4
Gardens, plants and flowers per Person	£5.8	£2.2	£5.1	£6.6	£7.0	£4.3	£3.9
Major tools and equipment per Person	£1.0	£0.4	£0.8	£1.0	£1.1	£0.8	£0.6
Materials for maintenance and repair of the dwelling p	£1.7	£0.8	£1.8	£2.3	£2.2	£1.1	£1.2
Small tools and miscellaneous accessories per Person	£7.2	£3.4	£7.9	£10.4	£9.8	£4.7	£5.4
Domestic Appliances	£8.6	£2.9	£7.2	£9.3	£10.7	£6.9	£5.2
Major household appliances (electric or not) per Perso	£8.6	£2.9	£7.2	£9.3	£10.7	£6.9	£5.2
Smaller Electrical Goods	£8.8	£4.4	£10.9	£14.2	£13.3	£6.1	£6.9
Audio-visual, photographic and information processin	£7.4	£3.8	£9.5	£12.4	£11.6	£5.2	£6.0
Small electrical household appliances per Person	£1.3	£0.5	£1.4	£1.8	£1.7	£0.9	£0.9
Health, Beauty China & Glass Goods	£32.0	£15.4	£39.0	£55.1	£48.7	£21.5	£27.6
Appliances for personal care per Person	£13.0	£6.4	£16.9	£23.7	£20.9	£8.7	£11.5
Glassware, tableware and household utensils per Pers	£4.6	£2.1	£5.3	£7.6	£6.7	£3.1	£3.8
Jewellery, clocks and watches per Person	£3.7	£1.7	£4.4	£6.7	£5.7	£2.6	£3.1
Medical goods and other pharmaceutical products per	£8.1	£4.0	£9.5	£13.5	£11.7	£5.3	£7.1
Therapeutic appliances and equipment per Person	£2.5	£1.3	£2.8	£3.5	£3.7	£1.9	£2.1
Recreational Goods	£39.5	£17.3	£42.5	£55.1	£54.9	£29.1	£28.8
Bicycles per Person	£4.5	£1.3	£3.4	£4.3	£4.9	£3.7	£2.6
Books and stationery per Person	£6.2	£2.7	£6.5	£9.1	£8.4	£4.2	£4.7
Games, toys and hobbies; sport and camping; musical	£15.5	£7.5	£18.4	£23.2	£22.6	£11.2	£11.8
Recording media per Person	£4.3	£2.1	£5.7	£7.5	£7.4	£3.4	£3.7
Pets and related products per Person	£7.6	£3.0	£6.8	£8.5	£9.5	£5.7	£4.8
Other personal effects per Person	£1.5	£0.7	£1.7	£2.5	£2.2	£1.0	£1.2
Food & Beverage	£47.3	£22.8	£56.1	£77.0	£70.9	£32.6	£39.0

Notes:

Per capita expenditure at a 2020 base provided by Experian.

Projected forward using forecasts contained with Experian's Retail Planner Briefing Note 19 (2022).

TABLE 3c: TOTAL RETAIL EXPENDITURE WITHIN STUDY AREA, BY ZONE, 2032

YEAR	ZONE						
	2	3	4	5	6	7	8
Convenience goods	£104.0	£50.5	£127.2	£175.5	£155.5	£71.9	£86.9
Clothing and Footwear	£33.9	£16.5	£42.4	£56.5	£54.2	£23.0	£29.4
Clothing materials and garments per Person	£28.7	£14.1	£36.2	£48.6	£46.6	£19.3	£25.3
Shoes and other footwear per Person	£5.2	£2.4	£6.1	£7.9	£7.6	£3.7	£4.1
Furniture, Floorcoverings, Household Textiles	£25.7	£12.6	£31.7	£42.7	£41.0	£17.5	£22.5
Furniture and furnishings; carpets and other floor cov	£20.2	£10.0	£24.6	£32.9	£32.3	£13.8	£17.8
Household textiles per Person	£5.5	£2.7	£7.1	£9.8	£8.6	£3.7	£4.7
DIY and Garden Goods	£18.6	£8.0	£18.5	£24.2	£24.3	£13.0	£13.3
10% of Non-Durable household goods per Person	£0.6	£0.3	£0.6	£0.9	£0.8	£0.4	£0.5
Gardens, plants and flowers per Person	£6.7	£2.5	£5.8	£7.5	£8.1	£4.9	£4.5
Major tools and equipment per Person	£1.1	£0.5	£1.0	£1.2	£1.3	£0.9	£0.7
Materials for maintenance and repair of the dwelling p	£1.9	£0.9	£2.1	£2.7	£2.6	£1.3	£1.4
Small tools and miscellaneous accessories per Person	£8.3	£3.8	£9.0	£12.0	£11.5	£5.5	£6.2
Domestic Appliances	£9.9	£3.3	£8.2	£10.7	£12.5	£8.0	£6.0
Major household appliances (electric or not) per Perso	£9.9	£3.3	£8.2	£10.7	£12.5	£8.0	£6.0
Smaller Electrical Goods	£10.1	£5.0	£12.4	£16.3	£15.5	£7.1	£8.0
Audio-visual, photographic and information processin	£8.5	£4.4	£10.8	£14.2	£13.5	£6.0	£6.9
Small electrical household appliances per Person	£1.5	£0.6	£1.6	£2.1	£2.0	£1.1	£1.1
Health, Beauty China & Glass Goods	£36.8	£17.5	£44.5	£63.3	£56.8	£25.0	£31.8
Appliances for personal care per Person	£15.0	£7.2	£19.3	£27.2	£24.4	£10.1	£13.3
Glassware, tableware and household utensils per Pers	£5.3	£2.3	£6.1	£8.8	£7.9	£3.5	£4.4
Jewellery, clocks and watches per Person	£4.2	£1.9	£5.1	£7.7	£6.6	£3.0	£3.6
Medical goods and other pharmaceutical products per	£9.3	£4.6	£10.9	£15.5	£13.6	£6.1	£8.2
Therapeutic appliances and equipment per Person	£2.9	£1.5	£3.2	£4.1	£4.3	£2.2	£2.4
Recreational Goods	£45.4	£19.6	£48.6	£63.3	£64.1	£33.8	£33.2
Bicycles per Person	£5.2	£1.5	£3.8	£4.9	£5.7	£4.3	£3.0
Books and stationery per Person	£7.1	£3.0	£7.4	£10.4	£9.8	£4.8	£5.5
Games, toys and hobbies; sport and camping; musical	£17.8	£8.5	£21.0	£26.6	£26.3	£13.0	£13.5
Recording media per Person	£4.9	£2.4	£6.5	£8.6	£8.6	£3.9	£4.3
Pets and related products per Person	£8.7	£3.4	£7.8	£9.8	£11.0	£6.6	£5.6
Other personal effects per Person	£1.7	£0.8	£2.0	£2.9	£2.5	£1.1	£1.4
Food & Beverage	£56.3	£26.9	£66.4	£91.7	£85.8	£39.2	£46.6

Notes:

Per capita expenditure at a 2020 base provided by Experian.

Projected forward using forecasts contained with Experian's Retail Planner Briefing Note 19 (2022).

TABLE 3d: TOTAL RETAIL EXPENDITURE WITHIN STUDY AREA, BY ZONE, 2040

YEAR	ZONE						
	2	3	4	5	6	7	8
Convenience goods	£107.4	£51.5	£130.8	£182.3	£164.4	£75.5	£89.6
Clothing and Footwear	£42.1	£20.3	£52.5	£70.6	£69.0	£29.1	£36.5
Clothing materials and garments per Person	£35.6	£17.4	£44.8	£60.7	£59.3	£24.4	£31.3
Shoes and other footwear per Person	£6.4	£3.0	£7.6	£9.9	£9.7	£4.7	£5.1
Furniture, Floorcoverings, Household Textiles	£32.0	£15.5	£39.2	£53.4	£52.1	£22.1	£27.9
Furniture and furnishings; carpets and other floor cov	£25.1	£12.2	£30.5	£41.2	£41.1	£17.4	£22.1
Household textiles per Person	£6.8	£3.3	£8.7	£12.3	£11.0	£4.7	£5.8
DIY and Garden Goods	£23.1	£9.8	£22.9	£30.3	£31.0	£16.4	£16.4
10% of Non-Durable household goods per Person	£0.7	£0.3	£0.8	£1.1	£1.1	£0.5	£0.6
Gardens, plants and flowers per Person	£8.3	£3.0	£7.1	£9.4	£10.3	£6.2	£5.6
Major tools and equipment per Person	£1.4	£0.6	£1.2	£1.5	£1.6	£1.1	£0.9
Materials for maintenance and repair of the dwelling p	£2.4	£1.2	£2.6	£3.3	£3.3	£1.6	£1.7
Small tools and miscellaneous accessories per Person	£10.3	£4.7	£11.1	£15.0	£14.6	£6.9	£7.7
Domestic Appliances	£12.3	£4.0	£10.1	£13.4	£15.8	£10.1	£7.4
Major household appliances (electric or not) per Perso	£12.3	£4.0	£10.1	£13.4	£15.8	£10.1	£7.4
Smaller Electrical Goods	£12.5	£6.1	£15.3	£20.4	£19.8	£9.0	£9.9
Audio-visual, photographic and information processin	£10.6	£5.4	£13.4	£17.8	£17.2	£7.6	£8.5
Small electrical household appliances per Person	£1.9	£0.7	£1.9	£2.6	£2.5	£1.3	£1.3
Health, Beauty China & Glass Goods	£45.7	£21.5	£55.1	£79.1	£72.3	£31.5	£39.4
Appliances for personal care per Person	£18.6	£8.9	£23.8	£34.1	£31.0	£12.8	£16.4
Glassware, tableware and household utensils per Pers	£6.6	£2.9	£7.5	£11.0	£10.0	£4.5	£5.4
Jewellery, clocks and watches per Person	£5.3	£2.3	£6.3	£9.6	£8.5	£3.8	£4.4
Medical goods and other pharmaceutical products per	£11.6	£5.6	£13.5	£19.4	£17.3	£7.7	£10.1
Therapeutic appliances and equipment per Person	£3.6	£1.8	£3.9	£5.1	£5.5	£2.8	£3.0
Recreational Goods	£56.4	£24.1	£60.1	£79.2	£81.5	£42.7	£41.2
Bicycles per Person	£6.5	£1.9	£4.7	£6.2	£7.3	£5.5	£3.7
Books and stationery per Person	£8.8	£3.7	£9.1	£13.0	£12.5	£6.1	£6.8
Games, toys and hobbies; sport and camping; musical	£22.1	£10.5	£26.0	£33.3	£33.5	£16.4	£16.8
Recording media per Person	£6.1	£3.0	£8.1	£10.8	£11.0	£4.9	£5.3
Pets and related products per Person	£10.8	£4.1	£9.7	£12.3	£14.0	£8.3	£6.9
Other personal effects per Person	£2.1	£0.9	£2.5	£3.6	£3.2	£1.4	£1.7
Food & Beverage	£67.4	£31.8	£79.2	£110.4	£105.2	£47.7	£55.7

Notes:

Per capita expenditure at a 2020 base provided by Experian.

Projected forward using forecasts contained with Experian's Retail Planner Briefing Note 19 (2022).

TABLE 4: MARKET SHARE OF CONVENIENCE GOODS DESTINATIONS, BY ZONE

STORE / CENTRE	FIRST CHOICE MAIN FOOD							SECOND CHOICE MAIN FOOD							FIRST CHOICE TOP-UP							SECOND CHOICE TOP-UP						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8	2	3	4	5	6	7	8	2	3	4	5	6	7	8
TORQUAY TOWN CENTRE																												
Iceland, Union Square Shopping Centre, Torquay	0.00%	0.00%	0.00%	0.64%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.07%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.86%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.34%	0.00%	0.00%	0.00%
Tesco Express, Fleet Street, Torquay Town Centre	0.65%	0.00%	0.00%	3.23%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.52%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4.22%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.04%	0.00%	0.00%	0.00%
Torquay TOWN CENTRE	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.63%	1.35%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.05%	0.00%	0.00%	0.00%
THE WILLOWS DISTRICT CENTRE																												
Marks & Spencer, The Willows, Torquay	0.00%	1.73%	1.72%	2.67%	0.93%	0.00%	2.04%	0.00%	0.79%	4.50%	7.50%	4.86%	0.00%	4.59%	0.00%	1.49%	1.83%	2.49%	0.00%	0.00%	0.00%	2.44%	2.42%	0.00%	4.76%	5.15%	0.00%	3.74%
Sainsburys Superstore, Nicholson Road, The Willows, Torquay	0.00%	0.00%	5.23%	24.33%	3.45%	0.82%	0.80%	4.64%	1.23%	5.44%	26.43%	1.67%	3.22%	0.00%	0.00%	0.00%	0.00%	3.68%	0.00%	0.00%	0.00%	0.00%	0.00%	0.93%	10.05%	4.74%	0.00%	0.00%
The Willows Local Centre, Torquay	0.00%	0.00%	0.34%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.58%	0.00%	0.76%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
ST MARYCHURCH DISTRICT CENTRE																												
Co-op, Fore Street, St Marychurch, Torquay	0.00%	0.00%	0.00%	0.82%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4.31%	0.00%	1.74%	0.00%	0.00%	0.00%	0.00%	5.07%	0.00%	0.00%	0.00%
Sainsburys Local, St Marychurch, Torquay, TQ1 4LY	0.00%	0.00%	0.86%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.84%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.89%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	6.78%	0.00%	0.00%	0.00%
Tesco Express, Babacombe Road, Torquay	0.00%	0.00%	0.00%	0.82%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.22%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	6.77%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.09%	0.00%	0.00%	0.00%
St Marychurch Local Centre, Torquay	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.30%	0.52%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.27%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
LOCAL RETAIL PROVISION																												
	0.65%	0.00%	0.67%	10.67%	0.00%	0.82%	0.00%	0.00%	0.00%	2.65%	8.47%	0.00%	0.00%	0.00%	1.82%	0.00%	9.73%	48.30%	0.00%	0.00%	0.00%	0.00%	0.00%	3.31%	35.13%	0.00%	0.00%	0.00%
OUT OF CENTRE STORES																												
Asda, Newton Road, Torquay	1.59%	0.00%	2.91%	21.94%	0.00%	0.00%	0.00%	0.00%	1.85%	1.36%	17.24%	2.51%	0.00%	1.06%	0.00%	0.00%	1.03%	11.63%	3.12%	0.00%	0.94%	0.00%	3.97%	0.00%	5.44%	0.00%	0.00%	0.00%
Lidl, Newton Road, Torquay	0.00%	0.00%	3.17%	14.88%	2.92%	0.00%	0.00%	3.38%	0.00%	0.53%	14.94%	0.00%	0.00%	0.00%	0.00%	1.48%	1.61%	4.13%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.43%	0.00%	0.00%	1.87%
PAIGNTON TOWN CENTRE																												
Co-op, Winner Street / Palace Avenue, Paignton	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.53%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.77%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.72%	0.00%	0.00%	0.00%	0.00%
Iceland, Victoria Street, Paignton	0.00%	0.49%	1.87%	0.00%	0.00%	0.00%	0.00%	0.00%	0.79%	2.72%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.64%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	7.25%	0.00%	0.00%	0.00%	0.00%
Lidl, Victoria Centre, Paignton	1.66%	2.70%	5.90%	0.00%	0.00%	0.00%	0.00%	0.00%	2.36%	4.14%	0.00%	0.00%	0.00%	0.00%	1.75%	0.58%	3.50%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	11.49%	0.00%	0.00%	0.00%	0.00%
Tesco Express, Victoria Street, Paignton	0.00%	0.49%	0.34%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.36%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4.54%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.38%	0.00%	0.00%	0.00%	0.00%
Paignton TOWN CENTRE	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.79%	0.53%	0.00%	0.00%	0.00%	0.00%	0.00%	0.91%	2.19%	0.00%	0.00%	0.00%	0.00%	0.00%	1.55%	3.83%	0.00%	0.00%	0.00%	0.00%
PRESTON DISTRICT CENTRE																												
Sainsburys Local, Torquay Road, Preston, Paignton	0.00%	7.13%	3.25%	0.00%	0.00%	0.00%	0.00%	0.00%	4.56%	1.89%	0.00%	0.00%	0.00%	0.00%	0.00%	1.49%	9.06%	0.59%	0.00%	0.00%	0.00%	0.00%	3.65%	7.68%	0.00%	0.00%	0.00%	0.00%
Spar, Torquay Road, Preston, Paignton	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.58%	0.95%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.93%	0.00%	0.00%	0.00%	0.00%
Tesco Express, Concord House, Paignton	0.00%	0.00%	0.34%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.54%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.16%	0.00%	0.00%	0.00%	0.00%	0.00%	1.55%	10.88%	0.00%	0.00%	0.00%	0.00%
Post Office, Preston Down Road, Paignton, TQ3 1DS	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.40%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
LOCAL RETAIL PROVISION																												
Aldi, Brixham Road, Paignton	0.00%	17.14%	13.59%	2.60%	0.00%	0.00%	0.00%	0.00%	11.83%	6.09%	0.81%	0.00%	1.37%	0.00%	1.90%	3.43%	2.92%	0.00%	0.00%	0.00%	0.00%	5.73%	5.20%	4.76%	2.19%	0.00%	0.00%	0.00%
Lidl, White Rock, Waddeton Close, Paignton	0.00%	7.68%	11.17%	0.00%	0.00%	0.00%	0.00%	1.39%	5.95%	16.70%	0.00%	0.00%	0.00%	0.00%	0.00%	3.11%	3.04%	0.00%	0.00%	0.00%	0.00%	9.53%	5.20%	5.58%	0.00%	0.00%	0.00%	0.00%
Other, local retail provision	0.00%	0.00%	0.34%	0.00%	0.00%	0.00%	0.00%	0.00%	2.01%	1.36%	0.00%	0.00%	0.00%	0.00%	0.00%	4.60%	19.05%	0.38%	0.00%	0.00%	0.00%	0.00%	2.42%	13.54%	0.00%	0.00%	0.00%	0.00%
OUT OF CENTRE STORES																												
Asda, Borough Close, Paignton	1.66%	3.94%	7.74%	0.78%	0.00%	0.00%	0.00%	2.16%	7.56%	7.69%	0.00%	0.00%	0.00%	0.00%	0.00%	1.49%	8.07%	0.00%	0.00%	0.00%	0.00%	0.00%	3.65%	6.21%	0.00%	0.00%	0.00%	0.00%
Iceland (Food Warehouse), Devonshire Retail Park, Paignton	1.66%	0.00%	1.65%	0.00%	1.40%	0.00%	0.00%	0.00%	3.24%	2.90%	0.00%	0.00%	0.00%	0.00%	0.00%	1.81%	0.63%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.35%	0.00%	0.00%	0.00%
Morrisons, Totnes Road, Paignton	0.00%	11.83%	23.29%	3.14%	0.00%	1.99%	0.00%	3.25%	9.98%	19.81%	2.65%	0.00%	0.00%	0.00%	0.00%	1.95%	8.34%	0.38%	0.00%	0.00%	0.00%	0.00%	3.11%	9.32%	0.00%	0.00%	0.00%	0.00%
Sainsburys Superstore, Yalberton Road, Paignton	2.54%	29.12%	14.47%	0.32%	0.00%	0.00%	0.00%	6.80%	18.12%	12.65%	0.00%	0.00%	0.00%	0.00%	1.16%	3.49%	6.04%	0.93%	0.00%	0.00%	0.00%	0.00%	0.00%	7.25%	0.00%	0.00%	0.00%	0.00%
BRIXHAM TOWN CENTRE																												
Co-op, 14-16 Fore Street, Brixham (middle of town centre)	0.00%	6.05%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	7.53%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	13.59%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	7.78%	0.00%	0.00%	0.00%	0.00%	0.00%
Co-op, 75 Fore Street, Brixham (closer to sea front)	0.00%	0.49%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.58%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.11%	0.00%	0.00%	0.00%	0.00%	0.00%
Tesco Express, Fore Street, Brixham	0.00%	2.92%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	7.09%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.23%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	7.08%	0.00%	0.00%	0.00%	0.00%	0.00%
Brixham TOWN CENTRE	0.00%	0.97%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	7.96%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	19.41%	0.40%	0.38%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
OTHER STORES IN BRIXHAM																												
	0.00%	4.91%	0.86%	0.00%	0.00%	0.00%	0.00%	0.00%	5.60%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	28.92%	1.03%	0.00%	0.00%	0.00%	0.00%	0.00%	33.90%	0.93%	0.00%	0.00%	0.00%	0.00%
STORES OUTSIDE TORBAY																												
	89.61%	2.43%	0.34%	13.16%	91.31%	96.38%	97.16%	78.39%	0.79%	3.32%	15.80%	90.97%	95.41%	94.35%	93.38%	5.29%	2.46%	5.66%	96.88%	98.26%	99.06%	82.30%	15.39%	0.00%	12.28%	90.12%	99.98%	94.40%

Notes:
Market shares taken from 2022 household survey (excluding null responses and SFT data).

TABLE 5a: CONVENIENCE GOODS TURNOVER, BY ZONE, 2022

STORE / CENTRE	FIRST CHOICE MAIN FOOD							SECOND CHOICE MAIN FOOD							FIRST CHOICE TOP-UP							SECOND CHOICE TOP-UP							TOTAL TURNOVER (£m)
	2	3	4	5	6	7	8	2	3	4	5	6	7	8	2	3	4	5	6	7	8	2	3	4	5	6	7	8	
TORQUAY TOWN CENTRE																													
Iceland, Union Square Shopping Centre, Torquay	£0.00	£0.00	£0.00	£0.53	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.74	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.66	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.20	£0.00	£0.00	£0.00	£2.14
Tesco Express, Fleet Street, Torquay Town Centre	£0.32	£0.00	£0.00	£2.69	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.51	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.77	£0.00	£0.00	£0.00	£5.47
Torquay TOWN CENTRE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.16	£0.48	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.47	£0.00	£0.00	£0.00	£1.11	
THE WILLOWS DISTRICT CENTRE																													
Marks & Spencer, The Willows, Torquay	£0.00	£0.42	£1.04	£2.23	£0.66	£0.00	£0.83	£0.00	£0.08	£1.17	£2.68	£1.48	£0.00	£0.80	£0.00	£0.15	£0.48	£0.89	£0.00	£0.00	£0.00	£0.22	£0.11	£0.00	£0.73	£0.67	£0.00	£0.28	£14.92
Sainsburys Superstore, Nicholson Road, The Willows, Torquay	£0.00	£0.00	£3.17	£20.27	£2.45	£0.27	£0.33	£0.97	£0.13	£1.41	£9.44	£0.51	£0.46	£0.00	£0.00	£0.00	£0.00	£1.31	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£1.54	£0.62	£0.00	£0.00	£42.98
The Willows Local Centre, Torquay	£0.00	£0.00	£0.20	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.27	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.54	
ST MARYCHURCH DISTRICT CENTRE																													
Co-op, Fore Street, St Marychurch, Torquay	£0.00	£0.00	£0.00	£0.68	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.54	£0.00	£0.25	£0.00	£0.00	£0.00	£0.00	£0.78	£0.00	£0.00	£0.00	£3.24	
Sainsburys Local, St Marychurch, Torquay, TQ1 4LY	£0.00	£0.00	£0.52	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.66	£0.00	£0.00	£0.00	£0.00	£0.00	£0.32	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.04	£0.00	£0.00	£0.00	£2.53	
Tesco Express, Babacombe Road, Torquay	£0.00	£0.00	£0.00	£0.68	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.43	£0.00	£0.00	£0.00	£0.00	£0.00	£2.42	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.32	£0.00	£0.00	£0.00	£3.85	
St Marychurch Local Centre, Torquay	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.34	£0.18	£0.00	£0.00	£0.00	£0.00	£0.00	£0.45	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.98	
LOCAL RETAIL PROVISION																													
	£0.32	£0.00	£0.41	£8.89	£0.00	£0.27	£0.00	£0.00	£0.00	£0.69	£3.02	£0.00	£0.00	£0.38	£0.00	£2.53	£17.25	£0.00	£0.00	£0.00	£0.00	£0.00	£0.37	£5.38	£0.00	£0.00	£0.00	£39.50	
OUT OF CENTRE STORES																													
Asda, Newton Road, Torquay	£0.77	£0.00	£1.76	£18.28	£0.00	£0.00	£0.00	£0.00	£0.19	£0.35	£6.15	£0.77	£0.18	£0.00	£0.00	£0.27	£4.15	£0.95	£0.00	£0.16	£0.00	£0.18	£0.00	£0.83	£0.00	£0.00	£0.00	£35.01	
Lidl, Newton Road, Torquay	£0.00	£0.00	£1.92	£12.40	£2.08	£0.00	£0.00	£0.71	£0.00	£0.14	£5.33	£0.00	£0.00	£0.00	£0.15	£0.42	£1.48	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.52	£0.00	£0.00	£0.14	£25.29	
PAIGNTON TOWN CENTRE																													
Co-op, Winner Street / Palace Avenue, Paignton	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.98	£0.00	£0.00	£0.00	£0.00	£0.00	£0.41	£0.00	£0.00	£0.00	£0.00	£1.53		
Iceland, Victoria Street, Paignton	£0.00	£0.12	£1.13	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£0.71	£0.00	£0.00	£0.00	£0.00	£0.00	£0.95	£0.00	£0.00	£0.00	£0.00	£0.00	£0.81	£0.00	£0.00	£0.00	£0.00	£3.79		
Lidl, Victoria Centre, Paignton	£0.81	£0.66	£3.58	£0.00	£0.00	£0.00	£0.00	£0.00	£0.25	£1.08	£0.00	£0.00	£0.00	£0.37	£0.06	£0.91	£0.00	£0.00	£0.00	£0.00	£0.00	£1.28	£0.00	£0.00	£0.00	£0.00	£8.98		
Tesco Express, Victoria Street, Paignton	£0.00	£0.12	£0.20	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.35	£0.00	£0.00	£0.00	£0.00	£0.00	£1.18	£0.00	£0.00	£0.00	£0.00	£0.00	£0.27	£0.00	£0.00	£0.00	£0.00	£2.12		
Paignton TOWN CENTRE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£0.14	£0.00	£0.00	£0.00	£0.00	£0.09	£0.57	£0.00	£0.00	£0.00	£0.00	£0.07	£0.43	£0.00	£0.00	£0.00	£0.00	£1.38		
PRESTON DISTRICT CENTRE																													
Sainsburys Local, Torquay Road, Preston, Paignton	£0.00	£1.73	£1.97	£0.00	£0.00	£0.00	£0.00	£0.00	£0.47	£0.49	£0.00	£0.00	£0.00	£0.00	£0.15	£2.36	£0.21	£0.00	£0.00	£0.00	£0.16	£0.86	£0.00	£0.00	£0.00	£0.00	£8.41		
Spar, Torquay Road, Preston, Paignton	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£0.25	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.00	£0.00	£0.41		
Tesco Express, Concord House, Paignton	£0.00	£0.00	£0.20	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.66	£0.00	£0.00	£0.00	£0.00	£0.00	£1.34	£0.00	£0.00	£0.00	£0.00	£0.07	£1.21	£0.00	£0.00	£0.00	£0.00	£3.49		
Post Office, Preston Down Road, Paignton, TQ3 1DS	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10		
LOCAL RETAIL PROVISION																													
Aldi, Brixham Road, Paignton	£0.00	£4.16	£8.25	£2.17	£0.00	£0.00	£0.00	£0.00	£1.23	£1.58	£0.29	£0.00	£0.19	£0.40	£0.36	£0.76	£0.00	£0.00	£0.00	£0.51	£0.23	£0.53	£0.34	£0.00	£0.00	£0.00	£20.99		
Lidl, White Rock, Waddeton Close, Paignton	£0.00	£1.86	£6.78	£0.00	£0.00	£0.00	£0.00	£0.29	£0.62	£4.34	£0.00	£0.00	£0.00	£0.00	£0.32	£0.79	£0.00	£0.00	£0.00	£0.85	£0.23	£0.62	£0.00	£0.00	£0.00	£0.00	£16.71		
Other, local retail provision	£0.00	£0.00	£0.20	£0.00	£0.00	£0.00	£0.00	£0.00	£0.21	£0.35	£0.00	£0.00	£0.00	£0.00	£0.48	£4.95	£0.14	£0.00	£0.00	£0.00	£0.11	£1.51	£0.00	£0.00	£0.00	£0.00	£7.95		
OUT OF CENTRE STORES																													
Asda, Borough Close, Paignton	£0.81	£0.96	£4.70	£0.65	£0.00	£0.00	£0.00	£0.45	£0.79	£2.00	£0.00	£0.00	£0.00	£0.00	£0.15	£2.10	£0.00	£0.00	£0.00	£0.00	£0.16	£0.69	£0.00	£0.00	£0.00	£0.00	£13.46		
Iceland (Food Warehouse), Devonshire Retail Park, Paignton	£0.81	£0.00	£1.00	£0.00	£1.00	£0.00	£0.00	£0.00	£0.34	£0.75	£0.00	£0.00	£0.00	£0.00	£0.19	£0.16	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.51	£0.00	£0.00	£0.00	£4.76		
Morrisons, Totnes Road, Paignton	£0.00	£2.87	£14.13	£2.62	£0.00	£0.66	£0.00	£0.68	£1.04	£5.15	£0.95	£0.00	£0.00	£0.00	£0.20	£2.17	£0.14	£0.00	£0.00	£0.00	£0.14	£1.04	£0.00	£0.00	£0.00	£0.00	£31.78		
Sainsburys Superstore, Yalberton Road, Paignton	£1.24	£7.06	£8.78	£0.27	£0.00	£0.00	£0.00	£1.42	£1.88	£3.29	£0.00	£0.00	£0.00	£0.24	£0.36	£1.57	£0.33	£0.00	£0.00	£0.00	£0.00	£0.81	£0.00	£0.00	£0.00	£0.00	£27.27		
BRIXHAM TOWN CENTRE																													
Co-op, 14-16 Fore Street, Brixham (middle of town centre)	£0.00	£1.47	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.78	£0.00	£0.00	£0.00	£0.00	£0.00	£1.41	£0.00	£0.00	£0.00	£0.00	£0.00	£0.35	£0.00	£0.00	£0.00	£0.00	£0.00	£4.01		
Co-op, 75 Fore Street, Brixham (closer to sea front)	£0.00	£0.12	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.00	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.32		
Tesco Express, Fore Street, Brixham	£0.00	£0.71	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.74	£0.00	£0.00	£0.00	£0.00	£0.00	£0.54	£0.00	£0.00	£0.00	£0.00	£0.00	£0.32	£0.00	£0.00	£0.00	£0.00	£0.00	£2.30		
Brixham TOWN CENTRE	£0.00	£0.24	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.83	£0.00	£0.00	£0.00	£0.00	£0.00	£2.02	£0.10	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.32		
OTHER STORES IN BRIXHAM																													
	£0.00	£1.19	£0.52	£0.00	£0.00	£0.00	£0.00	£0.00	£0.58	£0.00	£0.00	£0.00	£0.00	£0.00	£3.01	£0.27	£0.00	£0.00	£0.00	£0.00	£1.51	£0.10	£0.00	£0.00	£0.00	£0.00	£7.18		
STORES OUTSIDE TORBAY																													
	£43.77	£0.59	£0.20	£10.96	£65.01	£31.91	£39.58	£16.41	£0.08	£0.86	£5.64	£27.76	£13.54	£16.47	£19.55	£0.55	£0.64	£2.02	£29.56	£13.94	£17.29	£7.38	£0.69	£0.00	£1.88	£11.78	£6.08	£7.06	£391.23

Notes:
Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 5b: CONVENIENCE GOODS TURNOVER, BY ZONE, 2027

STORE / CENTRE	FIRST CHOICE MAIN FOOD							SECOND CHOICE MAIN FOOD							FIRST CHOICE TOP-UP							SECOND CHOICE TOP-UP							TOTAL TURNOVER (£m)
	2	3	4	5	6	7	8	2	3	4	5	6	7	8	2	3	4	5	6	7	8	2	3	4	5	6	7	8	
TORQUAY TOWN CENTRE																													
Iceland, Union Square Shopping Centre, Torquay	£0.00	£0.00	£0.00	£0.54	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.74	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.67	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.21	£0.00	£0.00	£0.00	£2.16
Tesco Express, Fleet Street, Torquay Town Centre	£0.32	£0.00	£0.00	£2.71	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.19	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.52	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.78	£0.00	£0.00	£0.00	£5.51
Torquay TOWN CENTRE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.16	£0.49	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.47	£0.00	£0.00	£0.00	£1.12	
THE WILLOWS DISTRICT CENTRE																													
Marks & Spencer, The Willows, Torquay	£0.00	£0.42	£1.05	£2.24	£0.68	£0.00	£0.85	£0.00	£0.08	£1.18	£2.70	£1.53	£0.00	£0.82	£0.00	£0.16	£0.48	£0.90	£0.00	£0.00	£0.00	£0.22	£0.11	£0.00	£0.73	£0.69	£0.00	£0.28	£15.11
Sainsburys Superstore, Nicholson Road, The Willows, Torquay	£0.00	£0.00	£3.20	£20.41	£2.52	£0.28	£0.33	£0.99	£0.13	£1.43	£9.50	£0.52	£0.47	£0.00	£0.00	£0.00	£0.00	£1.32	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£1.55	£0.64	£0.00	£0.00	£43.39
The Willows Local Centre, Torquay	£0.00	£0.00	£0.21	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.27	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.54	
ST MARYCHURCH DISTRICT CENTRE																													
Co-op, Fore Street, St Marychurch, Torquay	£0.00	£0.00	£0.00	£0.68	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.55	£0.00	£0.25	£0.00	£0.00	£0.00	£0.00	£0.78	£0.00	£0.00	£0.00	£3.27	
Sainsburys Local, St Marychurch, Torquay, TQ1 4LY	£0.00	£0.00	£0.52	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.66	£0.00	£0.00	£0.00	£0.00	£0.00	£0.32	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.04	£0.00	£0.00	£0.00	£2.55	
Tesco Express, Babacombe Road, Torquay	£0.00	£0.00	£0.00	£0.68	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.44	£0.00	£0.00	£0.00	£0.00	£0.00	£2.43	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.32	£0.00	£0.00	£0.00	£3.88	
St Marychurch Local Centre, Torquay	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.34	£0.19	£0.00	£0.00	£0.00	£0.00	£0.00	£0.46	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.98	
LOCAL RETAIL PROVISION																													
	£0.32	£0.00	£0.41	£8.95	£0.00	£0.28	£0.00	£0.00	£0.00	£0.70	£3.04	£0.00	£0.00	£0.39	£0.00	£2.55	£17.36	£0.00	£0.00	£0.00	£0.00	£0.00	£0.37	£5.41	£0.00	£0.00	£0.00	£39.78	
OUT OF CENTRE STORES																													
Asda, Newton Road, Torquay	£0.79	£0.00	£1.78	£18.40	£0.00	£0.00	£0.00	£0.00	£0.19	£0.36	£6.20	£0.79	£0.00	£0.19	£0.00	£0.00	£0.27	£4.18	£0.98	£0.00	£0.17	£0.00	£0.18	£0.00	£0.84	£0.00	£0.00	£0.00	£35.30
Lidl, Newton Road, Torquay	£0.00	£0.00	£1.94	£12.48	£2.14	£0.00	£0.00	£0.72	£0.00	£0.14	£5.37	£0.00	£0.00	£0.00	£0.16	£0.42	£1.49	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.53	£0.00	£0.00	£0.14	£25.52	
PAIGNTON TOWN CENTRE																													
Co-op, Winner Street / Palace Avenue, Paignton	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.99	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.42	£0.00	£0.00	£0.00	£0.00	£1.54	
Iceland, Victoria Street, Paignton	£0.00	£0.12	£1.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£0.71	£0.00	£0.00	£0.00	£0.00	£0.00	£0.95	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.81	£0.00	£0.00	£0.00	£0.00	£3.82	
Lidl, Victoria Centre, Paignton	£0.82	£0.66	£3.61	£0.00	£0.00	£0.00	£0.00	£0.00	£0.25	£1.08	£0.00	£0.00	£0.00	£0.37	£0.06	£0.92	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.29	£0.00	£0.00	£0.00	£0.00	£9.06	
Tesco Express, Victoria Street, Paignton	£0.00	£0.12	£0.21	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.36	£0.00	£0.00	£0.00	£0.00	£0.00	£1.19	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.27	£0.00	£0.00	£0.00	£0.00	£2.14	
Paignton TOWN CENTRE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£0.14	£0.00	£0.00	£0.00	£0.00	£0.09	£0.57	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£0.43	£0.00	£0.00	£0.00	£0.00	£1.39	
PRESTON DISTRICT CENTRE																													
Sainsburys Local, Torquay Road, Preston, Paignton	£0.00	£1.74	£1.99	£0.00	£0.00	£0.00	£0.00	£0.00	£0.48	£0.49	£0.00	£0.00	£0.00	£0.00	£0.16	£2.37	£0.21	£0.00	£0.00	£0.00	£0.00	£0.16	£0.86	£0.00	£0.00	£0.00	£0.00	£8.47	
Spar, Torquay Road, Preston, Paignton	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£0.25	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.00	£0.00	£0.41	
Tesco Express, Concord House, Paignton	£0.00	£0.00	£0.21	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.67	£0.00	£0.00	£0.00	£0.00	£0.00	£1.35	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£1.22	£0.00	£0.00	£0.00	£0.00	£3.52	
Post Office, Preston Down Road, Paignton, TQ3 1DS	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	
LOCAL RETAIL PROVISION																													
Aldi, Brixham Road, Paignton	£0.00	£4.18	£8.31	£2.18	£0.00	£0.00	£0.00	£0.00	£1.24	£1.60	£0.29	£0.00	£0.20	£0.00	£0.40	£0.36	£0.76	£0.00	£0.00	£0.00	£0.00	£0.52	£0.23	£0.53	£0.34	£0.00	£0.00	£0.00	£21.15
Lidl, White Rock, Waddeton Close, Paignton	£0.00	£1.87	£6.83	£0.00	£0.00	£0.00	£0.00	£0.30	£0.62	£4.38	£0.00	£0.00	£0.00	£0.00	£0.32	£0.80	£0.00	£0.00	£0.00	£0.00	£0.87	£0.23	£0.63	£0.00	£0.00	£0.00	£0.00	£16.85	
Other, local retail provision	£0.00	£0.00	£0.21	£0.00	£0.00	£0.00	£0.00	£0.00	£0.21	£0.36	£0.00	£0.00	£0.00	£0.00	£0.48	£4.99	£0.14	£0.00	£0.00	£0.00	£0.00	£0.11	£1.52	£0.00	£0.00	£0.00	£0.00	£8.01	
OUT OF CENTRE STORES																													
Asda, Borough Close, Paignton	£0.82	£0.96	£4.74	£0.66	£0.00	£0.00	£0.00	£0.46	£0.79	£2.02	£0.00	£0.00	£0.00	£0.00	£0.16	£2.11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.16	£0.70	£0.00	£0.00	£0.00	£0.00	£13.57	
Iceland (Food Warehouse), Devonshire Retail Park, Paignton	£0.82	£0.00	£1.01	£0.00	£1.02	£0.00	£0.00	£0.00	£0.34	£0.76	£0.00	£0.00	£0.00	£0.00	£0.19	£0.16	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.52	£0.00	£0.00	£0.00	£4.82	
Morrisons, Totnes Road, Paignton	£0.00	£2.89	£14.24	£2.63	£0.00	£0.68	£0.00	£0.69	£1.04	£5.19	£0.95	£0.00	£0.00	£0.00	£0.20	£2.19	£0.14	£0.00	£0.00	£0.00	£0.00	£0.14	£1.05	£0.00	£0.00	£0.00	£0.00	£32.04	
Sainsburys Superstore, Yalberton Road, Paignton	£1.26	£7.10	£8.85	£0.27	£0.00	£0.00	£0.00	£1.45	£1.89	£3.32	£0.00	£0.00	£0.00	£0.25	£0.36	£1.58	£0.33	£0.00	£0.00	£0.00	£0.00	£0.00	£0.81	£0.00	£0.00	£0.00	£0.00	£27.49	
BRIXHAM TOWN CENTRE																													
Co-op, 14-16 Fore Street, Brixham (middle of town centre)	£0.00	£1.48	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.79	£0.00	£0.00	£0.00	£0.00	£0.00	£1.42	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.35	£0.00	£0.00	£0.00	£0.00	£0.00	£4.03	
Co-op, 75 Fore Street, Brixham (closer to sea front)	£0.00	£0.12	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.32	
Tesco Express, Fore Street, Brixham	£0.00	£0.71	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.74	£0.00	£0.00	£0.00	£0.00	£0.00	£0.55	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.32	£0.00	£0.00	£0.00	£0.00	£0.00	£2.32	
Brixham TOWN CENTRE	£0.00	£0.24	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.83	£0.00	£0.00	£0.00	£0.00	£0.00	£2.03	£0.11	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.34	
OTHER STORES IN BRIXHAM																													
	£0.00	£1.20	£0.52	£0.00	£0.00	£0.00	£0.00	£0.00	£0.59	£0.00	£0.00	£0.00	£0.00	£0.00	£3.02	£0.27	£0.00	£0.00	£0.00	£0.00	£0.00	£1.52	£0.10	£0.00	£0.00	£0.00	£0.00	£7.23	
STORES OUTSIDE TORBAY																													
	£44.53	£0.59	£0.21	£11.04	£66.86	£32.81	£40.28	£16.70	£0.08	£0.87	£5.68	£28.55	£13.92	£16.76	£19.89	£0.55	£0.65	£2.03	£30.40	£14.34	£17.60	£7.51	£0.69	£0.00	£1.89	£12.12	£6.25	£7.19	£399.98

Notes:
Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 5c: CONVENIENCE GOODS TURNOVER, BY ZONE, 2032

STORE / CENTRE	FIRST CHOICE MAIN FOOD							SECOND CHOICE MAIN FOOD							FIRST CHOICE TOP-UP							SECOND CHOICE TOP-UP							TOTAL TURNOVER (£m)
	2	3	4	5	6	7	8	2	3	4	5	6	7	8	2	3	4	5	6	7	8	2	3	4	5	6	7	8	
TORQUAY TOWN CENTRE																													
Iceland, Union Square Shopping Centre, Torquay	£0.00	£0.00	£0.00	£0.55	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.76	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.69	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.21	£0.00	£0.00	£0.00	£2.21
Tesco Express, Fleet Street, Torquay Town Centre	£0.33	£0.00	£0.00	£2.78	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.19	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.56	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.80	£0.00	£0.00	£0.00	£5.65
Torquay TOWN CENTRE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.17	£0.50	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.48	£0.00	£0.00	£0.00	£1.15	
THE WILLOWS DISTRICT CENTRE																													
Marks & Spencer, The Willows, Torquay	£0.00	£0.43	£1.07	£2.30	£0.71	£0.00	£0.87	£0.00	£0.08	£1.20	£2.76	£1.59	£0.00	£0.84	£0.00	£0.16	£0.49	£0.92	£0.00	£0.00	£0.00	£0.23	£0.11	£0.00	£0.75	£0.72	£0.00	£0.29	£15.51
Sainsburys Superstore, Nicholson Road, The Willows, Torquay	£0.00	£0.00	£3.26	£20.92	£2.63	£0.29	£0.34	£1.01	£0.13	£1.45	£9.74	£0.54	£0.49	£0.00	£0.00	£0.00	£0.00	£1.35	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£1.59	£0.66	£0.00	£0.00	£44.51
The Willows Local Centre, Torquay	£0.00	£0.00	£0.21	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.28	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.55	
ST MARYCHURCH DISTRICT CENTRE																													
Co-op, Fore Street, St Marychurch, Torquay	£0.00	£0.00	£0.00	£0.70	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.59	£0.00	£0.26	£0.00	£0.00	£0.00	£0.00	£0.80	£0.00	£0.00	£0.00	£3.35	
Sainsburys Local, St Marychurch, Torquay, TQ1 4LY	£0.00	£0.00	£0.53	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.68	£0.00	£0.00	£0.00	£0.00	£0.00	£0.33	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.07	£0.00	£0.00	£0.00	£2.61	
Tesco Express, Babacombe Road, Torquay	£0.00	£0.00	£0.00	£0.70	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.45	£0.00	£0.00	£0.00	£0.00	£0.00	£2.50	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.33	£0.00	£0.00	£0.00	£3.98	
St Marychurch Local Centre, Torquay	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.35	£0.19	£0.00	£0.00	£0.00	£0.00	£0.00	£0.47	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.01	
LOCAL RETAIL PROVISION																													
	£0.33	£0.00	£0.42	£9.17	£0.00	£0.29	£0.00	£0.00	£0.00	£0.71	£3.12	£0.00	£0.00	£0.40	£0.00	£2.60	£17.80	£0.00	£0.00	£0.00	£0.00	£0.00	£0.38	£5.55	£0.00	£0.00	£0.00	£40.76	
OUT OF CENTRE STORES																													
Asda, Newton Road, Torquay	£0.81	£0.00	£1.81	£18.86	£0.00	£0.00	£0.00	£0.00	£0.20	£0.36	£6.35	£0.82	£0.19	£0.00	£0.00	£0.27	£4.28	£1.02	£0.00	£0.17	£0.00	£0.18	£0.00	£0.86	£0.00	£0.00	£0.00	£36.20	
Lidl, Newton Road, Torquay	£0.00	£0.00	£1.98	£12.79	£2.22	£0.00	£0.00	£0.74	£0.00	£0.14	£5.50	£0.00	£0.00	£0.00	£0.16	£0.43	£1.52	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.54	£0.00	£0.00	£0.15	£26.18	
PAIGNTON TOWN CENTRE																													
Co-op, Winner Street / Palace Avenue, Paignton	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£1.01	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.43	£0.00	£0.00	£0.00	£0.00	£1.57	
Iceland, Victoria Street, Paignton	£0.00	£0.12	£1.16	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£0.73	£0.00	£0.00	£0.00	£0.00	£0.00	£0.97	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.83	£0.00	£0.00	£0.00	£0.00	£3.89	
Lidl, Victoria Centre, Paignton	£0.84	£0.67	£3.68	£0.00	£0.00	£0.00	£0.00	£0.00	£0.25	£1.11	£0.00	£0.00	£0.00	£0.38	£0.06	£0.94	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.32	£0.00	£0.00	£0.00	£0.00	£9.24	
Tesco Express, Victoria Street, Paignton	£0.00	£0.12	£0.21	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.36	£0.00	£0.00	£0.00	£0.00	£0.00	£1.21	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.27	£0.00	£0.00	£0.00	£0.00	£2.18	
Paignton TOWN CENTRE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£0.14	£0.00	£0.00	£0.00	£0.00	£0.10	£0.59	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£0.44	£0.00	£0.00	£0.00	£0.00	£1.42	
PRESTON DISTRICT CENTRE																													
Sainsburys Local, Torquay Road, Preston, Paignton	£0.00	£1.76	£2.03	£0.00	£0.00	£0.00	£0.00	£0.00	£0.48	£0.50	£0.00	£0.00	£0.00	£0.00	£0.16	£2.42	£0.22	£0.00	£0.00	£0.00	£0.00	£0.17	£0.88	£0.00	£0.00	£0.00	£0.00	£8.62	
Spar, Torquay Road, Preston, Paignton	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£0.25	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.42	
Tesco Express, Concord House, Paignton	£0.00	£0.00	£0.21	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.68	£0.00	£0.00	£0.00	£0.00	£0.00	£1.38	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£1.25	£0.00	£0.00	£0.00	£0.00	£3.58	
Post Office, Preston Down Road, Paignton, TQ3 1DS	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	
LOCAL RETAIL PROVISION																													
Aldi, Brixham Road, Paignton	£0.00	£4.24	£8.47	£2.24	£0.00	£0.00	£0.00	£0.00	£1.25	£1.63	£0.30	£0.00	£0.21	£0.00	£0.41	£0.36	£0.78	£0.00	£0.00	£0.00	£0.00	£0.54	£0.24	£0.54	£0.35	£0.00	£0.00	£0.00	£21.55
Lidl, White Rock, Waddeton Close, Paignton	£0.00	£1.90	£6.96	£0.00	£0.00	£0.00	£0.00	£0.30	£0.63	£4.46	£0.00	£0.00	£0.00	£0.00	£0.33	£0.81	£0.00	£0.00	£0.00	£0.00	£0.89	£0.24	£0.64	£0.00	£0.00	£0.00	£0.00	£17.16	
Other, local retail provision	£0.00	£0.00	£0.21	£0.00	£0.00	£0.00	£0.00	£0.00	£0.21	£0.36	£0.00	£0.00	£0.00	£0.00	£0.49	£5.09	£0.14	£0.00	£0.00	£0.00	£0.00	£0.11	£1.55	£0.00	£0.00	£0.00	£0.00	£8.16	
OUT OF CENTRE STORES																													
Asda, Borough Close, Paignton	£0.84	£0.97	£4.83	£0.67	£0.00	£0.00	£0.00	£0.47	£0.80	£2.05	£0.00	£0.00	£0.00	£0.00	£0.16	£2.15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.17	£0.71	£0.00	£0.00	£0.00	£0.00	£13.83	
Iceland (Food Warehouse), Devonshire Retail Park, Paignton	£0.84	£0.00	£1.03	£0.00	£1.06	£0.00	£0.00	£0.00	£0.34	£0.78	£0.00	£0.00	£0.00	£0.00	£0.19	£0.17	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.53	£0.00	£0.00	£0.00	£4.94	
Morrisons, Totnes Road, Paignton	£0.00	£2.93	£14.52	£2.70	£0.00	£0.70	£0.00	£0.71	£1.06	£5.29	£0.98	£0.00	£0.00	£0.00	£0.21	£2.23	£0.14	£0.00	£0.00	£0.00	£0.00	£0.14	£1.07	£0.00	£0.00	£0.00	£0.00	£32.66	
Sainsburys Superstore, Yalberton Road, Paignton	£1.29	£7.20	£9.02	£0.28	£0.00	£0.00	£0.00	£1.48	£1.92	£3.38	£0.00	£0.00	£0.00	£0.25	£0.37	£1.61	£0.34	£0.00	£0.00	£0.00	£0.00	£0.00	£0.83	£0.00	£0.00	£0.00	£0.00	£27.98	
BRIXHAM TOWN CENTRE																													
Co-op, 14-16 Fore Street, Brixham (middle of town centre)	£0.00	£1.50	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.80	£0.00	£0.00	£0.00	£0.00	£0.00	£1.44	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.35	£0.00	£0.00	£0.00	£0.00	£0.00	£4.09	
Co-op, 75 Fore Street, Brixham (closer to sea front)	£0.00	£0.12	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.32	
Tesco Express, Fore Street, Brixham	£0.00	£0.72	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.75	£0.00	£0.00	£0.00	£0.00	£0.00	£0.55	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.32	£0.00	£0.00	£0.00	£0.00	£0.00	£2.35	
Brixham TOWN CENTRE	£0.00	£0.24	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.84	£0.00	£0.00	£0.00	£0.00	£0.00	£2.06	£0.11	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.39	
OTHER STORES IN BRIXHAM																													
	£0.00	£1.21	£0.53	£0.00	£0.00	£0.00	£0.00	£0.00	£0.59	£0.00	£0.00	£0.00	£0.00	£0.00	£3.06	£0.28	£0.00	£0.00	£0.00	£0.00	£0.00	£1.54	£0.11	£0.00	£0.00	£0.00	£0.00	£7.33	
STORES OUTSIDE TORBAY																													
	£45.69	£0.60	£0.21	£11.31	£69.56	£33.96	£41.38	£17.13	£0.08	£0.89	£5.82	£29.70	£14.41	£17.22	£20.40	£0.56	£0.66	£2.09	£31.63	£14.84	£18.08	£7.71	£0.70	£0.00	£1.94	£12.61	£6.47	£7.38	£413.02

Notes:
Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 5d: CONVENIENCE GOODS TURNOVER, BY ZONE, 2040

STORE / CENTRE	FIRST CHOICE MAIN FOOD							SECOND CHOICE MAIN FOOD							FIRST CHOICE TOP-UP							SECOND CHOICE TOP-UP							TOTAL TURNOVER (£m)
	2	3	4	5	6	7	8	2	3	4	5	6	7	8	2	3	4	5	6	7	8	2	3	4	5	6	7	8	
TORQUAY TOWN CENTRE																													
Iceland, Union Square Shopping Centre, Torquay	£0.00	£0.00	£0.00	£0.57	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.79	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.71	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.22	£0.00	£0.00	£0.00	£2.30
Tesco Express, Fleet Street, Torquay Town Centre	£0.34	£0.00	£0.00	£2.89	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.20	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.62	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.83	£0.00	£0.00	£0.00	£5.87
Torquay TOWN CENTRE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.17	£0.52	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.50	£0.00	£0.00	£0.00	£1.19	
THE WILLOWS DISTRICT CENTRE																													
Marks & Spencer, The Willows, Torquay	£0.00	£0.44	£1.10	£2.39	£0.75	£0.00	£0.90	£0.00	£0.09	£1.23	£2.87	£1.68	£0.00	£0.86	£0.00	£0.16	£0.50	£0.95	£0.00	£0.00	£0.00	£0.24	£0.11	£0.00	£0.78	£0.76	£0.00	£0.30	£16.11
Sainsburys Superstore, Nicholson Road, The Willows, Torquay	£0.00	£0.00	£3.35	£21.74	£2.78	£0.30	£0.35	£1.05	£0.13	£1.49	£10.12	£0.57	£0.51	£0.00	£0.00	£0.00	£0.00	£1.41	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£1.65	£0.70	£0.00	£0.00	£46.26
The Willows Local Centre, Torquay	£0.00	£0.00	£0.22	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.29	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.57	
ST MARYCHURCH DISTRICT CENTRE																													
Co-op, Fore Street, St Marychurch, Torquay	£0.00	£0.00	£0.00	£0.73	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.65	£0.00	£0.28	£0.00	£0.00	£0.00	£0.00	£0.83	£0.00	£0.00	£0.00	£3.49	
Sainsburys Local, St Marychurch, Torquay, TQ1 4LY	£0.00	£0.00	£0.55	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.70	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.34	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.11	£0.00	£0.00	£0.00	£2.71
Tesco Express, Babacombe Road, Torquay	£0.00	£0.00	£0.00	£0.73	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.47	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.59	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.34	£0.00	£0.00	£0.00	£4.13
St Marychurch Local Centre, Torquay	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.36	£0.20	£0.00	£0.00	£0.00	£0.00	£0.00	£0.49	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.04	
LOCAL RETAIL PROVISION																													
	£0.34	£0.00	£0.43	£9.53	£0.00	£0.30	£0.00	£0.00	£0.00	£0.73	£3.24	£0.00	£0.00	£0.41	£0.00	£2.67	£18.49	£0.00	£0.00	£0.00	£0.00	£0.00	£0.39	£5.76	£0.00	£0.00	£0.00	£42.30	
OUT OF CENTRE STORES																													
Asda, Newton Road, Torquay	£0.83	£0.00	£1.86	£19.60	£0.00	£0.00	£0.00	£0.00	£0.20	£0.37	£6.60	£0.87	£0.00	£0.20	£0.00	£0.00	£0.28	£4.45	£1.08	£0.00	£0.18	£0.00	£0.18	£0.00	£0.89	£0.00	£0.00	£0.00	£37.60
Lidl, Newton Road, Torquay	£0.00	£0.00	£2.03	£13.29	£2.35	£0.00	£0.00	£0.76	£0.00	£0.15	£5.72	£0.00	£0.00	£0.00	£0.16	£0.44	£1.58	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.56	£0.00	£0.00	£0.15	£27.20	
PAIGNTON TOWN CENTRE																													
Co-op, Winner Street / Palace Avenue, Paignton	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.15	£0.00	£0.00	£0.00	£0.00	£0.00	£1.03	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.44	£0.00	£0.00	£0.00	£0.00	£1.62	
Iceland, Victoria Street, Paignton	£0.00	£0.12	£1.20	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09	£0.75	£0.00	£0.00	£0.00	£0.00	£0.00	£1.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.85	£0.00	£0.00	£0.00	£0.00	£4.00	
Lidl, Victoria Centre, Paignton	£0.87	£0.68	£3.78	£0.00	£0.00	£0.00	£0.00	£0.00	£0.26	£1.14	£0.00	£0.00	£0.00	£0.39	£0.06	£0.96	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.35	£0.00	£0.00	£0.00	£0.00	£9.50	
Tesco Express, Victoria Street, Paignton	£0.00	£0.12	£0.22	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.37	£0.00	£0.00	£0.00	£0.00	£0.00	£1.25	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.28	£0.00	£0.00	£0.00	£0.00	£2.24	
Paignton TOWN CENTRE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09	£0.15	£0.00	£0.00	£0.00	£0.00	£0.10	£0.60	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£0.45	£0.00	£0.00	£0.00	£0.00	£1.45	
PRESTON DISTRICT CENTRE																													
Sainsburys Local, Torquay Road, Preston, Paignton	£0.00	£1.80	£2.08	£0.00	£0.00	£0.00	£0.00	£0.00	£0.49	£0.52	£0.00	£0.00	£0.00	£0.00	£0.16	£2.49	£0.23	£0.00	£0.00	£0.00	£0.00	£0.17	£0.90	£0.00	£0.00	£0.00	£0.00	£8.84	
Spar, Torquay Road, Preston, Paignton	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£0.26	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.43	
Tesco Express, Concord House, Paignton	£0.00	£0.00	£0.22	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.70	£0.00	£0.00	£0.00	£0.00	£0.00	£1.42	£0.00	£0.00	£0.00	£0.00	£0.00	£0.07	£1.28	£0.00	£0.00	£0.00	£0.00	£3.68	
Post Office, Preston Down Road, Paignton, TQ3 1DS	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.11	
LOCAL RETAIL PROVISION																													
Aldi, Brixham Road, Paignton	£0.00	£4.33	£8.71	£2.33	£0.00	£0.00	£0.00	£0.00	£1.28	£1.67	£0.31	£0.00	£0.22	£0.00	£0.43	£0.37	£0.80	£0.00	£0.00	£0.00	£0.00	£0.55	£0.24	£0.56	£0.36	£0.00	£0.00	£0.00	£22.15
Lidl, White Rock, Waddeton Close, Paignton	£0.00	£1.94	£7.16	£0.00	£0.00	£0.00	£0.00	£0.31	£0.64	£4.59	£0.00	£0.00	£0.00	£0.00	£0.34	£0.84	£0.00	£0.00	£0.00	£0.00	£0.92	£0.24	£0.66	£0.00	£0.00	£0.00	£0.00	£17.63	
Other, local retail provision	£0.00	£0.00	£0.22	£0.00	£0.00	£0.00	£0.00	£0.00	£0.22	£0.37	£0.00	£0.00	£0.00	£0.00	£0.50	£5.23	£0.15	£0.00	£0.00	£0.00	£0.00	£0.11	£1.59	£0.00	£0.00	£0.00	£0.00	£8.39	
OUT OF CENTRE STORES																													
Asda, Borough Close, Paignton	£0.87	£1.00	£4.96	£0.70	£0.00	£0.00	£0.00	£0.49	£0.82	£2.11	£0.00	£0.00	£0.00	£0.00	£0.16	£2.22	£0.00	£0.00	£0.00	£0.00	£0.00	£0.17	£0.73	£0.00	£0.00	£0.00	£0.00	£14.22	
Iceland (Food Warehouse), Devonshire Retail Park, Paignton	£0.87	£0.00	£1.05	£0.00	£1.13	£0.00	£0.00	£0.00	£0.35	£0.80	£0.00	£0.00	£0.00	£0.00	£0.20	£0.17	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.55	£0.00	£0.00	£0.00	£5.12	
Morrisons, Totnes Road, Paignton	£0.00	£2.99	£14.92	£2.80	£0.00	£0.74	£0.00	£0.73	£1.08	£5.44	£1.02	£0.00	£0.00	£0.00	£0.21	£2.29	£0.15	£0.00	£0.00	£0.00	£0.00	£0.14	£1.10	£0.00	£0.00	£0.00	£0.00	£33.61	
Sainsburys Superstore, Yalberton Road, Paignton	£1.34	£7.35	£9.28	£0.29	£0.00	£0.00	£0.00	£1.53	£1.96	£3.47	£0.00	£0.00	£0.00	£0.26	£0.38	£1.66	£0.36	£0.00	£0.00	£0.00	£0.00	£0.00	£0.85	£0.00	£0.00	£0.00	£0.00	£28.72	
BRIXHAM TOWN CENTRE																													
Co-op, 14-16 Fore Street, Brixham (middle of town centre)	£0.00	£1.53	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.81	£0.00	£0.00	£0.00	£0.00	£0.00	£1.47	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.36	£0.00	£0.00	£0.00	£0.00	£0.00	£4.17	
Co-op, 75 Fore Street, Brixham (closer to sea front)	£0.00	£0.12	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.33	
Tesco Express, Fore Street, Brixham	£0.00	£0.74	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.77	£0.00	£0.00	£0.00	£0.00	£0.00	£0.57	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.33	£0.00	£0.00	£0.00	£0.00	£0.00	£2.40	
Brixham TOWN CENTRE	£0.00	£0.25	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.86	£0.00	£0.00	£0.00	£0.00	£0.00	£2.10	£0.11	£0.15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.46	
OTHER STORES IN BRIXHAM																													
	£0.00	£1.24	£0.55	£0.00	£0.00	£0.00	£0.00	£0.00	£0.61	£0.00	£0.00	£0.00	£0.00	£0.00	£3.13	£0.28	£0.00	£0.00	£0.00	£0.00	£0.00	£1.57	£0.11	£0.00	£0.00	£0.00	£0.00	£7.49	
STORES OUTSIDE TORBAY																													
	£47.16	£0.61	£0.22	£11.75	£73.57	£35.66	£42.66	£17.68	£0.09	£0.91	£6.05	£31.41	£15.13	£17.75	£21.06	£0.57	£0.68	£2.17	£33.45	£15.58	£18.64	£7.96	£0.71	£0.00	£2.01	£13.34	£6.79	£7.61	£431.22

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 6: MARKET SHARE OF COMPARISON GOODS DESTINATIONS, BY ZONE

STORE / CENTRE	FIRST CHOICE COTHES AND FOOTWEAR							SECOND CHOICE CLOTHES AND FOOTWEAR						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
TORQUAY TOWN CENTRE	19.3%	9.8%	16.6%	34.7%	15.0%	3.0%	7.1%	10.2%	16.7%	16.7%	29.7%	6.4%	0.0%	6.1%
THE WILLOWS DISTRICT CENTRE	13.8%	35.2%	28.6%	32.8%	4.0%	15.6%	9.5%	6.4%	29.8%	27.7%	26.4%	15.6%	17.2%	18.0%
ST MARYCHURCH DISTRICT 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%
OUT OF CENTRE RETAIL WAREHOUSES	0.0%	0.9%	3.2%	5.6%	0.0%	0.0%	0.0%	2.6%	0.0%	1.7%	3.1%	0.0%	0.0%	0.0%
OTHER PROVISION, TORQUAY	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%
PAIGNTON TOWN CENTRE	0.0%	15.0%	14.9%	0.8%	0.0%	0.0%	0.0%	3.8%	9.7%	14.0%	1.4%	0.0%	0.0%	0.0%
PRESTON DISTRICT CENTRE	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE RETAIL WAREHOUSES	2.5%	10.5%	5.0%	1.8%	0.0%	1.2%	0.0%	0.0%	4.9%	9.5%	0.0%	0.0%	0.0%	0.0%
OTHER PROVISION, PAIGNTON	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
BRIXHAM TOWN CENTRE	0.0%	9.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.6%	1.4%	0.0%	0.0%	0.0%	0.0%
OTHER PROVISION, BRIXHAM	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%
STORES OUTSIDE TORBAY	64.4%	19.0%	29.8%	24.4%	81.0%	80.3%	83.4%	77.0%	30.4%	29.0%	38.8%	78.0%	82.7%	75.9%

Notes:
Market shares taken from 2022 household survey (excluding null responses and SFT data).

TABLE 6: MARKET SHARE OF COMPARISON GOODS DESTINATIONS, BY ZONE

STORE / CENTRE	FIRST CHOICE FURNITURE AND TEXTILES							SECOND CHOICE FURNITURE AND TEXTILES						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
TORQUAY TOWN CENTRE	1.3%	5.5%	3.7%	12.3%	7.2%	0.0%	0.0%	6.4%	10.9%	6.0%	6.8%	4.3%	0.0%	22.1%
THE WILLOWS DISTRICT CENTRE	2.6%	8.4%	19.9%	16.5%	13.9%	6.0%	1.4%	12.3%	6.6%	11.7%	20.7%	11.1%	2.8%	7.1%
ST MARYCHURCH DISTRICT 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%
OUT OF CENTRE RETAIL WAREHOUSES	1.3%	15.9%	16.2%	23.0%	15.0%	6.6%	3.5%	16.0%	16.3%	25.3%	22.8%	13.7%	0.0%	0.0%
OTHER PROVISION, TORQUAY	0.0%	2.7%	0.0%	2.5%	2.4%	0.0%	0.0%	6.6%	2.2%	3.8%	5.7%	0.0%	0.0%	0.0%
PAIGNTON TOWN CENTRE	1.3%	9.3%	16.6%	0.7%	0.0%	0.0%	0.0%	4.2%	8.9%	4.7%	1.5%	0.0%	0.0%	0.0%
PRESTON DISTRICT CENTRE	0.0%	0.0%	4.6%	1.1%	0.0%	0.0%	0.0%	0.0%	5.2%	2.6%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE RETAIL WAREHOUSES	3.1%	1.5%	17.0%	0.7%	0.0%	0.0%	0.0%	0.0%	2.2%	4.4%	3.8%	0.0%	0.0%	0.0%
OTHER PROVISION, PAIGNTON	0.0%	0.8%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%
BRIXHAM TOWN CENTRE	0.0%	28.9%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	15.8%	0.0%	0.0%	0.0%	0.0%	0.0%
OTHER PROVISION, BRIXHAM	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 TORBAY	90.4%	27.0%	18.1%	43.2%	61.6%	87.4%	95.1%	54.5%	32.0%	40.5%	38.6%	70.8%	97.2%	70.8%

Notes:
Market shares taken from 2022 household survey (excluding null responses and SFT data)

TABLE 6: MARKET SHARE OF COMPARISON GOODS DESTINATIONS, BY ZONE

STORE / CENTRE	FIRST CHOICE DIY							SECOND CHOICE DIY						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
TORQUAY TOWN CENTRE	6.3%	0.9%	0.7%	2.2%	0.0%	0.0%	0.0%	4.2%	3.3%	2.2%	9.2%	1.2%	0.0%	0.0%
THE WILLOWS DISTRICT CENTRE	0.9%	1.4%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	3.1%	0.0%
ST MARYCHURCH DISTRICT 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%
OUT OF CENTRE RETAIL WAREHOUSES	11.9%	45.6%	80.3%	84.7%	8.1%	0.0%	2.1%	8.9%	25.6%	44.8%	52.6%	10.7%	0.0%	5.6%
OTHER PROVISION, TORQUAY	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	4.0%	0.0%	0.0%	0.0%
PAIGNTON TOWN CENTRE	0.0%	2.8%	3.2%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%	0.0%	0.0%	0.0%	0.0%
PRESTON DISTRICT CENTRE	0.0%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE RETAIL WAREHOUSES	0.0%	3.9%	5.6%	0.0%	0.0%	0.0%	0.0%	0.0%	17.7%	21.3%	7.9%	0.0%	0.0%	0.0%
OTHER PROVISION, PAIGNTON	0.0%	3.4%	1.6%	1.1%	0.0%	0.8%	0.0%	0.0%	5.1%	6.0%	3.2%	0.0%	0.0%	0.0%
BRIXHAM TOWN CENTRE	0.9%	29.7%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	25.9%	0.0%	0.0%	0.0%	0.0%	0.0%
OTHER PROVISION, BRIXHAM	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%
STORES OUTSIDE TORBAY	80.1%	9.8%	7.2%	9.2%	88.5%	99.2%	97.9%	86.9%	21.2%	18.7%	22.4%	88.1%	96.9%	94.4%

Notes:
Market shares taken from 2022 household survey (excluding null responses and SFT data)

TABLE 6: MARKET SHARE OF COMPARISON GOODS DESTINATIONS, BY ZONE

STORE / CENTRE	FIRST CHOICE DOMESTIC APPLIANCES							SECOND CHOICE DOMESTIC APPLIANCES						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
TORQUAY TOWN CENTRE	2.3%	6.2%	0.9%	4.0%	0.0%	0.0%	0.0%	10.1%	9.1%	2.1%	4.1%	8.9%	0.0%	0.0%
THE WILLOWS DISTRICT CENTRE	5.9%	1.7%	4.2%	14.0%	3.6%	0.0%	3.4%	0.0%	0.0%	5.2%	30.5%	4.5%	0.0%	0.0%
ST MARYCHURCH DISTRICT 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%
OUT OF CENTRE RETAIL WAREHOUSES	6.1%	65.7%	64.0%	71.9%	50.4%	8.4%	31.0%	36.1%	44.7%	47.6%	61.5%	13.9%	7.4%	35.3%
OTHER PROVISION, TORQUAY	0.0%	2.9%	0.0%	1.7%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%
PAIGNTON TOWN CENTRE	2.3%	10.0%	11.9%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	11.4%	0.0%	0.0%	0.0%	0.0%
PRESTON DISTRICT CENTRE	0.0%	0.0%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE RETAIL WAREHOUSES	0.0%	3.4%	5.1%	0.6%	0.0%	0.0%	0.0%	6.6%	12.6%	5.9%	0.0%	0.0%	0.0%	0.0%
OTHER PROVISION, PAIGNTON	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.4%	0.0%	0.0%	0.0%	0.0%
BRIXHAM TOWN CENTRE	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.8%	0.0%	0.0%	0.0%	0.0%	0.0%
OTHER PROVISION, BRIXHAM	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 TORBAY	83.3%	9.0%	11.9%	6.9%	42.5%	91.6%	65.6%	47.2%	27.8%	17.0%	3.8%	72.8%	89.7%	64.7%

Notes:
Market shares taken from 2022 household survey (excluding null responses and SFT data)

TABLE 6: MARKET SHARE OF COMPARISON GOODS DESTINATIONS, BY ZONE

STORE / CENTRE	FIRST CHOICE SMALLER ELECTRICAL GOODS							SECOND CHOICE SMALLER ELECTRICAL GOODS						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
TORQUAY TOWN CENTRE	5.7%	2.6%	2.0%	8.6%	6.9%	0.0%	0.0%	0.0%	10.3%	0.0%	11.6%	0.0%	0.0%	0.0%
THE WILLOWS DISTRICT CENTRE	0.0%	0.0%	5.7%	14.0%	8.5%	0.0%	3.7%	0.0%	0.0%	25.5%	11.9%	16.3%	0.0%	5.3%
ST MARYCHURCH DISTRICT 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%
OUT OF CENTRE RETAIL WAREHOUSES	32.1%	64.7%	74.9%	70.8%	54.2%	27.1%	46.4%	13.3%	28.7%	45.8%	59.6%	22.2%	26.7%	31.9%
OTHER PROVISION, TORQUAY	0.0%	3.6%	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.1%	0.0%	0.0%
PAIGNTON TOWN CENTRE	0.0%	6.0%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%	6.6%	2.3%	2.5%	0.0%	0.0%	0.0%
PRESTON DISTRICT CENTRE	0.0%	2.0%	3.1%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE RETAIL WAREHOUSES	0.0%	2.0%	2.7%	0.0%	0.0%	0.0%	0.0%	6.4%	15.5%	2.3%	0.0%	0.0%	0.0%	0.0%
OTHER PROVISION, PAIGNTON	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.5%	0.0%	0.0%	0.0%	0.0%
BRIXHAM TOWN CENTRE	0.0%	7.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OTHER PROVISION, BRIXHAM	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 TORBAY	62.2%	11.6%	8.4%	4.2%	30.4%	72.9%	50.0%	80.4%	39.0%	18.5%	14.3%	54.4%	73.3%	62.8%

Notes:
Market shares taken from 2022 household survey (excluding null responses and SFT data)

TABLE 6: MARKET SHARE OF COMPARISON GOODS DESTINATIONS, BY ZONE

STORE / CENTRE	FIRST CHOICE HEALTH AND BEAUTY							SECOND CHOICE HEALTH AND BEAUTY						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
TORQUAY TOWN CENTRE	4.5%	10.4%	4.3%	34.7%	2.0%	0.0%	1.0%	5.3%	24.8%	19.9%	30.9%	6.8%	0.0%	6.5%
THE WILLOWS DISTRICT CENTRE	6.3%	5.5%	27.4%	43.1%	3.2%	2.7%	6.0%	2.1%	12.4%	26.1%	28.8%	2.7%	14.5%	1.9%
ST MARYCHURCH DISTRICT CENTRE	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE RETAIL WAREHOUSES	0.0%	0.8%	1.1%	1.3%	0.0%	0.0%	0.0%	0.0%	2.1%	4.7%	1.7%	4.1%	0.0%	1.9%
OTHER PROVISION, TORQUAY	0.0%	0.8%	1.4%	3.6%	5.9%	0.0%	0.0%	5.3%	0.0%	0.0%	8.2%	0.0%	0.0%	0.0%
PAIGNTON TOWN CENTRE	2.8%	7.6%	35.2%	1.8%	0.0%	0.0%	0.0%	3.2%	15.2%	21.3%	0.0%	0.0%	0.0%	0.0%
PRESTON DISTRICT CENTRE	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%	1.1%	0.0%	0.0%	0.0%
OUT OF CENTRE RETAIL WAREHOUSES	0.0%	7.5%	11.3%	0.0%	0.0%	0.0%	0.0%	0.0%	15.2%	8.2%	2.6%	0.0%	0.0%	0.0%
OTHER PROVISION, PAIGNTON	0.0%	1.6%	6.7%	1.7%	0.0%	0.0%	0.0%	0.0%	4.1%	1.0%	0.0%	0.0%	0.0%	0.0%
BRIXHAM TOWN CENTRE	0.0%	48.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.3%	0.0%	0.0%	0.0%	0.0%	0.0%
OTHER PROVISION, BRIXHAM	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.2%	0.0%	0.0%	0.0%	0.0%	0.0%
STORES OUTSIDE TORBAY	86.4%	14.7%	12.1%	13.1%	88.9%	97.3%	93.0%	84.1%	12.6%	15.8%	26.7%	86.5%	85.5%	89.8%

Notes:
Market shares taken from 2022 household survey (excluding null responses and SFT data)

TABLE 6: MARKET SHARE OF COMPARISON GOODS DESTINATIONS, BY ZONE

STORE / CENTRE	FIRST CHOICE RECREATIONAL GOODS							SECOND CHOICE RECREATIONAL GOODS						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
TORQUAY TOWN CENTRE	1.8%	7.7%	9.5%	31.0%	1.9%	7.7%	3.9%	13.8%	13.5%	11.6%	44.5%	3.0%	0.0%	0.0%
THE WILLOWS DISTRICT CENTRE	0.0%	3.2%	2.0%	15.7%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	5.3%	0.0%	0.0%	2.7%
ST MARYCHURCH DISTRICT CENTRE	0.0%	0.0%	0.0%	5.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.7%	0.0%	0.0%	0.0%
OUT OF CENTRE RETAIL WAREHOUSES	4.3%	4.2%	18.9%	17.6%	2.8%	0.0%	0.0%	9.9%	0.0%	10.4%	21.4%	0.0%	0.0%	0.0%
OTHER PROVISION, TORQUAY	4.3%	0.0%	2.8%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
PAIGNTON TOWN CENTRE	9.0%	5.1%	39.3%	0.8%	0.0%	0.0%	0.0%	0.0%	13.7%	31.6%	0.0%	0.0%	0.0%	0.0%
PRESTON DISTRICT CENTRE	0.0%	2.0%	0.8%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE RETAIL WAREHOUSES	0.0%	27.2%	14.6%	2.0%	0.0%	0.0%	0.0%	0.0%	19.6%	15.9%	2.5%	0.0%	0.0%	0.0%
OTHER PROVISION, PAIGNTON	0.0%	5.2%	2.6%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.5%	1.6%	0.0%	0.0%	0.0%
BRIXHAM TOWN CENTRE	0.0%	31.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	27.2%	0.0%	0.0%	0.0%	0.0%	0.0%
OTHER PROVISION, BRIXHAM	0.0%	2.5%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	6.4%	0.0%	0.0%	0.0%	0.0%	0.0%
STORES OUTSIDE TORBAY	80.6%	11.5%	8.8%	21.7%	95.3%	92.3%	96.1%	76.3%	19.6%	22.2%	19.0%	97.0%	100.0%	97.3%

Notes:
Market shares taken from 2022 household survey (excluding null responses and SFT data)

TABLE 7a: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2022

STORE / CENTRE	FIRST CHOICE COTHES AND FOOTWEAR							SECOND CHOICE CLOTHES AND FOOTWEAR						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£3.6	£0.9	£3.9	£10.8	£4.3	£0.4	£1.1	£0.8	£0.7	£1.7	£4.0	£0.8	£0.0	£0.4
<i>THE WILLOWS DISTRICT CENTRE</i>	£2.5	£3.2	£6.7	£10.2	£1.1	£1.9	£1.5	£0.5	£1.2	£2.8	£3.5	£1.9	£0.9	£1.2
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.1	£0.7	£1.7	£0.0	£0.0	£0.0	£0.2	£0.0	£0.2	£0.4	£0.0	£0.0	£0.0
<i>OTHER PROVISION, TORQUAY</i>	£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
<i>PAIGNTON TOWN CENTRE</i>	£0.0	£1.4	£3.5	£0.3	£0.0	£0.0	£0.0	£0.3	£0.4	£1.4	£0.2	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.5	£1.0	£1.2	£0.6	£0.0	£0.1	£0.0	£0.0	£0.2	£1.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0
<i>STORES OUTSIDE TORBAY</i>	£11.9	£1.7	£7.0	£7.6	£23.3	£9.9	£13.3	£6.1	£1.2	£2.9	£5.2	£9.6	£4.4	£5.2

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7a: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2022

STORE / CENTRE	FIRST CHOICE FURNITURE AND TEXTILES							SECOND CHOICE FURNITURE AND TEXTILES						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£0.2	£0.4	£0.6	£2.9	£1.6	£0.0	£0.0	£0.4	£0.3	£0.5	£0.7	£0.4	£0.0	£1.2
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.4	£0.6	£3.5	£3.9	£3.0	£0.6	£0.2	£0.7	£0.2	£0.9	£2.1	£1.0	£0.1	£0.4
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.2	£1.1	£2.8	£5.4	£3.3	£0.6	£0.4	£1.0	£0.5	£1.9	£2.3	£1.3	£0.0	£0.0
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.2	£0.0	£0.6	£0.5	£0.0	£0.0	£0.4	£0.1	£0.3	£0.6	£0.0	£0.0	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.2	£0.7	£2.9	£0.2	£0.0	£0.0	£0.0	£0.3	£0.3	£0.4	£0.2	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.8	£0.3	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.4	£0.1	£3.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£0.4	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.1	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£2.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£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
<i>STORES OUTSIDE TORBAY</i>	£12.7	£1.9	£3.2	£10.2	£13.4	£8.2	£11.6	£3.3	£1.0	£3.0	£3.9	£6.6	£3.9	£3.7

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7a: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2022

STORE / CENTRE	FIRST CHOICE DIY							SECOND CHOICE DIY						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£0.6	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0	£0.2	£0.1	£0.1	£0.5	£0.1	£0.0	£0.0
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.1	£0.1	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£1.2	£2.0	£8.2	£11.3	£1.0	£0.0	£0.1	£0.4	£0.5	£2.0	£3.0	£0.6	£0.0	£0.2
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.2	£0.0	£0.0	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.0	£0.1	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.2	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.9	£0.5	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.2	£0.2	£0.1	£0.0	£0.1	£0.0	£0.0	£0.1	£0.3	£0.2	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.1	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>STORES OUTSIDE TORBAY</i>	£8.1	£0.4	£0.7	£1.2	£11.4	£6.9	£7.1	£3.8	£0.4	£0.8	£1.3	£4.9	£2.9	£2.9

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7a: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2022

STORE / CENTRE	FIRST CHOICE DOMESTIC APPLIANCES							SECOND CHOICE DOMESTIC APPLIANCES						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£0.1	£0.1	£0.0	£0.2	£0.0	£0.0	£0.0	£0.2	£0.1	£0.0	£0.1	£0.3	£0.0	£0.0
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.3	£0.0	£0.2	£0.8	£0.2	£0.0	£0.1	£0.0	£0.0	£0.1	£0.8	£0.1	£0.0	£0.0
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.3	£1.2	£2.9	£4.2	£3.3	£0.4	£1.0	£0.8	£0.3	£0.9	£1.6	£0.4	£0.1	£0.5
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.1	£0.0	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.1	£0.2	£0.5	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£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
<i>OTHER PROVISION, BRIXHAM</i>	£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
<i>STORES OUTSIDE TORBAY</i>	£4.5	£0.2	£0.5	£0.4	£2.8	£3.9	£2.1	£1.1	£0.2	£0.3	£0.1	£2.1	£1.6	£0.9

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7a: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2022

STORE / CENTRE	FIRST CHOICE SMALLER ELECTRICAL GOODS							SECOND CHOICE SMALLER ELECTRICAL GOODS						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£0.3	£0.1	£0.1	£0.8	£0.6	£0.0	£0.0	£0.0	£0.1	£0.0	£0.4	£0.0	£0.0	£0.0
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.0	£0.0	£0.4	£1.3	£0.7	£0.0	£0.2	£0.0	£0.0	£0.8	£0.5	£0.6	£0.0	£0.1
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£1.8	£1.8	£5.1	£6.4	£4.5	£1.0	£2.0	£0.3	£0.3	£1.3	£2.3	£0.8	£0.4	£0.6
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.1	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.1	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.1	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£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
<i>STORES OUTSIDE TORBAY</i>	£3.4	£0.3	£0.6	£0.4	£2.5	£2.8	£2.2	£1.9	£0.5	£0.5	£0.6	£1.9	£1.2	£1.2

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7a: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2022

STORE / CENTRE	FIRST CHOICE HEALTH AND BEAUTY							SECOND CHOICE HEALTH AND BEAUTY						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£0.9	£1.0	£1.1	£12.1	£0.6	£0.0	£0.2	£0.5	£1.0	£2.1	£4.6	£0.9	£0.0	£0.5
<i>THE WILLOWS DISTRICT CENTRE</i>	£1.3	£0.5	£6.7	£15.0	£1.0	£0.4	£1.0	£0.2	£0.5	£2.8	£4.3	£0.3	£0.8	£0.1
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.1	£0.3	£0.5	£0.0	£0.0	£0.0	£0.0	£0.1	£0.5	£0.3	£0.5	£0.0	£0.1
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.1	£0.3	£1.3	£1.8	£0.0	£0.0	£0.5	£0.0	£0.0	£1.2	£0.0	£0.0	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.6	£0.7	£8.7	£0.6	£0.0	£0.0	£0.0	£0.3	£0.6	£2.2	£0.0	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.2	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.7	£2.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.9	£0.4	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.2	£1.6	£0.6	£0.0	£0.0	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£4.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
<i>STORES OUTSIDE TORBAY</i>	£17.3	£1.4	£3.0	£4.6	£26.8	£13.0	£16.1	£7.2	£0.5	£1.7	£4.0	£11.2	£4.9	£6.7

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7a: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2022

STORE / CENTRE	FIRST CHOICE RECREATIONAL GOODS							SECOND CHOICE RECREATIONAL GOODS							TOTAL (£m)
	2	3	4	5	6	7	8	2	3	4	5	6	7	8	
<i>TORQUAY TOWN CENTRE</i>	£0.4	£0.8	£2.5	£10.8	£0.6	£1.4	£0.7	£1.5	£0.6	£1.3	£6.7	£0.4	£0.0	£0.0	£101.2
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.0	£0.4	£0.5	£5.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.8	£0.0	£0.0	£0.2	£107.3
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£0.0	£0.0	£0.0	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£2.9
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£1.1	£0.5	£5.1	£6.1	£1.0	£0.0	£0.0	£1.0	£0.0	£1.2	£3.2	£0.0	£0.0	£0.0	£122.9
<i>OTHER PROVISION, TORQUAY</i>	£1.1	£0.0	£0.8	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£11.4
<i>PAIGNTON TOWN CENTRE</i>	£2.2	£0.6	£10.6	£0.3	£0.0	£0.0	£0.0	£0.0	£0.6	£3.6	£0.0	£0.0	£0.0	£0.0	£46.5
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.2	£0.2	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.6
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£3.0	£3.9	£0.7	£0.0	£0.0	£0.0	£0.0	£0.9	£1.8	£0.4	£0.0	£0.0	£0.0	£28.8
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.6	£0.7	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.2	£0.0	£0.0	£0.0	£8.6
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£3.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£0.0	£0.0	£0.0	£16.2
<i>OTHER PROVISION, BRIXHAM</i>	£0.0	£0.3	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4
<i>STORES OUTSIDE TORBAY</i>	£19.9	£1.3	£2.4	£7.6	£32.4	£16.7	£17.3	£8.1	£0.9	£2.6	£2.8	£14.1	£7.7	£7.5	£548.9

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7b: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2027

STORE / CENTRE	FIRST CHOICE COTHES AND FOOTWEAR							SECOND CHOICE CLOTHES AND FOOTWEAR						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£4.0	£1.0	£4.3	£11.9	£4.9	£0.4	£1.3	£0.9	£0.7	£1.9	£4.4	£0.9	£0.0	£0.5
<i>THE WILLOWS DISTRICT CENTRE</i>	£2.8	£3.6	£7.4	£11.3	£1.3	£2.2	£1.7	£0.6	£1.3	£3.1	£3.9	£2.2	£1.0	£1.4
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.1	£0.8	£1.9	£0.0	£0.0	£0.0	£0.2	£0.0	£0.2	£0.5	£0.0	£0.0	£0.0
<i>OTHER PROVISION, TORQUAY</i>	£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
<i>PAIGNTON TOWN CENTRE</i>	£0.0	£1.5	£3.9	£0.3	£0.0	£0.0	£0.0	£0.3	£0.4	£1.6	£0.2	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.5	£1.1	£1.3	£0.6	£0.0	£0.2	£0.0	£0.0	£0.2	£1.1	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.2	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0
<i>STORES OUTSIDE TORBAY</i>	£13.3	£1.9	£7.7	£8.4	£26.4	£11.2	£14.9	£6.8	£1.3	£3.2	£5.7	£10.9	£4.9	£5.8

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7b: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2027

STORE / CENTRE	FIRST CHOICE FURNITURE AND TEXTILES							SECOND CHOICE FURNITURE AND TEXTILES						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£0.2	£0.4	£0.7	£3.2	£1.8	£0.0	£0.0	£0.4	£0.4	£0.5	£0.8	£0.5	£0.0	£1.3
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.4	£0.7	£3.9	£4.3	£3.4	£0.6	£0.2	£0.8	£0.2	£1.0	£2.3	£1.2	£0.1	£0.4
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.2	£1.2	£3.1	£6.0	£3.7	£0.7	£0.5	£1.1	£0.5	£2.1	£2.5	£1.4	£0.0	£0.0
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.2	£0.0	£0.6	£0.6	£0.0	£0.0	£0.4	£0.1	£0.3	£0.6	£0.0	£0.0	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.2	£0.7	£3.2	£0.2	£0.0	£0.0	£0.0	£0.3	£0.3	£0.4	£0.2	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.9	£0.3	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.5	£0.1	£3.3	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.4	£0.4	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.1	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£2.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£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
<i>STORES OUTSIDE TORBAY</i>	£14.2	£2.1	£3.5	£11.3	£15.1	£9.2	£13.0	£3.7	£1.1	£3.4	£4.3	£7.5	£4.4	£4.2

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7b: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2027

STORE / CENTRE	FIRST CHOICE DIY							SECOND CHOICE DIY						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£0.7	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0	£0.2	£0.1	£0.1	£0.6	£0.1	£0.0	£0.0
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.1	£0.1	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£1.3	£2.2	£9.1	£12.5	£1.2	£0.0	£0.2	£0.4	£0.5	£2.2	£3.3	£0.7	£0.0	£0.2
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.0	£0.1	£0.4	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.2	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£1.0	£0.5	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.2	£0.2	£0.2	£0.0	£0.1	£0.0	£0.0	£0.1	£0.3	£0.2	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.1	£1.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>STORES OUTSIDE TORBAY</i>	£9.1	£0.5	£0.8	£1.4	£12.9	£7.8	£7.9	£4.2	£0.4	£0.9	£1.4	£5.5	£3.2	£3.3

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7b: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2027

STORE / CENTRE	FIRST CHOICE DOMESTIC APPLIANCES							SECOND CHOICE DOMESTIC APPLIANCES						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£0.1	£0.1	£0.0	£0.3	£0.0	£0.0	£0.0	£0.3	£0.1	£0.0	£0.1	£0.3	£0.0	£0.0
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.4	£0.0	£0.2	£0.9	£0.3	£0.0	£0.1	£0.0	£0.0	£0.1	£0.9	£0.1	£0.0	£0.0
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.4	£1.3	£3.2	£4.7	£3.8	£0.4	£1.1	£0.9	£0.4	£1.0	£1.7	£0.4	£0.2	£0.6
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.1	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.1	£0.2	£0.6	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.2	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£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
<i>STORES OUTSIDE TORBAY</i>	£5.0	£0.2	£0.6	£0.4	£3.2	£4.4	£2.4	£1.2	£0.2	£0.4	£0.1	£2.3	£1.8	£1.0

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7b: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2027

STORE / CENTRE	FIRST CHOICE SMALLER ELECTRICAL GOODS							SECOND CHOICE SMALLER ELECTRICAL GOODS						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£0.3	£0.1	£0.2	£0.9	£0.6	£0.0	£0.0	£0.0	£0.1	£0.0	£0.5	£0.0	£0.0	£0.0
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.0	£0.0	£0.4	£1.4	£0.8	£0.0	£0.2	£0.0	£0.0	£0.8	£0.5	£0.7	£0.0	£0.1
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£2.0	£2.0	£5.7	£7.0	£5.1	£1.2	£2.2	£0.3	£0.4	£1.5	£2.5	£0.9	£0.5	£0.7
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.1	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.1	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.1	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£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
<i>STORES OUTSIDE TORBAY</i>	£3.8	£0.4	£0.6	£0.4	£2.8	£3.1	£2.4	£2.1	£0.5	£0.6	£0.6	£2.2	£1.3	£1.3

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7b: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2027

STORE / CENTRE	FIRST CHOICE HEALTH AND BEAUTY							SECOND CHOICE HEALTH AND BEAUTY						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£1.0	£1.1	£1.2	£13.4	£0.7	£0.0	£0.2	£0.5	£1.1	£2.3	£5.1	£1.0	£0.0	£0.5
<i>THE WILLOWS DISTRICT CENTRE</i>	£1.4	£0.6	£7.5	£16.6	£1.1	£0.4	£1.2	£0.2	£0.6	£3.1	£4.8	£0.4	£0.9	£0.2
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.1	£0.3	£0.5	£0.0	£0.0	£0.0	£0.0	£0.1	£0.6	£0.3	£0.6	£0.0	£0.2
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.1	£0.4	£1.4	£2.0	£0.0	£0.0	£0.5	£0.0	£0.0	£1.4	£0.0	£0.0	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.6	£0.8	£9.6	£0.7	£0.0	£0.0	£0.0	£0.3	£0.7	£2.5	£0.0	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.2	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.8	£3.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£1.0	£0.4	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.2	£1.8	£0.7	£0.0	£0.0	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£5.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
<i>STORES OUTSIDE TORBAY</i>	£19.3	£1.6	£3.3	£5.0	£30.3	£14.6	£18.0	£8.1	£0.6	£1.8	£4.4	£12.6	£5.5	£7.4

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7b: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2027

STORE / CENTRE	FIRST CHOICE RECREATIONAL GOODS							SECOND CHOICE RECREATIONAL GOODS							TOTAL (£m)
	2	3	4	5	6	7	8	2	3	4	5	6	7	8	
<i>TORQUAY TOWN CENTRE</i>	£0.5	£0.9	£2.8	£12.0	£0.7	£1.6	£0.8	£1.6	£0.7	£1.5	£7.4	£0.5	£0.0	£0.0	£112.5
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.0	£0.4	£0.6	£6.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.9	£0.0	£0.0	£0.2	£119.2
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£0.0	£0.0	£0.0	£2.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.9	£0.0	£0.0	£0.0	£3.2
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£1.2	£0.5	£5.6	£6.8	£1.1	£0.0	£0.0	£1.2	£0.0	£1.3	£3.5	£0.0	£0.0	£0.0	£136.6
<i>OTHER PROVISION, TORQUAY</i>	£1.2	£0.0	£0.8	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£12.7
<i>PAIGNTON TOWN CENTRE</i>	£2.5	£0.6	£11.7	£0.3	£0.0	£0.0	£0.0	£0.0	£0.7	£4.0	£0.0	£0.0	£0.0	£0.0	£51.5
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.2	£0.2	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£3.3	£4.3	£0.8	£0.0	£0.0	£0.0	£0.0	£1.0	£2.0	£0.4	£0.0	£0.0	£0.0	£31.9
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.6	£0.8	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.3	£0.0	£0.0	£0.0	£9.5
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£3.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£17.9
<i>OTHER PROVISION, BRIXHAM</i>	£0.0	£0.3	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6
<i>STORES OUTSIDE TORBAY</i>	£22.3	£1.4	£2.6	£8.4	£36.7	£18.8	£19.4	£9.1	£1.0	£2.8	£3.1	£16.0	£8.7	£8.4	£615.7

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7c: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2032

STORE / CENTRE	FIRST CHOICE COTHES AND FOOTWEAR							SECOND CHOICE CLOTHES AND FOOTWEAR						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£4.6	£1.1	£4.9	£13.7	£5.7	£0.5	£1.5	£1.0	£0.8	£2.1	£5.0	£1.0	£0.0	£0.5
<i>THE WILLOWS DISTRICT CENTRE</i>	£3.3	£4.1	£8.5	£12.9	£1.5	£2.5	£2.0	£0.6	£1.5	£3.5	£4.5	£2.5	£1.2	£1.6
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.1	£0.9	£2.2	£0.0	£0.0	£0.0	£0.3	£0.0	£0.2	£0.5	£0.0	£0.0	£0.0
<i>OTHER PROVISION, TORQUAY</i>	£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
<i>PAIGNTON TOWN CENTRE</i>	£0.0	£1.7	£4.4	£0.3	£0.0	£0.0	£0.0	£0.4	£0.5	£1.8	£0.2	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.6	£1.2	£1.5	£0.7	£0.0	£0.2	£0.0	£0.0	£0.2	£1.2	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£1.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.2	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0
<i>STORES OUTSIDE TORBAY</i>	£15.3	£2.2	£8.8	£9.6	£30.7	£12.9	£17.2	£7.8	£1.5	£3.7	£6.6	£12.7	£5.7	£6.7

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7c: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2032

STORE / CENTRE	FIRST CHOICE FURNITURE AND TEXTILES							SECOND CHOICE FURNITURE AND TEXTILES						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£0.2	£0.5	£0.8	£3.7	£2.1	£0.0	£0.0	£0.5	£0.4	£0.6	£0.9	£0.5	£0.0	£1.5
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.5	£0.7	£4.4	£4.9	£4.0	£0.7	£0.2	£1.0	£0.3	£1.1	£2.7	£1.4	£0.1	£0.5
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.2	£1.4	£3.6	£6.9	£4.3	£0.8	£0.5	£1.2	£0.6	£2.4	£2.9	£1.7	£0.0	£0.0
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.2	£0.0	£0.7	£0.7	£0.0	£0.0	£0.5	£0.1	£0.4	£0.7	£0.0	£0.0	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.2	£0.8	£3.7	£0.2	£0.0	£0.0	£0.0	£0.3	£0.3	£0.4	£0.2	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£1.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.6	£0.1	£3.8	£0.2	£0.0	£0.0	£0.0	£0.0	£0.1	£0.4	£0.5	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.1	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£2.6	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£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
<i>STORES OUTSIDE TORBAY</i>	£16.3	£2.4	£4.0	£12.9	£17.7	£10.7	£15.0	£4.2	£1.2	£3.9	£5.0	£8.7	£5.1	£4.8

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7c: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2032

STORE / CENTRE	FIRST CHOICE DIY							SECOND CHOICE DIY						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£0.8	£0.1	£0.1	£0.4	£0.0	£0.0	£0.0	£0.2	£0.1	£0.1	£0.7	£0.1	£0.0	£0.0
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.1	£0.1	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£1.5	£2.5	£10.4	£14.4	£1.4	£0.0	£0.2	£0.5	£0.6	£2.5	£3.8	£0.8	£0.0	£0.2
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.0	£0.2	£0.4	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.2	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£1.2	£0.6	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.2	£0.2	£0.2	£0.0	£0.1	£0.0	£0.0	£0.1	£0.3	£0.2	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.1	£1.7	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>STORES OUTSIDE TORBAY</i>	£10.4	£0.5	£0.9	£1.6	£15.1	£9.0	£9.1	£4.8	£0.5	£1.0	£1.6	£6.4	£3.8	£3.8

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7c: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2032

STORE / CENTRE	FIRST CHOICE DOMESTIC APPLIANCES							SECOND CHOICE DOMESTIC APPLIANCES						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£0.2	£0.1	£0.1	£0.3	£0.0	£0.0	£0.0	£0.3	£0.1	£0.1	£0.1	£0.3	£0.0	£0.0
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.4	£0.0	£0.2	£1.0	£0.3	£0.0	£0.1	£0.0	£0.0	£0.1	£1.0	£0.2	£0.0	£0.0
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.4	£1.5	£3.7	£5.4	£4.4	£0.5	£1.3	£1.1	£0.4	£1.2	£2.0	£0.5	£0.2	£0.6
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.1	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.2	£0.2	£0.7	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.2	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£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
<i>STORES OUTSIDE TORBAY</i>	£5.8	£0.2	£0.7	£0.5	£3.7	£5.1	£2.7	£1.4	£0.3	£0.4	£0.1	£2.7	£2.1	£1.2

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7c: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2032

STORE / CENTRE	FIRST CHOICE SMALLER ELECTRICAL GOODS							SECOND CHOICE SMALLER ELECTRICAL GOODS						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£0.4	£0.1	£0.2	£1.0	£0.8	£0.0	£0.0	£0.0	£0.2	£0.0	£0.6	£0.0	£0.0	£0.0
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.0	£0.0	£0.5	£1.6	£0.9	£0.0	£0.2	£0.0	£0.0	£0.9	£0.6	£0.8	£0.0	£0.1
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£2.3	£2.2	£6.5	£8.1	£5.9	£1.3	£2.6	£0.4	£0.4	£1.7	£2.9	£1.0	£0.6	£0.8
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.1	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.0	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.1	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.1	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.1	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£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
<i>STORES OUTSIDE TORBAY</i>	£4.4	£0.4	£0.7	£0.5	£3.3	£3.6	£2.8	£2.4	£0.6	£0.7	£0.7	£2.5	£1.6	£1.5

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7c: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2032

STORE / CENTRE	FIRST CHOICE HEALTH AND BEAUTY							SECOND CHOICE HEALTH AND BEAUTY						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£1.1	£1.3	£1.3	£15.4	£0.8	£0.0	£0.2	£0.6	£1.3	£2.7	£5.9	£1.2	£0.0	£0.6
<i>THE WILLOWS DISTRICT CENTRE</i>	£1.6	£0.7	£8.5	£19.1	£1.3	£0.5	£1.3	£0.2	£0.7	£3.5	£5.5	£0.5	£1.1	£0.2
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.1	£0.3	£0.6	£0.0	£0.0	£0.0	£0.0	£0.1	£0.6	£0.3	£0.7	£0.0	£0.2
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.1	£0.4	£1.6	£2.3	£0.0	£0.0	£0.6	£0.0	£0.0	£1.6	£0.0	£0.0	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.7	£0.9	£11.0	£0.8	£0.0	£0.0	£0.0	£0.4	£0.8	£2.8	£0.0	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.2	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.9	£3.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£1.1	£0.5	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.2	£2.1	£0.8	£0.0	£0.0	£0.0	£0.0	£0.2	£0.1	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£5.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
<i>STORES OUTSIDE TORBAY</i>	£22.2	£1.8	£3.8	£5.8	£35.4	£17.0	£20.7	£9.3	£0.7	£2.1	£5.1	£14.7	£6.4	£8.6

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7c: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2032

STORE / CENTRE	FIRST CHOICE RECREATIONAL GOODS							SECOND CHOICE RECREATIONAL GOODS							TOTAL (£m)
	2	3	4	5	6	7	8	2	3	4	5	6	7	8	
<i>TORQUAY TOWN CENTRE</i>	£0.6	£1.1	£3.2	£13.7	£0.8	£1.8	£0.9	£1.9	£0.8	£1.7	£8.5	£0.6	£0.0	£0.0	£129.3
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.0	£0.4	£0.7	£6.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£1.0	£0.0	£0.0	£0.3	£137.0
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£0.0	£0.0	£0.0	£2.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.1	£0.0	£0.0	£0.0	£3.7
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£1.4	£0.6	£6.4	£7.8	£1.3	£0.0	£0.0	£1.3	£0.0	£1.5	£4.1	£0.0	£0.0	£0.0	£156.9
<i>OTHER PROVISION, TORQUAY</i>	£1.4	£0.0	£1.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£14.6
<i>PAIGNTON TOWN CENTRE</i>	£2.9	£0.7	£13.4	£0.4	£0.0	£0.0	£0.0	£0.0	£0.8	£4.6	£0.0	£0.0	£0.0	£0.0	£58.8
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.3	£0.3	£0.6	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£4.6
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£3.7	£4.9	£0.9	£0.0	£0.0	£0.0	£0.0	£1.2	£2.3	£0.5	£0.0	£0.0	£0.0	£36.4
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.7	£0.9	£1.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.3	£0.0	£0.0	£0.0	£10.8
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£4.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.6	£0.0	£0.0	£0.0	£0.0	£0.0	£20.4
<i>OTHER PROVISION, BRIXHAM</i>	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£1.8
<i>STORES OUTSIDE TORBAY</i>	£25.6	£1.6	£3.0	£9.6	£42.7	£21.8	£22.3	£10.4	£1.2	£3.2	£3.6	£18.6	£10.1	£9.7	£711.6

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7d: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2040

STORE / CENTRE	FIRST CHOICE COTHES AND FOOTWEAR							SECOND CHOICE CLOTHES AND FOOTWEAR						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£5.7	£1.4	£6.1	£17.1	£7.2	£0.6	£1.8	£1.3	£1.0	£2.6	£6.3	£1.3	£0.0	£0.7
<i>THE WILLOWS DISTRICT CENTRE</i>	£4.1	£5.0	£10.5	£16.2	£1.9	£3.2	£2.4	£0.8	£1.8	£4.4	£5.6	£3.2	£1.5	£2.0
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.1	£1.2	£2.7	£0.0	£0.0	£0.0	£0.3	£0.0	£0.3	£0.7	£0.0	£0.0	£0.0
<i>OTHER PROVISION, TORQUAY</i>	£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
<i>PAIGNTON TOWN CENTRE</i>	£0.0	£2.1	£5.5	£0.4	£0.0	£0.0	£0.0	£0.5	£0.6	£2.2	£0.3	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.7	£1.5	£1.8	£0.9	£0.0	£0.2	£0.0	£0.0	£0.3	£1.5	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£1.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.2	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0
<i>STORES OUTSIDE TORBAY</i>	£19.0	£2.7	£10.9	£12.1	£39.1	£16.4	£21.3	£9.7	£1.9	£4.6	£8.2	£16.1	£7.2	£8.3

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7d: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2040

STORE / CENTRE	FIRST CHOICE FURNITURE AND TEXTILES							SECOND CHOICE FURNITURE AND TEXTILES						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£0.3	£0.6	£1.0	£4.6	£2.6	£0.0	£0.0	£0.6	£0.5	£0.7	£1.1	£0.7	£0.0	£1.8
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.6	£0.9	£5.5	£6.2	£5.1	£0.9	£0.3	£1.2	£0.3	£1.4	£3.3	£1.7	£0.2	£0.6
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.3	£1.7	£4.4	£8.6	£5.5	£1.0	£0.7	£1.5	£0.8	£3.0	£3.7	£2.1	£0.0	£0.0
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.3	£0.0	£0.9	£0.9	£0.0	£0.0	£0.6	£0.1	£0.4	£0.9	£0.0	£0.0	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.3	£1.0	£4.5	£0.3	£0.0	£0.0	£0.0	£0.4	£0.4	£0.6	£0.2	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£1.3	£0.4	£0.0	£0.0	£0.0	£0.0	£0.2	£0.3	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.7	£0.2	£4.7	£0.3	£0.0	£0.0	£0.0	£0.0	£0.1	£0.5	£0.6	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.1	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£3.1	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£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
<i>STORES OUTSIDE TORBAY</i>	£20.2	£2.9	£5.0	£16.2	£22.5	£13.5	£18.6	£5.2	£1.5	£4.8	£6.2	£11.1	£6.5	£5.9

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7d: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2040

STORE / CENTRE	FIRST CHOICE DIY							SECOND CHOICE DIY						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£1.0	£0.1	£0.1	£0.5	£0.0	£0.0	£0.0	£0.3	£0.1	£0.2	£0.8	£0.1	£0.0	£0.0
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.1	£0.1	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.2	£0.0
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£1.9	£3.1	£12.9	£18.0	£1.8	£0.0	£0.2	£0.6	£0.8	£3.1	£4.8	£1.0	£0.0	£0.3
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.4	£0.0	£0.0	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.0	£0.2	£0.5	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.3	£0.9	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£1.5	£0.7	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.2	£0.3	£0.2	£0.0	£0.1	£0.0	£0.0	£0.2	£0.4	£0.3	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.1	£2.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.8	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>STORES OUTSIDE TORBAY</i>	£12.9	£0.7	£1.2	£2.0	£19.2	£11.4	£11.3	£6.0	£0.6	£1.3	£2.0	£8.2	£4.8	£4.7

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7d: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2040

STORE / CENTRE	FIRST CHOICE DOMESTIC APPLIANCES							SECOND CHOICE DOMESTIC APPLIANCES						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£0.2	£0.2	£0.1	£0.4	£0.0	£0.0	£0.0	£0.4	£0.1	£0.1	£0.2	£0.4	£0.0	£0.0
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.5	£0.0	£0.3	£1.3	£0.4	£0.0	£0.2	£0.0	£0.0	£0.2	£1.2	£0.2	£0.0	£0.0
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.5	£1.8	£4.5	£6.7	£5.6	£0.6	£1.6	£1.3	£0.5	£1.4	£2.5	£0.7	£0.2	£0.8
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.1	£0.0	£0.2	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.2	£0.3	£0.8	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.1	£0.4	£0.1	£0.0	£0.0	£0.0	£0.2	£0.2	£0.2	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£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
<i>STORES OUTSIDE TORBAY</i>	£7.2	£0.3	£0.8	£0.6	£4.7	£6.5	£3.4	£1.7	£0.3	£0.5	£0.2	£3.5	£2.7	£1.4

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7d: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2040

STORE / CENTRE	FIRST CHOICE SMALLER ELECTRICAL GOODS							SECOND CHOICE SMALLER ELECTRICAL GOODS						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£0.5	£0.1	£0.2	£1.2	£1.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.7	£0.0	£0.0	£0.0
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.0	£0.0	£0.6	£2.0	£1.2	£0.0	£0.3	£0.0	£0.0	£1.2	£0.7	£1.0	£0.0	£0.2
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£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
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£2.8	£2.8	£8.0	£10.1	£7.5	£1.7	£3.2	£0.5	£0.5	£2.1	£3.6	£1.3	£0.7	£0.9
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.2	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.0	£0.3	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1	£0.2	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.1	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.1	£0.3	£0.0	£0.0	£0.0	£0.0	£0.2	£0.3	£0.1	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£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
<i>STORES OUTSIDE TORBAY</i>	£5.5	£0.5	£0.9	£0.6	£4.2	£4.6	£3.5	£3.0	£0.7	£0.9	£0.9	£3.2	£2.0	£1.9

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7d: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2040

STORE / CENTRE	FIRST CHOICE HEALTH AND BEAUTY							SECOND CHOICE HEALTH AND BEAUTY						
	2	3	4	5	6	7	8	2	3	4	5	6	7	8
<i>TORQUAY TOWN CENTRE</i>	£1.4	£1.6	£1.7	£19.2	£1.0	£0.0	£0.3	£0.7	£1.6	£3.3	£7.3	£1.5	£0.0	£0.8
<i>THE WILLOWS DISTRICT CENTRE</i>	£2.0	£0.8	£10.6	£23.8	£1.6	£0.6	£1.7	£0.3	£0.8	£4.3	£6.8	£0.6	£1.4	£0.2
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£0.0	£0.0	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£0.1	£0.4	£0.7	£0.0	£0.0	£0.0	£0.0	£0.1	£0.8	£0.4	£0.9	£0.0	£0.2
<i>OTHER PROVISION, TORQUAY</i>	£0.0	£0.1	£0.5	£2.0	£3.0	£0.0	£0.0	£0.7	£0.0	£0.0	£2.0	£0.0	£0.0	£0.0
<i>PAIGNTON TOWN CENTRE</i>	£0.9	£1.1	£13.6	£1.0	£0.0	£0.0	£0.0	£0.4	£1.0	£3.5	£0.0	£0.0	£0.0	£0.0
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.3	£0.0	£0.0	£0.0
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£1.1	£4.4	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£1.3	£0.6	£0.0	£0.0	£0.0
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.2	£2.6	£0.9	£0.0	£0.0	£0.0	£0.0	£0.3	£0.2	£0.0	£0.0	£0.0	£0.0
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£7.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0
<i>OTHER PROVISION, BRIXHAM</i>	£0.0	£0.4	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.0	£0.0	£0.0	£0.0
<i>STORES OUTSIDE TORBAY</i>	£27.6	£2.2	£4.6	£7.2	£45.0	£21.5	£25.7	£11.5	£0.8	£2.6	£6.3	£18.8	£8.1	£10.6

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 7d: TURNOVER OF COMPARISON GOODS DESTINATIONS, 2040

STORE / CENTRE	FIRST CHOICE RECREATIONAL GOODS							SECOND CHOICE RECREATIONAL GOODS							TOTAL (£m)
	2	3	4	5	6	7	8	2	3	4	5	6	7	8	
<i>TORQUAY TOWN CENTRE</i>	£0.7	£1.3	£4.0	£17.2	£1.1	£2.3	£1.1	£2.3	£1.0	£2.1	£10.6	£0.7	£0.0	£0.0	£161.4
<i>THE WILLOWS DISTRICT CENTRE</i>	£0.0	£0.5	£0.8	£8.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£1.3	£0.0	£0.0	£0.3	£171.0
<i>ST MARYCHURCH DISTRICT CENTRE</i>	£0.0	£0.0	£0.0	£2.8	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£0.0	£0.0	£0.0	£4.6
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£1.7	£0.7	£7.9	£9.8	£1.6	£0.0	£0.0	£1.7	£0.0	£1.9	£5.1	£0.0	£0.0	£0.0	£195.8
<i>OTHER PROVISION, TORQUAY</i>	£1.7	£0.0	£1.2	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£18.3
<i>PAIGNTON TOWN CENTRE</i>	£3.6	£0.9	£16.6	£0.5	£0.0	£0.0	£0.0	£0.0	£1.0	£5.7	£0.0	£0.0	£0.0	£0.0	£72.8
<i>PRESTON DISTRICT CENTRE</i>	£0.0	£0.3	£0.3	£0.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£5.7
<i>OUT OF CENTRE RETAIL WAREHOUSES</i>	£0.0	£4.6	£6.1	£1.1	£0.0	£0.0	£0.0	£0.0	£1.4	£2.9	£0.6	£0.0	£0.0	£0.0	£45.1
<i>OTHER PROVISION, PAIGNTON</i>	£0.0	£0.9	£1.1	£2.2	£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£0.4	£0.0	£0.0	£0.0	£13.4
<i>BRIXHAM TOWN CENTRE</i>	£0.0	£5.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£2.0	£0.0	£0.0	£0.0	£0.0	£0.0	£25.0
<i>OTHER PROVISION, BRIXHAM</i>	£0.0	£0.4	£0.3	£0.0	£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£2.2
<i>STORES OUTSIDE TORBAY</i>	£31.8	£1.9	£3.7	£12.0	£54.4	£27.6	£27.7	£12.9	£1.4	£4.0	£4.5	£23.7	£12.8	£12.0	£892.9

Notes:

Turnover calculated by applying market shares to available expenditure, by zone.

TABLE 8a: CONVENIENCE FLOORSPACE BENCHMARK TURNOVER

STORE / CENTRE	FLOORSPACE (sq m net) Convenience	SALES DENSITY (£/sq m)	TOTAL TURNOVER (£m)
TORQUAY TOWN CENTRE			
Iceland, Union Square Shopping Centre, Torquay	397	£7,568	£3.0
Tesco Express, Fleet Street, Torquay Town Centre	839	£14,304	£12.0
Torquay TOWN CENTRE			£1.1
THE WILLOWS DISTRICT CENTRE			
Marks & Spencer, The Willows, Torquay	1400	£11,275	£15.8
Sainsburys Superstore, Nicholson Road, The Willows, Torquay	3235	£12,685	£41.0
The Willows Local Centre, Torquay			£0.5
ST MARYCHURCH			
Co-op, Fore Street, St Marychurch, Torquay	264	£11,169	£2.9
Sainsburys Local, St Marychurch, Torquay, TQ1 4LY	234	£12,685	£3.0
Tesco Express, Babacombe Road, Torquay	300	£14,304	£4.3
St Marychurch Local Centre, Torquay			£1.0
LOCAL RETAIL PROVISION			
Lidl, St Marychurch Road, Torquay	1050	£8,883	£9.3
Other			£30.4
OUT OF CENTRE STORES			
Asda, Newton Road, Torquay	1383	£14,480	£20.0
Lidl, Newton Road, Torquay	1600	£8,883	£14.2
PAIGNTON TOWN CENTRE			
Co-op, Winner Street / Palace Avenue, Paignton	280	£11,169	£3.1
Iceland, Victoria Street, Paignton	302	£7,568	£2.3
Lidl, Victoria Centre, Paignton	1236	£8,883	£11.0
Tesco Express, Victoria Street, Paignton	284	£14,304	£4.1
Paignton TOWN CENTRE			£1.4
PRESTON DISTRICT CENTRE			
Sainsburys Local, Torquay Road, Preston, Paignton	333.2	£12,685	£4.2
Spar, Torquay Road, Preston, Paignton	100	£7,303	£0.7
Tesco Express, Concord House, Paignton	248.4458478	£14,304	£3.6
Post Office, Preston Down Road, Paignton, TQ3 1DS			£0.1
LOCAL RETAIL PROVISION			
Aldi, Brixham Road, Paignton	912	£11,199	£10.2
Lidl, White Rock, Waddeton Close, Paignton	1069	£8,883	£9.5
Other, local retail provision			£8.0
OUT OF CENTRE STORES			
Asda, Borough Close, Paignton	1198	£14,480	£17.3
Iceland (Food Warehouse), Devonshire Retail Park, Paignton	855.2	£7,568	£6.5
Morrisons, Totnes Road, Paignton	2926	£13,154	£38.5
Sainsburys Superstore, Yalberton Road, Paignton	2955	£12,685	£37.5
BRIXHAM TOWN CENTRE			
Co-op, 14-16 Fore Street, Brixham (middle of town centre)	95	£11,169	£1.1
Co-op, 75 Fore Street, Brixham (closer to sea front)	95	£11,169	£1.1
Tesco Express, Fore Street, Brixham	95	£14,304	£1.4
Brixham TOWN CENTRE			£3.3
OTHER STORES IN BRIXHAM			
			£7.2

Notes:

Floorspace taken from: previous retail studies, planning application data and IGD data.
Sales density information for named foodstores provided by GlobalData.
For other stores, existing turnover assumed to equal benchmark turnover at 2022.

TABLE 8b: COMMITMENTS

COMMITMENT	FLOORSPACE (sq m)			SALES DENSITY (£/SQ M)			TURNOVER (£m)		
	Convenience	Comparison	F&B	Convenience	Comparison	F&B	Convenience	Comparison	F&B
Lidl, Great Parks, Paignton	1128	282	174	£8,883	£4,789	£3,000	£10.0	£1.4	£0.5
<i>Devon Garden Machinery, Torquay</i>									
ALDI foodstore	1052	263	0	11199	7876	0	£11.8	£2.1	£0.0
Coffee shop	0	0	167	0	0	3000	£0.0	£0.0	£0.5
Units 2/3 Devonshire Retail Park, Paignton	0	-756	0	0	4000	0	£0.0	-£3.0	£0.0
Inglewood			400			3000	£0.0	£0.0	£1.2
Former BHS, Union Street, Torquay (now cinema)	0	-2792.8	0	0	4000	0	£0.0	-£11.2	£0.0
<i>Crossways Shopping Centre, Paignton</i>				<i>REDUCTION IN CLASS E GROUND FLOOR SPACE (sq m gross) =</i>					
									2770

Notes:

TABLE 9a: CONVENIENCE GOODS FLOORSPACE CAPACITY - TORQUAY

	2022	2027	2032	2040
Available expenditure within the study area (£m)	£739.1	£750.7	£771.5	£801.5
Turnover derived from the study area (£m)	£177.6	£178.2	£183.1	£190.3
Market share (%)	24.0%	23.7%	23.7%	23.7%
Expenditure inflow (£m)	£21.8	£21.9	£22.5	£23.4
Total turnover potential (£m)	£199.4	£200.1	£205.7	£213.7
Benchmark turnover (£m)	£158.6	£161.8	£162.0	£162.0
Turnover of commitments (£m)	£11.8	£12.0	£12.0	£12.0
RESIDUAL EXPENDITURE (£m)	£29.0	£26.3	£31.7	£39.7
Indicative sales density (£/sq m)	£13,000	£13,261	£13,274	£13,274
INDICATIVE FLOORSPACE CAPACITY (sq m net)	2232	1984	2386	2990

Notes:

Available study area expenditure taken from Tables 3a-3d.

Turnover from study area taken from Tables 5a-5d.

Expenditure inflow assumed to be a constant 12.3% of study area derived expenditure over the assessment period.

Market share for convenience goods stores in Torquay has been reduced to take into account trading impact of committed Lidl in Paignton (Kings Ash Road).

Benchmark turnover level taken from Table 8a.

Turnover of commitments taken from Table 8b.

Sales density of new convenience goods floorspace (£13,000/sq m at 2022) is indicative only.

Benchmark turnover, turnover of commitments and sales density for new floorspace influenced by advice from Experian regarding changing floorspace efficiency levels between 2022-2040.

TABLE 9b: CONVENIENCE GOODS FLOORSPACE CAPACITY - PAIGNTON

	2022	2027	2032	2040
Available expenditure within the study area (£m)	£739.1	£750.7	£771.5	£801.5
Turnover derived from the study area (£m)	£153.1	£156.3	£160.6	£166.9
Market share (%)	20.7%	20.8%	20.8%	20.8%
Expenditure inflow (£m)	£18.8	£19.2	£19.8	£20.5
Total turnover potential (£m)	£172.0	£175.5	£180.4	£187.4
Benchmark turnover (£m)	£157.9	£161.1	£161.2	£161.2
Turnover of commitments (£m)	£10.0	£10.2	£10.2	£10.2
RESIDUAL EXPENDITURE (£m)	£4.1	£4.2	£8.9	£15.9
Indicative sales density (£/sq m)	£13,000	£13,261	£13,274	£13,274
INDICATIVE FLOORSPACE CAPACITY (sq m net)	312	319	672	1202

Notes:

Available study area expenditure taken from Tables 3a-3d.

Turnover from study area taken from Tables 5a-5d.

Expenditure inflow assumed to be a constant 12.3% of study area derived expenditure over the assessment period.

Market share for convenience goods stores in Paignton has been increased to take into account trading impact of committed Lidl in Paignton (Kings Ash Road).

Benchmark turnover level taken from Table 8a.

Turnover of commitments taken from Table 8b.

Sales density of new convenience goods floorspace (£13,000/sq m at 2022) is indicative only.

Benchmark turnover, turnover of commitments and sales density for new floorspace influenced by advice from Experian regarding changing floorspace efficiency levels between 2022-2040.

TABLE 9c: CONVENIENCE GOODS FLOORSPACE CAPACITY - BRIXHAM

	2022	2027	2032	2040
Available expenditure within the study area (£m)	£739.1	£750.7	£771.5	£801.5
Turnover derived from the study area (£m)	£17.1	£17.2	£17.7	£18.4
Market share (%)	2.3%	2.3%	2.3%	2.3%
Expenditure inflow (£m)	£2.1	£2.1	£2.2	£2.3
Total turnover potential (£m)	£19.2	£19.4	£19.9	£20.7
Benchmark turnover (£m)	£14.0	£14.3	£14.3	£14.3
Turnover of commitments (£m)	£0.0	£0.0	£0.0	£0.0
RESIDUAL EXPENDITURE (£m)	£5.3	£5.1	£5.6	£6.4
Indicative sales density (£/sq m)	£13,000	£13,261	£13,274	£13,274
INDICATIVE FLOORSPACE CAPACITY (sq m net)	404	383	422	481

Notes:

Available study area expenditure taken from Tables 3a-3d.

Turnover from study area taken from Tables 5a-5d.

Expenditure inflow assumed to be a constant 12.3% of study area derived expenditure over the assessment period.

Benchmark turnover level taken from Table 8a.

Turnover of commitments taken from Table 8b.

Sales density of new convenience goods floorspace (£13,000/sq m at 2022) is indicative only.

Benchmark turnover, turnover of commitments and sales density for new floorspace influenced by advice from Experian regarding changing floorspace efficiency levels between 2022-2040.

TABLE 10a: COMPARISON GOODS FLOORSAPCE CAPACITY - TORQUAY ([LINK TO PREVIOUS STUDY](#))

	2022	2027	2032	2040
Available expenditure within the study area (£m)	£999.8	£1,116.2	£1,286.0	£1,608.2
Turnover derived from the study area (£m)	£345.7	£384.2	£441.5	£551.1
Market share (%)	34.6%	34.4%	34.3%	34.3%
Expenditure inflow (£m)	£45.3	£50.3	£57.8	£72.2
Total turnover potential (£m)	£391.0	£434.5	£499.3	£623.3
Benchmark turnover (£m)	£414.2	£462.2	£523.5	£642.8
Turnover of commitments (£m)	-£7.7	-£8.6	-£9.8	-£12.0
RESIDUAL EXPENDITURE (£m)	-£15.4	-£19.1	-£14.3	-£7.5
Indicative sales density (£/sq m)	£5,500	£6,138	£6,952	£8,536
INDICATIVE FLOORSAPCE CAPACITY (sq m net)	-2797	-3108	-2064	-876

Notes:

Available study area expenditure taken from Tables 3a-3d.

Turnover from study area taken from Tables 5a-5d.

Expenditure inflow assumed to be a constant 13.1% of study area derived expenditure over the assessment period.

Benchmark turnover level taken from Table 8a.

Turnover of commitments taken from Table 8b.

Sales density of new comparison goods floorspace (£6,000/sq m at 2022) is indicative only.

Benchmark turnover, turnover of commitments and sales density for new floorspace influenced by advice from Experian regarding changing floorspace efficiency levels between 2022-2040.

TABLE 10b: COMPARISON GOODS FLOORSAPCE CAPACITY - TORQUAY (EQUILIBRIUM)

	2022	2027	2032	2040
Available expenditure within the study area (£m)	£999.8	£1,116.2	£1,286.0	£1,608.2
Turnover derived from the study area (£m)	£345.7	£384.2	£441.5	£551.1
Market share (%)	34.6%	34.4%	34.3%	34.3%
Expenditure inflow (£m)	£45.3	£50.3	£57.8	£72.2
Total turnover potential (£m)	£391.0	£434.5	£499.3	£623.3
Benchmark turnover (£m)	£391.0	£436.4	£494.2	£606.9
Turnover of commitments (£m)	-£7.7	-£8.6	-£9.8	-£12.0
RESIDUAL EXPENDITURE (£m)	£7.7	£6.7	£14.9	£28.4
Indicative sales density (£/sq m)	£5,500	£6,138	£6,952	£8,536
INDICATIVE FLOORSAPCE CAPACITY (sq m net)	1409	1098	2142	3331

Notes:

Available study area expenditure taken from Tables 3a-3d.

Turnover from study area taken from Tables 5a-5d.

Expenditure inflow assumed to be a constant 13.1% of study area derived expenditure over the assessment period.

Benchmark turnover level taken from Table 8a.

Turnover of commitments taken from Table 8b.

Sales density of new comparison goods floorspace (£6,000/sq m at 2022) is indicative only.

Benchmark turnover, turnover of commitments and sales density for new floorspace influenced by advice from Experian regarding changing floorspace efficiency levels between 2022-2040.

TABLE 10c: COMPARISON GOODS FLOORSPACE CAPACITY - PAIGNTON (LINK TO PREVIOUS STUDY)

	2022	2027	2032	2040
Available expenditure within the study area (£m)	£999.8	£1,116.2	£1,286.0	£1,608.2
Turnover derived from the study area (£m)	£87.5	£96.9	£110.7	£137.0
Market share (%)	8.8%	8.7%	8.6%	8.5%
Expenditure inflow (£m)	£11.5	£12.7	£14.5	£17.9
Total turnover potential (£m)	£99.0	£109.6	£125.2	£154.9
Benchmark turnover (£m)	£79.1	£88.2	£99.9	£122.7
Turnover of commitments (£m)	-£3.0	-£3.4	-£3.8	-£4.7
RESIDUAL EXPENDITURE (£m)	£22.9	£24.8	£29.1	£36.9
Indicative sales density (£/sq m)	£5,500	£6,138	£6,952	£8,536
INDICATIVE FLOORSPACE CAPACITY (sq m net)	4169	4033	4187	4326

Notes:

Available study area expenditure taken from Tables 3a-3d.

Turnover from study area taken from Tables 5a-5d.

Expenditure inflow assumed to be a constant 13.1% of study area derived expenditure over the assessment period.

Benchmark turnover level taken from Table 8a.

Turnover of commitments taken from Table 8b.

Sales density of new comparison goods floorspace (£6,000/sq m at 2022) is indicative only.

Benchmark turnover, turnover of commitments and sales density for new floorspace influenced by advice from Experian regarding changing floorspace efficiency levels between 2022-2040.

TABLE 10d: COMPARISON GOODS FLOORSPACE CAPACITY - PAIGNTON (EQUILIBRIUM)

	2022	2027	2032	2040
Available expenditure within the study area (£m)	£999.8	£1,116.2	£1,286.0	£1,608.2
Turnover derived from the study area (£m)	£87.5	£96.9	£110.7	£137.0
Market share (%)	8.8%	8.7%	8.6%	8.5%
Expenditure inflow (£m)	£11.5	£12.7	£14.5	£17.9
Total turnover potential (£m)	£99.0	£109.6	£125.2	£154.9
Benchmark turnover (£m)	£99.0	£110.4	£125.1	£153.6
Turnover of commitments (£m)	-£3.0	-£3.4	-£3.8	-£4.7
RESIDUAL EXPENDITURE (£m)	£3.0	£2.5	£3.9	£6.0
Indicative sales density (£/sq m)	£5,500	£6,138	£6,952	£8,536
INDICATIVE FLOORSPACE CAPACITY (sq m net)	550	413	568	707

Notes:

Available study area expenditure taken from Tables 3a-3d.

Turnover from study area taken from Tables 5a-5d.

Expenditure inflow assumed to be a constant 13.1% of study area derived expenditure over the assessment period.

Benchmark turnover level taken from Table 8a.

Turnover of commitments taken from Table 8b.

Sales density of new comparison goods floorspace (£6,000/sq m at 2022) is indicative only.

Benchmark turnover, turnover of commitments and sales density for new floorspace influenced by advice from Experian regarding changing floorspace efficiency levels between 2022-2040.

TABLE 10e: COMPARISON GOODS FLOORSAPCE CAPACITY - BRIXHAM (LINK TO PREVIOUS STUDY)

	2022	2027	2032	2040
Available expenditure within the study area (£m)	£999.8	£1,116.2	£1,286.0	£1,608.2
Turnover derived from the study area (£m)	£17.6	£19.5	£22.1	£27.2
Market share (%)	1.8%	1.7%	1.7%	1.7%
Expenditure inflow (£m)	£2.3	£2.6	£2.9	£3.6
Total turnover potential (£m)	£19.9	£22.0	£25.0	£30.8
Benchmark turnover (£m)	£14.9	£16.7	£18.9	£23.2
Turnover of commitments (£m)	£0.0	£0.0	£0.0	£0.0
RESIDUAL EXPENDITURE (£m)	£5.0	£5.4	£6.2	£7.6
Indicative sales density (£/sq m)	£5,500	£6,138	£6,952	£8,536
INDICATIVE FLOORSAPCE CAPACITY (sq m net)	910	874	887	890

Notes:

Available study area expenditure taken from Tables 3a-3d.

Turnover from study area taken from Tables 5a-5d.

Expenditure inflow assumed to be a constant 13.1% of study area derived expenditure over the assessment period.

Benchmark turnover level taken from Table 8a.

Turnover of commitments taken from Table 8b.

Sales density of new comparison goods floorspace (£6,000/sq m at 2022) is indicative only.

Benchmark turnover, turnover of commitments and sales density for new floorspace influenced by advice from Experian regarding changing floorspace efficiency levels between 2022-2040.

TABLE 10f: COMPARISON GOODS FLOORSPACE CAPACITY - BRIXHAM (EQUILIBRIUM)

	2022	2027	2032	2040
Available expenditure within the study area (£m)	£999.8	£1,116.2	£1,286.0	£1,608.2
Turnover derived from the study area (£m)	£17.6	£19.5	£22.1	£27.2
Market share (%)	1.8%	1.7%	1.7%	1.7%
Expenditure inflow (£m)	£2.3	£2.6	£2.9	£3.6
Total turnover potential (£m)	£19.9	£22.0	£25.0	£30.8
Benchmark turnover (£m)	£19.9	£22.3	£25.2	£30.9
Turnover of commitments (£m)	£0.0	£0.0	£0.0	£0.0
RESIDUAL EXPENDITURE (£m)	£0.0	-£0.2	-£0.2	-£0.2
Indicative sales density (£/sq m)	£5,500	£6,138	£6,952	£8,536
INDICATIVE FLOORSPACE CAPACITY (sq m net)	0	-36	-23	-20

Notes:

Available study area expenditure taken from Tables 3a-3d.

Turnover from study area taken from Tables 5a-5d.

Expenditure inflow assumed to be a constant 13.1% of study area derived expenditure over the assessment period.

Benchmark turnover level taken from Table 8a.

Turnover of commitments taken from Table 8b.

Sales density of new comparison goods floorspace (£6,000/sq m at 2022) is indicative only.

Benchmark turnover, turnover of commitments and sales density for new floorspace influenced by advice from Experian regarding changing floorspace efficiency levels between 2022-2040.

TABLE 11a: FOOD AND BEVERAGE MARKET SHARES WITHIN THE STUDY AREA

	CAFES AND RESTAURANTS							PUBS AND BARS							TOTAL							
	2	3	4	5	6	7	8	2	3	4	5	6	7	8	2	3	4	5	6	7	8	
TORQUAY																						
Torquay TOWN CENTRE	0.00%	3.09%	25.89%	62.33%	17.29%	0.00%	2.74%	2.43%	7.34%	25.79%	55.14%	7.86%	0.00%	1.96%	0.49%	3.94%	25.87%	60.89%	15.40%	0.00%	2.58%	
St Marychurch Local Centre, Torquay	0.00%	0.00%	1.25%	4.42%	2.04%	0.00%	0.00%	0.00%	0.00%	1.98%	3.49%	0.00%	0.00%	0.00%	0.00%	0.00%	1.39%	4.23%	1.63%	0.00%	0.00%	
The Willows	0.00%	0.00%	2.50%	2.63%	0.00%	0.00%	2.33%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.00%	2.11%	0.00%	0.00%	1.87%	
Other - Torquay	0.00%	0.00%	4.17%	6.85%	2.04%	2.85%	1.17%	0.00%	1.14%	4.65%	17.88%	0.00%	2.74%	0.00%	0.00%	0.23%	4.27%	9.06%	1.63%	2.83%	0.93%	
PAIGNTON																						
Paignton TOWN CENTRE	0.00%	8.30%	46.01%	5.00%	1.25%	0.00%	1.17%	0.00%	6.08%	40.92%	1.16%	0.00%	0.00%	0.00%	0.00%	7.85%	44.99%	4.23%	1.00%	0.00%	0.93%	
Preston	0.00%	0.00%	2.71%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	5.19%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.21%	0.00%	0.00%	0.00%	0.00%	
Other - Paignton	4.17%	5.52%	3.85%	1.05%	0.00%	0.00%	0.00%	2.54%	1.14%	1.21%	0.00%	1.29%	0.00%	0.00%	3.85%	4.65%	3.32%	0.84%	0.26%	0.00%	0.00%	
BRIXHAM																						
Brixham TOWN CENTRE	0.82%	67.06%	2.39%	0.45%	0.00%	0.00%	0.00%	0.00%	69.63%	0.00%	1.75%	0.00%	0.00%	0.65%	67.58%	1.91%	0.71%	0.00%	0.00%	0.00%	0.00%	
Other - Brixham	0.00%	5.52%	0.49%	0.89%	0.00%	0.00%	0.00%	0.00%	4.05%	0.00%	0.00%	0.00%	0.00%	0.00%	5.23%	0.39%	0.71%	0.00%	0.00%	0.00%	0.00%	
OTHER																						
	95.01%	10.50%	10.75%	16.38%	77.39%	97.15%	92.60%	95.03%	10.62%	20.26%	20.58%	90.86%	97.26%	98.04%	95.01%	10.53%	12.65%	17.22%	80.08%	97.17%	93.69%	

Notes:
 Market shares taken from 2022 household survey. Total overall market calculated using a weighting system between café/restaurant spend and pub/bar spend.

TABLE 11b: FOOD AND BEVERAGE STUDY AREA DERIVED TURNOVER, 2022

	2	3	4	TOTAL				TOTAL
				5	6	7	8	(£m)
TORQUAY								
Torquay TOWN CENTRE	£0.2	£0.8	£12.2	£39.3	£9.0	£0.0	£0.8	£62.3
St Marychurch Local Centre, Torquay	£0.0	£0.0	£0.7	£2.7	£1.0	£0.0	£0.0	£4.3
The Willows	£0.0	£0.0	£0.9	£1.4	£0.0	£0.0	£0.6	£2.9
Other - Torquay	£0.0	£0.0	£2.0	£5.9	£1.0	£0.8	£0.3	£9.9
PAIGNTON								
Paignton TOWN CENTRE	£0.0	£1.5	£21.2	£2.7	£0.6	£0.0	£0.3	£26.3
Preston	£0.0	£0.0	£1.5	£0.0	£0.0	£0.0	£0.0	£1.5
Other - Paignton	£1.5	£0.9	£1.6	£0.5	£0.2	£0.0	£0.0	£4.7
BRIXHAM								
Brixham TOWN CENTRE	£0.3	£13.0	£0.9	£0.5	£0.0	£0.0	£0.0	£14.6
Other - Brixham	£0.0	£1.0	£0.2	£0.5	£0.0	£0.0	£0.0	£1.6
OTHER	£37.3	£2.0	£6.0	£11.1	£46.7	£26.0	£30.4	£159.5

Notes:

Study area derived turnover calculated by applying market shares in Table 11a to available F&B expenditure, by zone.

TABLE 11c: FOOD AND BEVERAGE EXPENDITURE / FLOORSPACE CAPACITY

	2022	2027	2032	2040
AVAILABLE F&B EXPENDITURE	£287.6	£345.7	£412.9	£497.4
STUDY AREA TURNOVER				
Torquay	£79.4	£95.5	£114.0	£137.4
Paignton	£32.5	£39.0	£46.6	£56.1
Brixham	£16.2	£19.5	£23.3	£28.0
MARKET SHARE				
Torquay	27.6%	27.6%	27.6%	27.6%
Paignton	11.3%	11.3%	11.3%	11.3%
Brixham	5.6%	5.6%	5.6%	5.6%
EXPENDITURE INFLOW				
Torquay	£39.7	£47.7	£57.0	£68.7
Paignton	£9.7	£11.7	£14.0	£16.8
Brixham	£4.9	£5.8	£7.0	£8.4
TOTAL TURNOVER				
Torquay	£119.1	£143.2	£171.1	£206.1
Paignton	£42.2	£50.7	£60.6	£73.0
Brixham	£21.1	£25.3	£30.3	£36.5
BASELINE TURNOVER				
Torquay	£119.1	£138.1	£160.1	£196.9
Paignton	£42.2	£48.9	£56.7	£69.7
Brixham	£21.1	£24.4	£28.3	£34.8
RESIDUAL EXPENDITURE				
Torquay	£0.0	£5.1	£11.0	£9.2
Paignton	£0.0	£1.8	£3.9	£3.2
Brixham	£0.0	£0.9	£1.9	£1.6
INDICATIVE FLOORSPACE CAPACITY (sq m)				
Torquay	0	1,463	3,129	2,615
Paignton	0	518	1,108	926
Brixham	0	259	553	463

Notes:

2022 study area derived turnover levels taken from Table 11b.

Allowance made for expenditure inflow due to the nature of the town centre offer in Torbay.

Allowance made for growth in baseline turnover of existing facilities in order to allow them to benefit from any growth in available expenditure.

Indicative floorspace capacity calculated on the basis of an indicative sales density of £3,500/sq m.

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