SOUTH HAMS DISTRICT COUNCIL'S IVYBRIDGE TOWN CENTRE REGENERATION PROJECT

Report to Ivybridge Town Council – 11th January 2021

INTRODUCTION

1. Progress continues to be made with South Hams District Council's regeneration project at Leonards Road car park in Ivybridge, involving the development of an Aldi supermarket and reordering of the car park and public spaces in order to boost footfall in the town.
2. In June 2020 South Hams Executive agreed to recommend that £65,000 be spent on commissioning advice regarding the project and in September 2020 the full South Hams District Council meeting accepted that recommendation and resolved to continue to support the project as it moves forward to planning and tender stage. That sum has already enabled some work to be done and will also fund further work to be carried out. Decisions on progressing the project further will be made at subsequent meetings.
3. Ivybridge Town Council last considered the project formally at their meeting on 6th July 2020, noting that the scheme would bring clear advantages to the town and contribute towards regeneration of the town centre, but also remarking that investigations must consider more than just the business case for the project in order that Ivybridge's wider prosperity and well being are enhanced and not damaged by the development.
4. The Council agreed to support the principle of the supermarket development, but only subject to satisfactory outcomes and conclusions in relation to various matters. It was also resolved that:
   a) the plans be reviewed in the light of the Covid-19 pandemic and changes to society, and
   b) SHDC be asked to establish a working group, including key stakeholders and Ivybridge Town Council representatives, in order to progress the scheme collaboratively.
5. A further informal meeting with SHDC took place on 19th October 2020, when progress on various matters was reported to the Town Council.
6. This report aims to summarise further progress made, particularly against the concerns raised by the Town Council, and respond to the latest developments in the project.

THE PLANNING CONTEXT

7. The planning context is established by the Plymouth and South West Devon Joint Local Plan and the Ivybridge Neighbourhood Plan.
8. Of particular relevance are Neighbourhood Plan policies INP1 (town centre regeneration) and INP2 (town centre land east of the river Erme). INP1 requires that developments promote the vitality, viability and retail health of the town centre and identifies a number of priorities, including creation of a town square. INP2 proposes a health and leisure hub, a hotel and restaurant, and retail and office development. The Town Council has already accepted that proposals for a hotel and restaurant and improvements to the health and leisure hub are not included as part of the scheme. Refurbishment of the leisure centre and pool has recently been carried out, a proposed restaurant initially included in the project

received little public support in the initial consultations on the project, and the prospects of a hotel in the project area are remote.

9. Policy INP2 also requires:
    a) a safe, attractive environment with enhanced public open space,
    b) a better relationship and improved access to the river including new or improved bridges,
    c) improved flood resistance and resilience,
    d) high quality design with safe convenient access for all,
    e) no loss of car parking plus suitable parking and servicing for the development,
    f) a masterplan for the wider area east of the river, and
    g) contribution towards town centre regeneration priorities including a town square.
10. The project helps to deliver some of the neighbourhood plan's policy objectives for the area, but some matters are not addressed. The report highlights these below.

PROGRESS WITH THE PROJECT

11. SHDC has commissioned an economic assessment of the town centre, an independent planning assessment of the site, a flood risk assessment, traffic and highways assessments, ground investigations and ecological surveys. The economic assessment is complete and progress has been made regarding the car parking regime.

Economic Assessment

12. The economic assessment has been prepared by CACI and takes the form of a detailed market summary for Ivybridge. Its summary conclusions are that:
    a) Households across Ivybridge's catchment spend more on convenience goods than the regional average but the town centre is not fully capitalising on this high spend, something that Aldi would enable it to do better.
    b) An Aldi in Ivybridge would keep 16% more spend within the town centre and reduce the leakage of convenience goods spend to other nearby supermarkets, particularly the out-of-town Tesco Extra.
    c) Ivybridge has an affluent to middle-income catchment with three quarters classed as family groups. This strongly aligns with the Aldi offer, indicating that the Aldi brand would be favoured by local users and reduce their convenience goods spend elsewhere.
    d) Placing an Aldi in Ivybridge would encourage more visits to the town from catchment residents, which in turn would drive more cross shopping with the town centre's existing offer and independents.
    e) There would be minimal cannibalisation with the current town centre offer; affluent households would continue to use butchers and bakers in the town as they index above the UK average for choosing quality over price. They would then use Aldi for their everyday supplies.
    f) Aldi would become the anchor for Ivybridge town centre, attracting new brands and improving the high street offer. This in turn would enable Ivybridge to compete with comparison goods focussed competitors across the catchment.

g) Introducing Aldi, which has a limited online presence, would future proof the town and make it less susceptible to the threat of online shopping.

13. The report to South Hams Executive Committee on 17th September 2020 drew similar summary conclusions, as follows:

    a) There is capacity for Ivybridge to offer a greater proportion of value brands, including premium brands to appeal to affluent households currently shopping elsewhere. Aldi would satisfy this unmet potential.

    b) Placing an Aldi in Ivybridge would grow its catchment, encourage a greater proportion of shoppers to visit the town and encourage cross shopping with the existing offer and independents.

    c) 92% of all households in the catchment, index above the UK average on visiting Aldi at least once a month, indicating brand affinity in the area will be very strong.

    d) Affluent households across the catchment would continue to use butchers and bakers in the town as they index above the UK average for choosing quality over price. They would then use Aldi for their everyday supplies.

    e) Ivybridge sits in the top half of all retail centres in the South West and has risen up the ranking over recent years. It is important to introduce new brands to the town to ensure that it does not drop in future rankings.

14. Some of the conclusions reported to the South Hams Executive appear to make assumptions beyond the CACI findings. However, the overall conclusions in each case are broadly in favour of establishing an Aldi store in Ivybridge, particularly in order to:

    a) retain more of the area's above-average spend on convenience goods;
    b) encourage more shopping visits to Ivybridge town centre as a whole; and
    c) attract new brands to the town centre and improve the existing offer.

Car Parking

15. It had been proposed that ANPR (automatic number plate recognition) technology should be used for the car park. Legal advice, however, has indicated that this option is not open to the project and in any case neither Aldi nor DCC Highways favour a barriered car park.

16. The following parking regime is therefore now proposed:

    a) **Upper Tier Car Park** – 100 dedicated spaces let to Aldi to be used as 90 minute free car parking within their lease. The remaining 20 or so spaces to be segregated and administered by SHDC as reserved parking permit bays

    b) **Lower Tier Car Park** – SHDC long stay car park with about 125 spaces and a range of tariff options (short stay, long stay and permit holders). It is also proposed to mirror this regime in all SHDC car parks in Ivybridge.

17. The electric vehicle charging points already installed at the Leonards Road car park (but still awaiting grid connection) will be unaffected by the proposals.

Other detailed investigations

18. Other detailed investigations are ongoing, and include planning assessment, flood risk assessment, traffic and highways assessments, ground investigations and ecological survey.

19. Consultation with owners, occupiers and other stakeholders is continuing. Ivybridge Town Council and PL21 are identified as key stakeholders.
20. SHDC has also appointed external solicitors to advise on the lease arrangements with Aldi. The report to their Executive Committee on 17th September 2020 sets out more detail.
21. Revisions to the proposed scheme will be made as ongoing investigations and consultations proceed. Draft (pre-planning) layouts and sections have been prepared and made available by SHDC. These are subject to further revision.
22. When all investigations and preparations have been satisfactorily carried out a planning application will be submitted. It is anticipated that a further report to South Hams Executive will be made before this step is taken.

RESPONSE TO THE TOWN COUNCIL'S CONCERNS

23. In July 2020 the Town Council raised a variety of concerns to be resolved before its support for the principle of a supermarket development could be confirmed. Its principal concerns are reiterated below, with a summary of progress made in each case:
    a) **raise the quality of design and landscaping:** without more detailed elevations it is impossible to judge what improvements may have been made, but sketch designs and layout show the loss of a number of mature trees with new planting being predominantly low level.
    b) **improve public open space and access to the river:** sketch layouts appear to show no improvements to public open space. A shared footpath/cyclepath is shown alongside the river but there are no other river access provisions shown.
    c) **improve or replace footbridges:** the project does not address this and SHDC has identified the need for repair and improvement of the footbridges as a matter for further consultation.
    d) **create a town square:** the project includes no provision for or any apparent contribution towards a town square. The opportunity remains to consider a footbridge improvement in combination with the creation of a square.
    e) **improve and increase car parking provision:** details of the car parking proposed are shown in some detail and include a small increase in the number of car parking spaces. This is achieved through the introduction of a decked car park at the site.
    f) **enhance pedestrian and cycle provision:** a shared footpath/cyclepath is proposed alongside the river, and the proposed footpath running between the Town Hall and the proposed supermarket building has been widened to 3.2m.
    g) **enhance disabled access provision:** the design has been enhanced to include additional sloped access ramps and there are some disabled parking spaces.
    h) **ensure appropriate relocation of additional facilities such as the skatepark:** SHDC recognise a desire to make new wheeled sports provision in Ivybridge, within or near to the town centre and have identifies this as a matter for further consultation.
    i) SHDC has also identified the buildings which lie adjacent to the proposed development site, such as the youth club building, as another matter for further consultation.

24. Other matters which the Town Council highlighted as important and requiring resolution included:

    a) securing a supermarket design of high quality well related to its surroundings,
    b) the creation of safe, welcoming public spaces and attractive landscaping of the site,
    c) coordinated traffic and parking management within the site and across the town,
    d) an overall strategy for movement, good pedestrian and cycle connectivity, and secure cycle parking, and
    e) full consideration of Ivybridge's Climate Emergency Declaration.

SUMMARY

25. The current focus of the project appears to be on operational efficiency. A good deal of work remains to be done to secure a satisfactory design, layout and relationship with the river. There are no elevations of the proposed supermarket and few design details.
26. The scheme involves the loss of a number of mature trees including the whole of the hedgebank within the existing car park. New planting and landscaping is predominantly shown to be low level planting with some semi-mature tree planting at the southern boundary of the site. These measures are unlikely to create a particularly attractive setting for the development.
27. Off-site mitigation to compensate for loss of trees is being considered, but there is alsos scope to provide for more planting on site, particularly of semi-mature trees. Planting in groups would achieve more biodiversity and amenity value than individual trees.
28. A "Zone for enhanced views into Town Centre/Glanvilles Mill" is shown, but with no explanation as to how these views are to be enhanced. There is no indication of any additional public open space and it is not clear how improved public access to or a better relationship with the river will be achieved.
29. The scheme does not provide for any improvements to the bridges or any contribution towards the creation of a town square. However, it is understood that SHDC are pressing ahead with repairs and improvements to the bridges.
30. A number of matters, including flooding, traffic and ecology, are still under investigation.
31. It also remains unclear how shopping habits might change in the wake of the coronavirus pandemic. Aldi report an increase in trade and local shopping has increased during the lockdown. A local Aldi store may therefore experience greater turnover in future than before the pandemic, but shopping habits could also revert to pre-pandemic patterns.
32. Not all of these matters may be able to be resolved and significant shortfalls may signal that too much is being sought from the site. However, the failure of the project would mean the loss of the opportunity to kick-start regeneration of the town centre. A final decision should only be made in the light of fuller information.
33. In summary, the principle of a supermarket development on the site can still be supported subject to satisfactory outcomes in relation to the various matters described above. It ought to be possible, through good design and layout, to bring forward a proposal to meet the essential elements of the development plan and provide a suitable building for Aldi to operate successfully.

CONCLUSION

34. Ivybridge Town Council is **RECOMMENDED** to:

a) submit this report as its further response to South Hams District Council's Ivybridge Regeneration Project,

b) affirm its support for the principle of a supermarket development in order to promote regeneration of the town centre, but subject to satisfactory outcomes and conclusions in relation to the various matters listed in this report,

c) accept the proposed car parking regime, providing it is part of a coordinated traffic and parking strategy for the town as a whole and noting that details of car park design and construction may yet need to be refined in order to achieve the required environmental and design quality,

d) highlight the particular need to create an improved public realm, a safe and attractive riverside and improved access and public space provision for all, and that there remains a need to:

   i. raise the quality of design and landscaping,

   ii. improve public open space and access to the river, and

   iii. enhance pedestrian and cycle provision.

   The scheme currently falls short in these respects and the Town Council reserves its position on these matters pending receipt of more details, and

e) require that the proposed development should also enable as priorities:

   i. improvement or replacement of the footbridges across the river,

   ii. reprovision of a wheeled sports facility, in or close to the town centre, catering for all ages and particularly the younger age groups, and

   iii. the creation of or a contribution towards a town square.

APPEND LAYOUTS AND SECTIONS

Ivybridge Regeneration Project Update

October 2020

Background

June 2020 Executive

Further to the outcome of the public consultation (69% in favour of the development), the Executive recommended a further £65,000 be spent commissioning further work to provide advice in order to move the project forward

September 2020 Executive

The Executive recommended to continue to support the project as it moves forward to planning and tender stage and make a decision on progressing the project further at a subsequent meeting of the Executive and Council in December 2020.

Update Meeting Outline

- Economic Assessment
- Site Investigations
- Planning Matters
- Car Park Structure
- Wheeled Sports Provision
- Communication & Engagement Strategy
- Q&A’s

Economic Assessment

IVYBRIDGE MARKET SUMMARY

August 2020

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CACI

South Hams District Council

INTRODUCTION & BRIEF

PROJECT BRIEF & APPROACH

- CACI have been instructed by South Hams District Council to provide a strategic and independent analysis to asses the value of opening an Aldi in Ivybridge and how it will help to future proof the town.
- This report will provide insight into:
  - Ivybridge's current position (inc. expenditure, competition, rankings)
  - Historic rankings and retail provision in the town
  - Benchmarking and tenant audit to understand missing gaps and potential targets
  - Demographic Profile
  - Impact of doing nothing to Ivybridge
  - Benefits that Aldi will bring to Ivybridge

CACI PRODUCTS:

- **Retail Footprint (RF)** is CACI's UK gravity model that predicts the catchments of all UK retail destinations and accounts for the attractiveness of the centre's mix, the location of competing schemes and the level of demand in the area.
- **Acorn** is CACI's consumer segmentation model. Acorn combines geography with a wide range of demographics and lifestyle data sources to group the entire population into 5 Categories, 18 Groups and 62 Types.

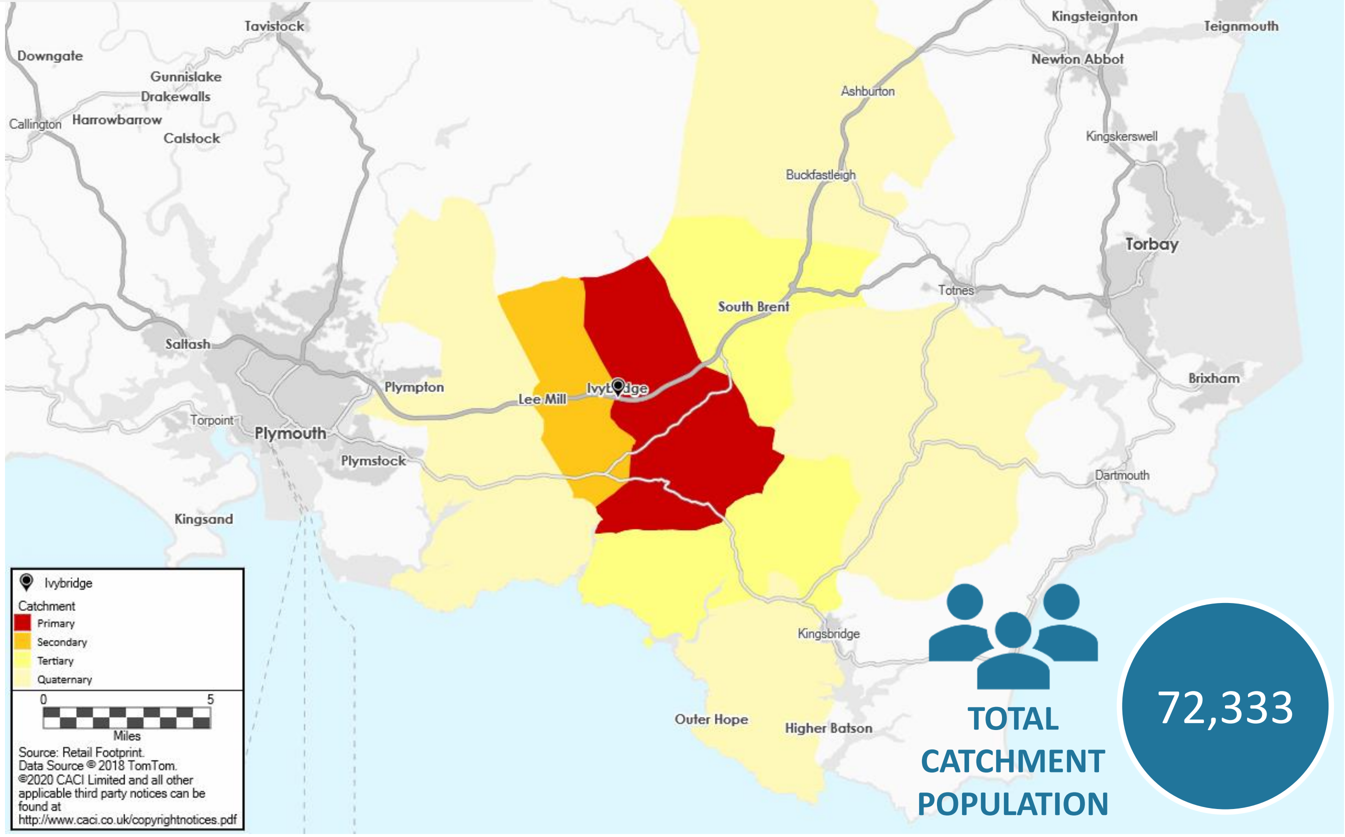
A full methodology can be found in the appendix of this report.

IVYBRIDGE: TODAY

IVYBRIDGE: CATCHMENT

Ivybridge sits inside the top 25% of all Regional Towns in the UK, with a total Retail Goods spend potential of £22 million. Within its Total catchment of 72k people, Ivybridge attains a market share of 5.7%.

The **Core catchment** refers to the **Primary** and **Secondary catchments** where 75% of spend is expected to come from.



TOTAL CATCHMENT POPULATION

72,333

£22.0m

TOTAL RETAIL GOODS SPEND POTENTIAL

TOTAL RETAIL GOODS SPEND (UNWEIGHTED): ***£383.2m***

% MARKET SHARE

5.7% TOTAL CATCHMENT

8.7% REGIONAL TOWNS AVERAGE

UK REGIONAL TOWNS: TOP **24%** RETAIL CENTRE IN UK (174TH OUT OF 731 CENTRES)

ALL CENTRES SOUTH WEST: TOP **42%** RETAIL CENTRE IN UK (OUT 190TH OF 456 CENTRES)

Note: Regional Towns, often called market towns, have small populations and are generally found more than 20 minutes drive time away from primary or major centres and tend to be dominant within their vicinity. A number of these centres do not reflect the affluence in surrounding residential areas with their retail offer, having fallen behind bigger and better centres nearby.

WHY IVYBRIDGE?

- Ivybridge's catchment covers a significant proportion of the South Hams area and beyond, limited to the east by Torbay and west by Plymouth.
- It is a strong centre in its own class, Regional Towns, sitting in the top quarter of all comparable centres. A number of these already have an Aldi present among their retail offering, indicating it could be sustained in Ivybridge.

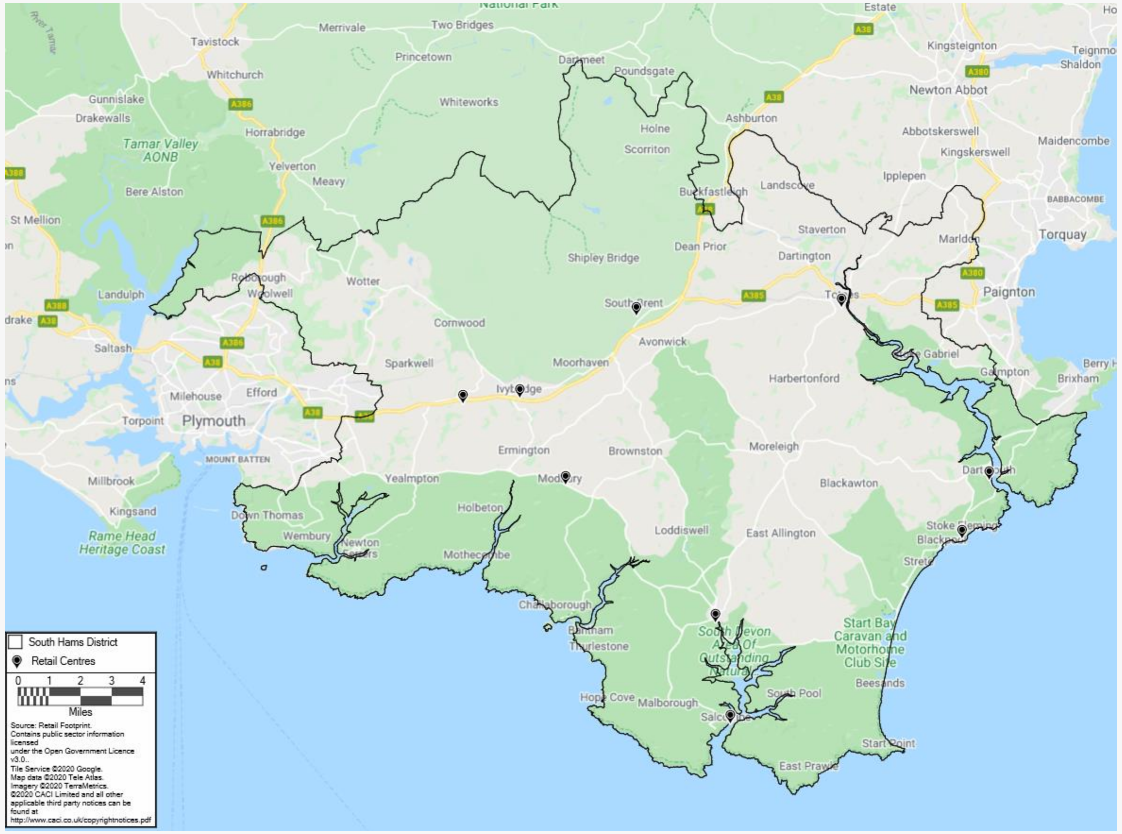
Source: Retail Footprint 2020

Note: rankings are based on weighted catchment Comparison Goods spend potential

IVYBRIDGE: LOCAL RANKING

Of the 9 retail destinations in South Hams, Ivybridge sits 4th, indicating it is a key retail centre in the area and should focus on the everyday need rather than directly competing with tourist towns such as Salcombe. Aldi locating to Ivybridge would make it the first store in the district.

SOUTH HAMS RETAIL OFFERING



SOUTH HAMS RANKING

Tesco Extra is classed as its own centre as it is located out of the town and is therefore a competitor.

Rank	Name	Minor Class	Attractiveness Score	Residential Comparison Goods Market Potential (£m)	Convenience Goods Market Potential (£m)
1	Totnes	Regional Towns	178	£25.8	£26.3
2	Dartmouth	Regional Towns	176	£17.8	£18.8
3	Kingsbridge	Rural Towns	126	£15.8	£16.3
4	**Ivybridge**	**Regional Towns**	**67**	**£9.6**	**£9.2**
5	Salcombe	Rural Towns	121	£5.3	£5.3
6	Tesco-Extra, Ivybridge	Regional Towns	57	£4.2	£4.0
7	Modbury	Rural Towns	15	£0.7	£0.7
8	South Brent	Rural Towns	4	£0.2	£0.2
9	Stoke Fleming	Rural Towns	1	£0.02	£0.0

Note: rankings are based on weighted catchment Comparison Goods spend potential

Source: Google; Retail Footprint 2020

IVYBRIDGE: LOCAL COMPARISON GOODS COMPETITION

Locally, Ivybridge faces fierce competition, with Plymouth dominating the area and attaining a quarter of the market share. Ivybridge achieves 19% of the market share in the Core, indicating that it has a strong hold over local shoppers which will only increase with an Aldi present.

LOCAL COMPETITION

Centre Name	Minor Class Name	Attractiveness Score	Distance (Miles)	Market Share (Core)	Market Share (Total)
Plymouth	City Centres	1,231	9.8	28.7%	28.2%
Plymouth - Marsh Mills Retail Park	Small Retail Parks	276	7.5	19.1%	15.1%
Ivybridge	**Regional Towns**	**67**	**-**	**18.7%**	**5.7%**
Totnes	Regional Towns	178	10.7	0.6%	4.0%
Kingsbridge	Rural Towns	126	9.6	0.2%	2.8%
Newton Abbot	Value Major Town Centres	477	16.8	No Core	2.6%
Ivybridge - Tesco-Extra	Regional Towns	57	1.8	7.2%	2.5%
Plymouth - Plympton	Regional Towns	81	5.8	1.6%	2.1%
Plymouth - Coypool Retail Park	Retail Parks (in Towns)	74	7.1	2.0%	2.1%
Ashburton	Rural Towns	35	11.3	No Core	1.9%
Kingsteignton - Newton Road Retail Park	Medium Retail Parks	190	17.7	No Core	1.3%
Buckfastleigh	Rural Towns	18	8.9	No Core	1.1%
Plymstock - Morrisons	Suburban Centres	60	8.2	0.7%	0.8%
Dartmouth	Regional Towns	176	15.3	No Core	0.8%

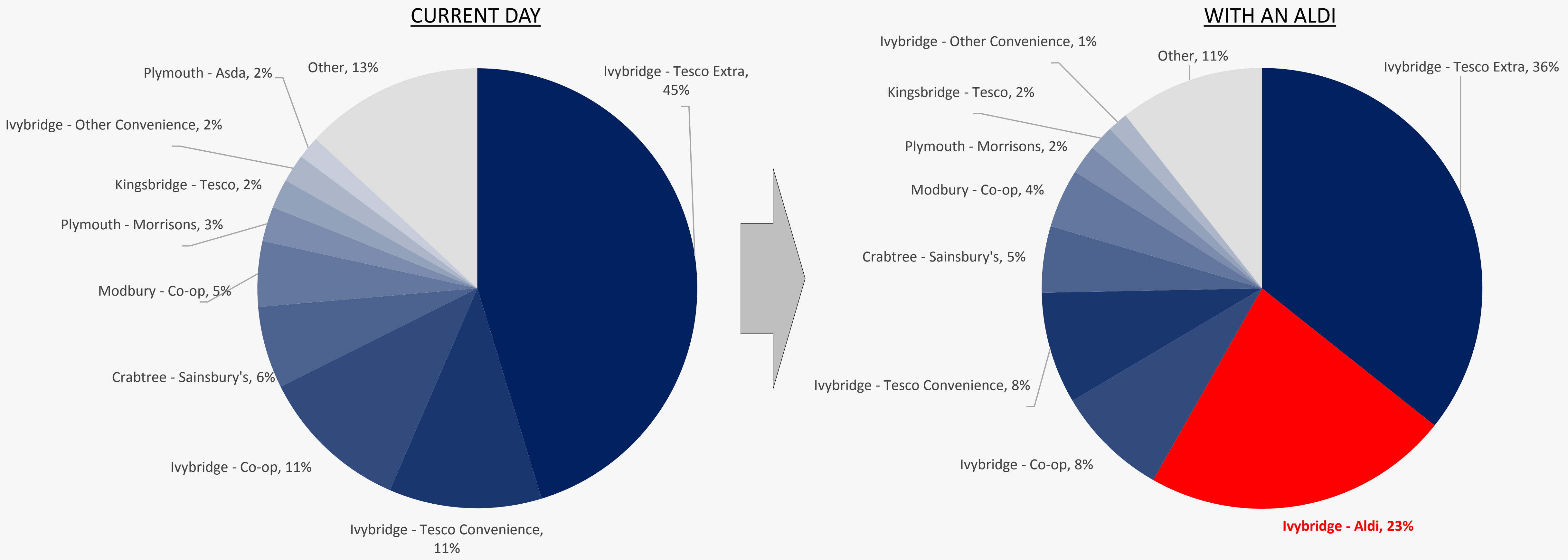
Source: Retail Footprint 2020

IVYBRIDGE: LOCAL GROCERY COMPETITION

Currently three quarters (76%) of convenience spend form the Primary catchment is being spent outside of Ivybridge's town centre, primarily at Tesco Extra. Introducing an Aldi to the town would reduce leakage to 60%, with Aldi achieving 23% of the Primary catchment spend.

PRIMARY CATCHMENT CONVENIENCE COMPETITION

Only the Primary catchment spend leakage has been shown as this is where the majority of spend comes from.



Source: Provision

IVYBRIDGE: EXPENDITURE BY CATEGORY

Reflective of the affluence of Ivybridge residents, household spend sits well above the South West average on all product categories. This is particularly true for Convenience spend, which also sits 4pp above the UK benchmark.

CATEGORY SPEND

		EXPENDITURE PER ANNUM (£M)	ANNUAL HOUSEHOLD SPEND	HHD SPEND VS UK AVG.	HHD SPEND VS SOUTH WEST AVG.
TOTAL SPEND CATEGORIES	Convenience	£9.2	£5,424	+4pp	+5pp
	Comparison Goods	£9.6	£,667	+3pp	+7pp
	Catering	£3.1	£1,843	+2pp	+7pp
TOTAL		£22.0	£12,934	+4pp	+6pp

Source: Retail Footprint 2020

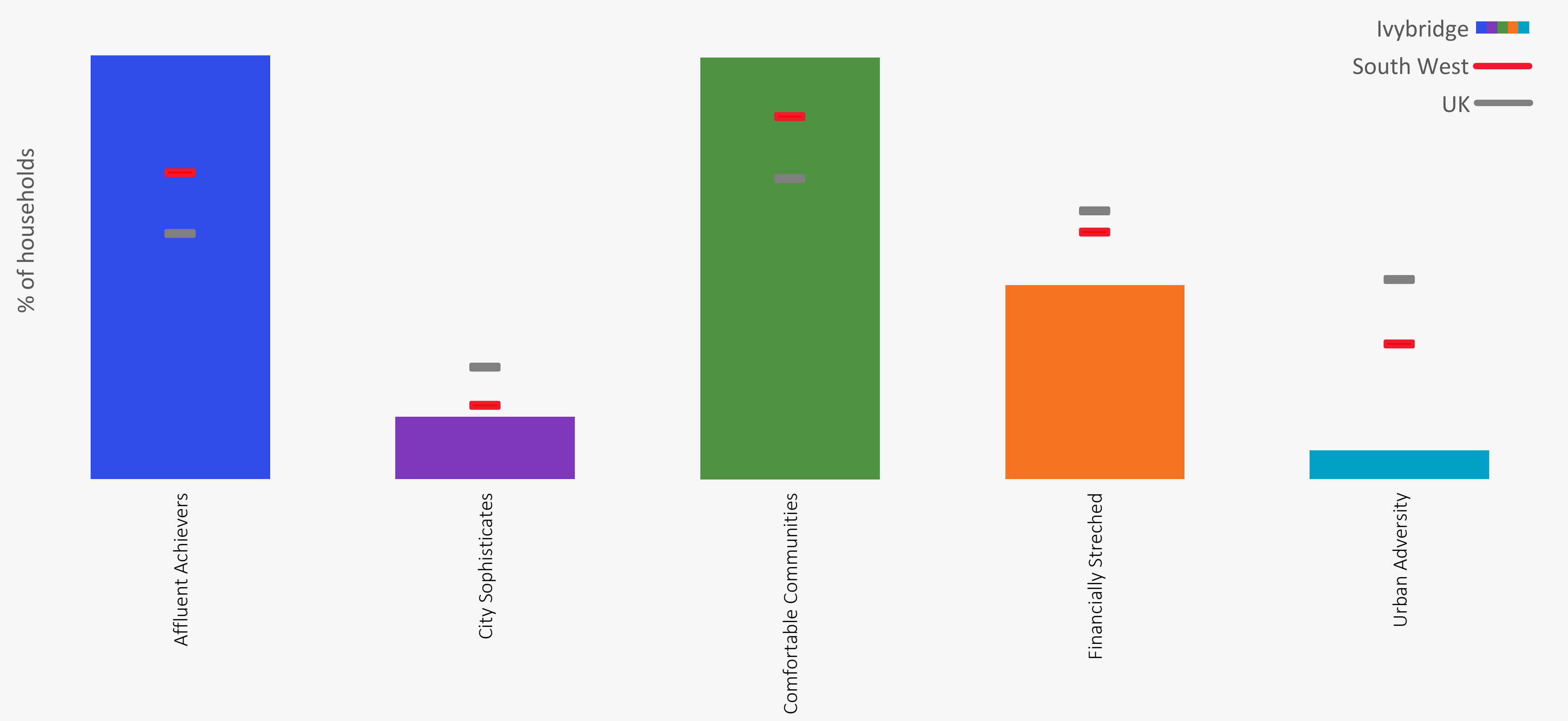
KEY: HHD spend above average; HHD spend below average

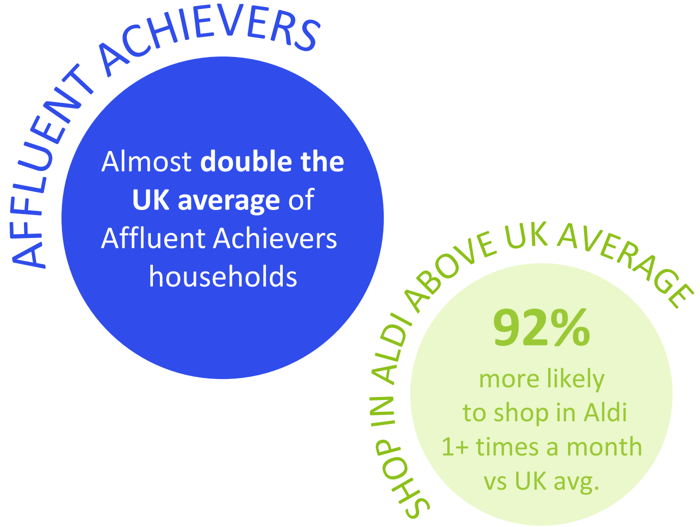
CACI

IVYBRIDGE: CUSTOMER

Ivybridge has an affluent to middle-income catchment with a large number of family groups present which will align with the Aldi offering. Almost all households in the catchment index above the UK average on visiting Aldi at least once a month indicating brand affinity in the area.

Affluent Achievers	Rising Prosperity	Comfortable Communities	Financially Stretched	Urban Adversity
38%	6%	37%	17%	3%





WHY IVYBRIDGE?

- Compared to the South West and UK, Ivybridge has a higher volume of Affluent Achievers and Comfortable Communities households in the catchment. These are core family groups who are likely to engage with an Aldi as well as cross-shop with independents already in Ivybridge.

Source: Retail Footprint 2020; Acorn Knowledge

IVYBRIDGE: FUTURE

WHAT HAPPENS IF WE DO NOTHING?

While across the South West there is likely to be organic growth in offline spend, the huge growth in online convenience spend highlights the need to introduce a brand with a limited online presence, reducing leakage to online. Opening an Aldi in Ivybridge will future proof the town and make it less susceptible to the threat of online as the stores convenience goods offering is offline only.

UNWEIGHTED CONVENIENCE SPEND PROJECTIONS: SOUTH WEST (£M/ANNUM)

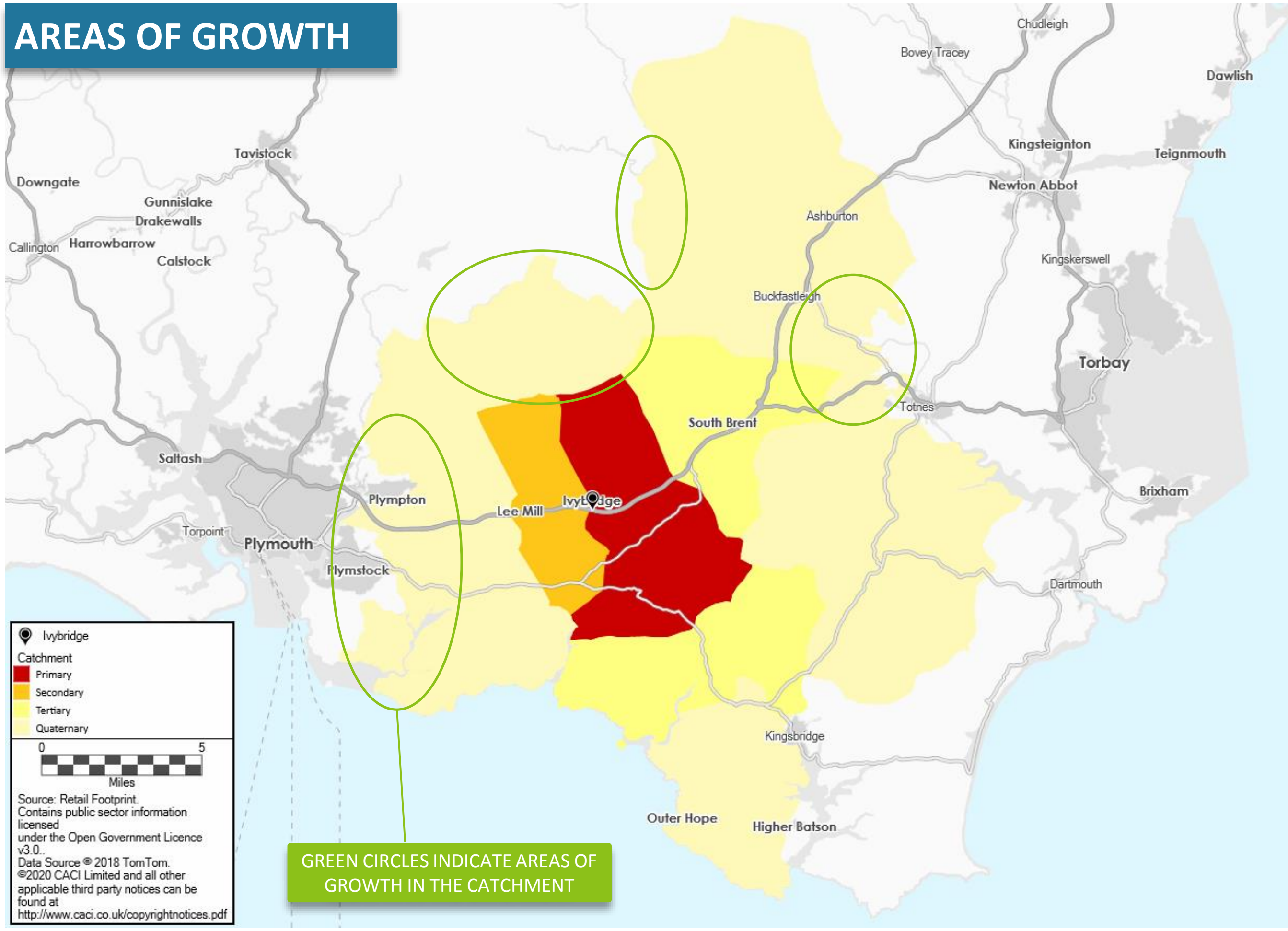
	Current Day		2025		2030
Residential (Offline) Convenience Spend	£12,376m	+12%	£13,886m	+7%	£14,850m
Online Convenience Spend	£1,233m	+111%	£2,600m	+51%	£3,916m

Source: CACI Spend Projections
Note: Current Day is 2019 figures to exclude the impact of Covid-19 on spend

BENEFITS OF AN ALDI IN IVYBRIDGE

Opening an Aldi in the town would grow Ivybridge's catchment; while trips from this area will be drawn in by the Aldi, there is scope to encourage cross shopping with the existing offer. Affluent shoppers are more likely to purchase at independent bakeries and butchers alongside Aldi for essentials.

AREAS OF GROWTH



BENEFITS TO IVYBRIDGE

WILL BE THE FIRST DISCOUNTER IN THE AREA

Currently the nearest Aldi is in Plympton. Introducing a new Aldi to the area will not only make it the **first discounter in the area** but also encourage more local shopping and in turn a more **sustainable shopping experience**.

ALDI WILL BRING IN MORE FREQUENT VISITORS

In CACI's Shopper Dimensions, shoppers to a discount grocery in an In Town Centre or High Street had an **annualised frequency of 76 visits per year**, this is compared to an **average frequency of 58 visits per year**.

ALDI WILL BRING NEW SHOPPERS WHO WILL CROSS-SHOP WITH THE EXISTING OFFER

Aldi is unlikely to cannibalise the current offer at Ivybridge as it **doesn't feature in house bakeries or butchers etc**. Independent brands on the high street and in Glanvilles Mill Shopping Centre will appeal to more affluent and middle income households in the catchment who **prefer to buy locally produced and UK sourced goods**.

ALDI WILL CONTRIBUTE TO EMPLOYMENT IN THE LOCAL CATCHMENT

15% aged 16-74 in Ivybridge's catchment are economically inactive (exc. retired). Aldi needs **between 30-50 staff in its new stores**, employing the majority from **within 2.5 miles of store**.

ALDI CAN BENEFIT FROM THE INCREASING LOCALISM POST COVID-19

Post-lockdown local centres are seeing a greater return in activity compared to city centres. **Ivybridge has seen a greater uplift in shoppers post-lockdown** vs. Plymouth and Exeter; highlighting the opportunity for Aldi to take advantage of this shifting trend.

Source: Retail Footprint 2020, ProVision, Aldi Community Document, Acorn Knowledge; Shopper Dimensions

SUMMARY & CONCLUSIONS

Residents across Ivybridge's catchment have a Convenience Goods household spend which is higher than the regional average. In its current state, the **town centre is not fully capitalising on this high spend**, something that Aldi will enable Ivybridge to do.

An ALDI in Ivybridge would reduce the Convenience Goods spend leakage to other nearby supermarkets. **Opening an ALDI would keep 16% more spend within the town centre**, with the out of town Tesco Extra currently dominating.

Ivybridge has an affluent to middle-income catchment with three quarters classed as family groups; this strongly aligns with the Aldi offering indicating that the **brand will be favoured by local users and prevent them spending their Convenience Goods spend elsewhere**.

Placing an Aldi in Ivybridge would encourage **more frequent visitation from catchment residents to the town,** which in turn would drive more cross shopping with the existing offer and independents.

There will be **minimal cannibalisation with the current town centre offer**; affluent households will continue to use butchers and bakers in the town as they index above the UK average for choosing quality over price. They will then use Aldi for their everyday supplies.

Aldi would become the **anchor for Ivybridge town centre and boost opportunities to attract new brands and improve the high street offer**. This in turn would enable Ivybridge to compete with Comparison Goods focussed competitors across the catchment

Introducing Aldi which has a limited online presence will **future proof the town and make it less susceptible to the threat of online**, as the stores Convenience Goods offering is offline only.

Site Investigations

Planning Matters

- Highways
- Landscaping
- Flood Risk Assessment
- Ecology
- Access – footpaths, cycleways, inclusive design

Car Park Structure

Use of ANPR Technology

Previously, a car park regime utilising ANPR (Automatic number plate recognition) technology allowing “Pay on Exit” for customers with a change to the parking tariff system to provide 90 minutes free for Aldi customers and a maximum stay of 4 hours (short stay only) proposed

External legal advice concluded ANPR can only be used by the Council or its subsidiary as part of an enforcement solution where the additional use of barriers or enforcement officers is utilised.

Proposed Car Parking Regime

An alternative car park regime has been identified as follows:

- Upper Tier Car Park – 100 dedicated spaces let to Aldi to be used as 90 minute free car parking within the demise of any lease. The remaining 20 or so spaces will be segregated from the Aldi spaces to be SHDC administered Reserved Parking.

- Lower Tier Car Park – SHDC long stay car park with plus 100 spaces with a range of tariff options (short & long stay). It is proposed to mirror this regime in all SHDC car parks in Ivybridge.

Wheeled Sports Facility

Communication & Engagement Strategy

Q & A's

IVYBRIDGE MARKET SUMMARY

August 2020

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  - Demographic Profile
  - Impact of doing nothing to Ivybridge
  - Benefits that Aldi will bring to Ivybridge

CACI PRODUCTS:

- **Retail Footprint (RF)** is CACI's UK gravity model that predicts the catchments of all UK retail destinations and accounts for the attractiveness of the centre's mix, the location of competing schemes and the level of demand in the area.
- **Acorn** is CACI's consumer segmentation model. Acorn combines geography with a wide range of demographics and lifestyle data sources to group the entire population into 5 Categories, 18 Groups and 62 Types.

A full methodology can be found in the appendix of this report.

SUMMARY & CONCLUSIONS

Residents across Ivybridge's catchment have a Convenience Goods household spend which is higher than the regional average. In its current state, the **town centre is not fully capitalising on this high spend**, something that Aldi will enable Ivybridge to do.

An ALDI in Ivybridge would reduce the Convenience Goods spend leakage to other nearby supermarkets. **Opening an ALDI would keep 16% more spend within the town centre**, with the out of town Tesco Extra currently dominating.

Ivybridge has an affluent to middle-income catchment with three quarters classed as family groups; this strongly aligns with the Aldi offering indicating that the **brand will be favoured by local users and prevent them spending their Convenience Goods spend elsewhere**.

Placing an Aldi in Ivybridge would encourage **more frequent visitation from catchment residents to the town**, which in turn would drive more cross shopping with the existing offer and independents.

There will be **minimal cannibalisation with the current town centre offer**; affluent households will continue to use butchers and bakers in the town as they index above the UK average for choosing quality over price. They will then use Aldi for their everyday supplies.

Aldi would become the **anchor for Ivybridge town centre and boost opportunities to attract new brands and improve the high street offer**. This in turn would enable Ivybridge to compete with Comparison Goods focussed competitors across the catchment

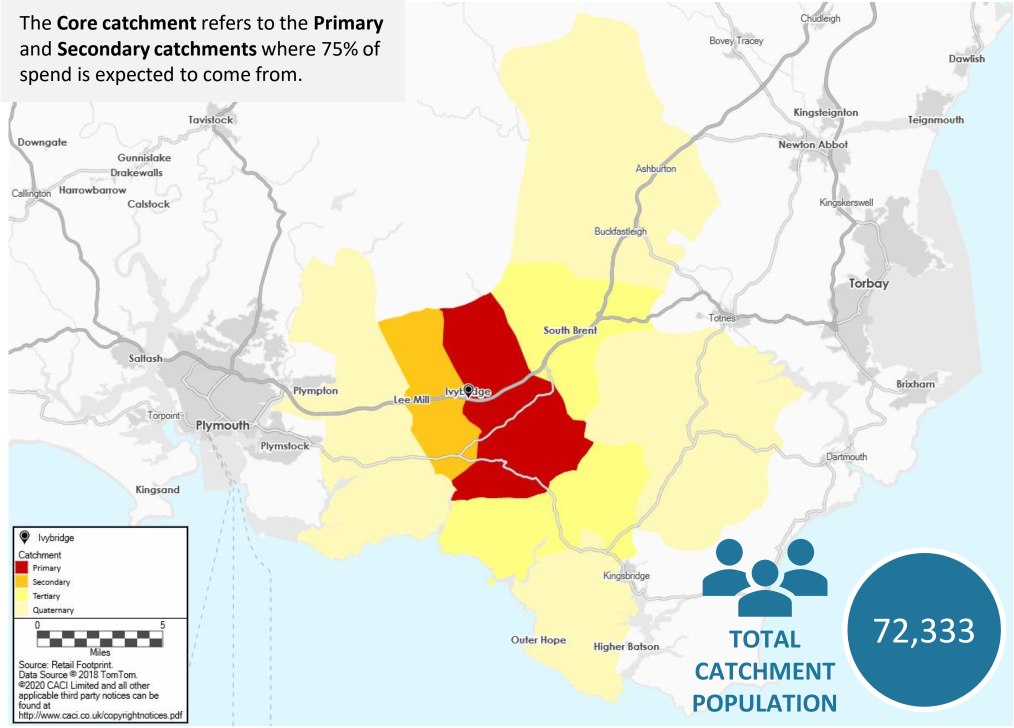
Introducing Aldi which has a limited online presence will **future proof the town and make it less susceptible to the threat of online**, as the stores Convenience Goods offering is offline only.

IVYBRIDGE:
TODAY

IVYBRIDGE: CATCHMENT

Ivybridge sits inside the top 25% of all Regional Towns in the UK, with a total Retail Goods spend potential of £22 million. Within its Total catchment of 72k people, Ivybridge attains a market share of 5.7%.

The **Core catchment** refers to the **Primary** and **Secondary catchments** where 75% of spend is expected to come from.



TOTAL CATCHMENT POPULATION

72,333

£22.0m
TOTAL RETAIL GOODS SPEND POTENTIAL

TOTAL RETAIL GOODS SPEND (UNWEIGHTED): *£383.2m*

% MARKET SHARE

5.7% TOTAL CATCHMENT

8.7% REGIONAL TOWNS AVERAGE

UK REGIONAL TOWNS: TOP **24%** RETAIL CENTRE IN UK (174TH OUT OF 731 CENTRES)

ALL CENTRES SOUTH WEST: TOP **42%** RETAIL CENTRE IN UK (OUT 190TH OF 456 CENTRES)

Note: Regional Towns, often called market towns, have small populations and are generally found more than 20 minutes drive time away from primary or major centres and tend to be dominant within their vicinity. A number of these centres do not reflect the affluence in surrounding residential areas with their retail offer, having fallen behind bigger and better centres nearby.

WHY IVYBRIDGE?

- Ivybridge's catchment covers a significant proportion of the South Hams area and beyond, limited to the east by Torbay and west by Plymouth.
- It is a strong centre in its own class, Regional Towns, sitting in the top quarter of all comparable centres. A number of these already have an Aldi present among their retail offering, indicating it could be sustained in Ivybridge.

Source: Retail Footprint 2020
Note: rankings are based on weighted catchment Comparison Goods spend potential

IVYBRIDGE: UK & REGIONAL RANKING

Regionally, Ivybridge sits alongside Malmesbury and above the likes of Saltash and Verwood, the latter which is in the same class. There is scope for an Aldi at Ivybridge given the brand already operates in the majority of comparable Regional Towns.

UK REGIONAL TOWNS RANKING

KEY: Aldi open in town or opening soon

UK 'Regional Towns' Rank	Centre Name	Residential Comparison Goods Market Potential (£m)
170	Crook	£10.0
171	Malmesbury	£9.8
172	Barton-upon-Humber	£9.7
173	Fleetwood	£9.7
174	**Ivybridge**	**£9.6**
175	Spennymoor	£9.4
176	Uppingham	£9.4
177	Formby	£9.4
178	Verwood	£9.3
179	Bacup	£9.3
180	Cranbrook	£9.2
181	Princes Risborough	£9.1
182	Merthyr Tydfil	£9.1
183	Immingham	£9.0

Note: total number of UK Regional Towns is 731

SOUTH WEST RANKING

Regional Rank	Centre Name	Residential Comparison Goods Market Potential (£m)
185	St Austell - Stadium Retail Park	£10.1
186	Exeter - Honiton Road	£10.1
187	Exeter - Stone Lane Retail Park	£10.1
188	Torquay - St Marychurch	£10.0
189	Malmesbury	£9.8
190	**Ivybridge**	**£9.6**
191	Bristol - Fox Den Road	£9.5
192	Saltash	£9.5
193	Cirencester - Cirencester Retail Park	£9.5
194	Poole - Branksome	£9.3
195	Verwood	£9.3
196	Wincanton	£9.1
197	Amesbury	£9.0
198	Coleford	£8.8

Note: total number of retail destinations in the South West 456

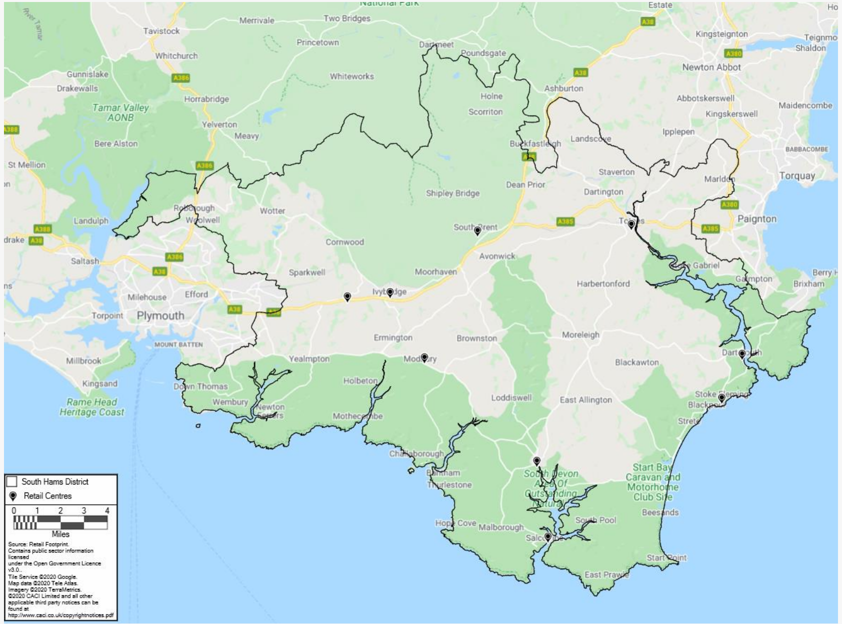
Source: Retail Footprint 2020

Note: rankings are based on weighted catchment Comparison Goods spend potential

IVYBRIDGE: LOCAL RANKING

Of the 9 retail destinations in South Hams, Ivybridge sits 4th, indicating it is a key retail centre in the area and should focus on the everyday need rather than directly competing with tourist towns such as Salcombe. Aldi locating to Ivybridge would make it the first store in the district.

SOUTH HAMS RETAIL OFFERING



SOUTH HAMS RANKING

Tesco Extra is classed as its own centre as it is located out of the town and is therefore a competitor.

Rank	Name	Minor Class	Attractiveness Score	Residential Comparison Goods Market Potential (£m)	Convenience Goods Market Potential (£m)
1	Totnes	Regional Towns	178	£25.8	£26.3
2	Dartmouth	Regional Towns	176	£17.8	£18.8
3	Kingsbridge	Rural Towns	126	£15.8	£16.3
4	**Ivybridge**	**Regional Towns**	**67**	**£9.6**	**£9.2**
5	Salcombe	Rural Towns	121	£5.3	£5.3
6	Tesco-Extra, Ivybridge	Regional Towns	57	£4.2	£4.0
7	Modbury	Rural Towns	15	£0.7	£0.7
8	South Brent	Rural Towns	4	£0.2	£0.2
9	Stoke Fleming	Rural Towns	1	£0.02	£0.0

Note: rankings are based on weighted catchment Comparison Goods spend potential

Source: Google; Retail Footprint 2020

IVYBRIDGE: HISTORIC SOUTH WEST RANKINGS

Ivybridge has grown in size and therefore moved up the South West ranking since 2017. Nearby towns, Dartmouth and Salcombe, have fallen down the ranking indicating scope for Ivybridge to take advantage of available spend which would have previously gone to these areas.

2017 RANKING

SW Rank	Name
4	Plymouth
21	Torquay
23	Newton Abbot
59	Paignton
96	Totnes
114	Dartmouth
129	Brixham
152	Kingsbridge
199	Torbay
200	Plymouth - Plympton
214	Torquay - St Marychurch
218	Plymouth - Mutley Plain
221	Plymouth - Estover
225	**Ivybridge**
231	Salcombe
240	Plymstock
255	Plymouth - St Budeaux
256	Plymouth - Crownhill
266	Ivybridge - Tesco-Extra

2018 RANKING

SW Rank	Name
4	Plymouth
20	Newton Abbot
24	Torquay
58	Paignton
96	Totnes
118	Dartmouth
130	Brixham
149	Kingsbridge
199	Torbay
201	Plymouth - Plympton
202	Plymouth - Estover
209	Torquay - St Marychurch
213	Plymouth - Mutley Plain
229	**Ivybridge**
235	Plymouth - Crownhill
236	Salcombe
245	Plymstock
261	Plymouth - St Budeaux
269	Ivybridge - Tesco-Extra

2019 RANKING

SW Rank	Name
3	Plymouth
23	Newton Abbot
30	Torquay
73	Paignton
87	Totnes
95	Brixham
119	Dartmouth
134	Torbay
136	Kingsbridge
170	Plymouth - Estover
197	Torquay - St Marychurch
199	**Ivybridge**
224	Plymouth - Mutley Plain
232	Plymouth - Crownhill
236	Plymouth - Plympton
240	Salcombe
241	Plymstock
245	Plymouth - St Budeaux
266	Ivybridge - Tesco-Extra

2020 RANKING

SW Rank	Name
3	Plymouth
25	Newton Abbot
32	Torquay
78	Paignton
88	Totnes
98	Brixham
126	Dartmouth
122	Torbay
140	Kingsbridge
204	Plymouth - Estover
188	Torquay - St Marychurch
190	**Ivybridge**
201	Plymouth - Mutley
233	Plymouth - Crownhill
247	Plymouth - Plympton
245	Salcombe
246	Plymstock
239	Plymouth - St Budeaux
254	Ivybridge - Tesco-Extra

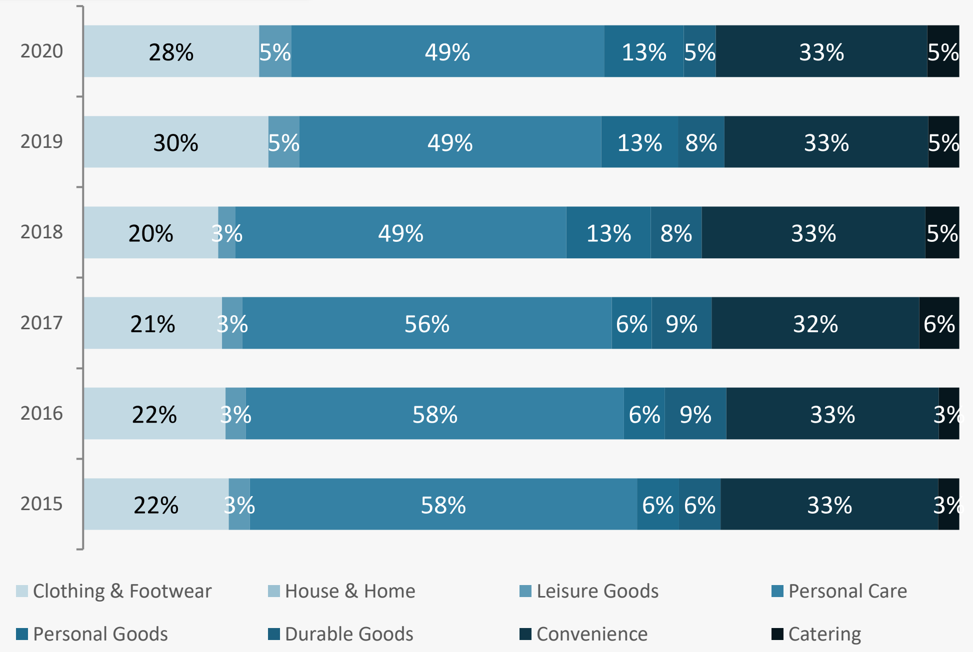
Source: Retail Footprint 2017/18/19/20

Note: Ranking is based on Comparison Goods market potential; Methodology changes will have influenced historic rankings.

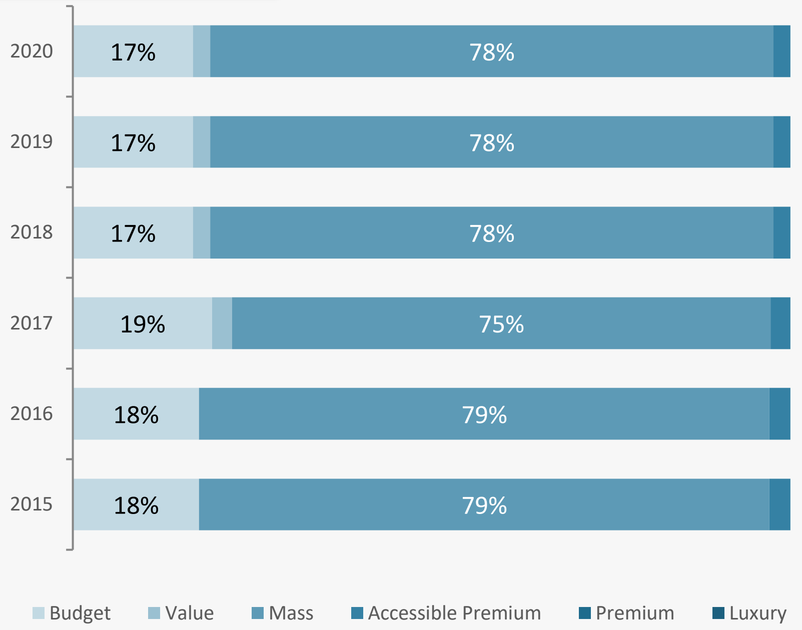
IVYBRIDGE: HISTORIC RETAIL OFFERING

Ivybridge's retail make up has changed in the last five years, with a higher proportion of Clothing and Footwear at the expense of Leisure Goods. In terms of market position, Ivybridge has historically always been mass focussed; introducing an Aldi would grow the volume of Value brands.

RETAIL MIX



MARKET POSITION



Source: LDC 2015/16/17/18/19/20

Note: See appendix p28 for products within each product category

IVYBRIDGE: LOCAL COMPARISON GOODS COMPETITION

Locally, Ivybridge faces fierce competition, with Plymouth dominating the area and attaining a quarter of the market share. Ivybridge achieves 19% of the market share in the Core, indicating that it has a strong hold over local shoppers which will only increase with an Aldi present.

LOCAL COMPETITION

Centre Name	Minor Class Name	Attractiveness Score	Distance (Miles)	Market Share (Core)	Market Share (Total)
Plymouth	City Centres	1,231	9.8	28.7%	28.2%
Plymouth - Marsh Mills Retail Park	Small Retail Parks	276	7.5	19.1%	15.1%
Ivybridge	**Regional Towns**	**67**	**-**	**18.7%**	**5.7%**
Totnes	Regional Towns	178	10.7	0.6%	4.0%
Kingsbridge	Rural Towns	126	9.6	0.2%	2.8%
Newton Abbot	Value Major Town Centres	477	16.8	No Core	2.6%
Ivybridge - Tesco-Extra	Regional Towns	57	1.8	7.2%	2.5%
Plymouth - Plympton	Regional Towns	81	5.8	1.6%	2.1%
Plymouth - Coypool Retail Park	Retail Parks (in Towns)	74	7.1	2.0%	2.1%
Ashburton	Rural Towns	35	11.3	No Core	1.9%
Kingsteignton - Newton Road Retail Park	Medium Retail Parks	190	17.7	No Core	1.3%
Buckfastleigh	Rural Towns	18	8.9	No Core	1.1%
Plymstock - Morrisons	Suburban Centres	60	8.2	0.7%	0.8%
Dartmouth	Regional Towns	176	15.3	No Core	0.8%

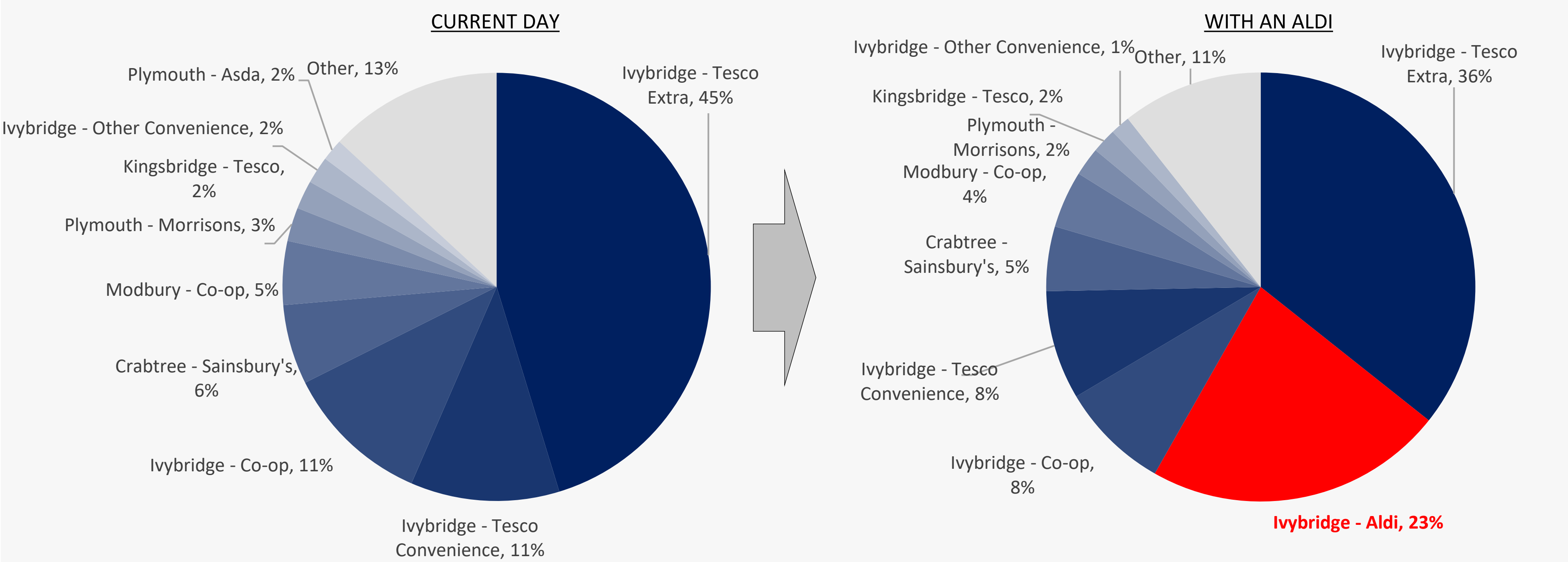
Source: Retail Footprint 2020

IVYBRIDGE: LOCAL GROCERY COMPETITION

Currently three quarters (76%) of convenience spend form the Primary catchment is being spent outside of Ivybridge's town centre, primarily at Tesco Extra. Introducing an Aldi to the town would reduce leakage to 60%, with Aldi achieving 23% of the Primary catchment spend.

PRIMARY CATCHMENT CONVENIENCE COMPETITION

Only the Primary catchment spend leakage has been shown as this is where the majority of spend comes from.



Source: Provision

IVYBRIDGE: EXPENDITURE BY CATEGORY

Reflective of the affluence of Ivybridge residents, household spend sits well above the South West average on all product categories. This is particularly true for Convenience spend, which also sits 4pp above the UK benchmark.

CATEGORY SPEND

TOTAL SPEND CATEGORIES	EXPENDITURE PER ANNUM (£M)	ANNUAL HOUSEHOLD SPEND	HHD SPEND VS UK AVG.	HHD SPEND VS SOUTH WEST AVG.
Convenience	£9.2	£5,424	+4pp	+5pp
Comparison Goods	£9.6	£,667	+3pp	+7pp
Catering	£3.1	£1,843	+2pp	+7pp
TOTAL	£22.0	£12,934	+4pp	+6pp

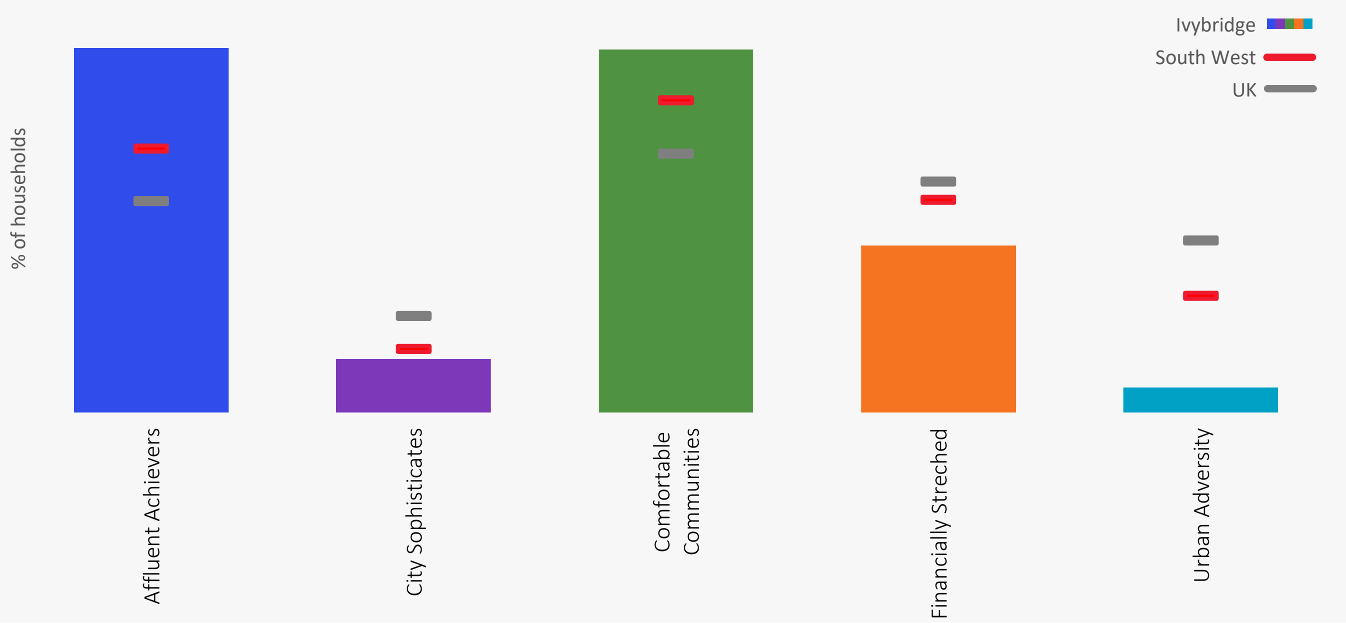
Source: Retail Footprint 2020

KEY:
- HHD spend above average
- HHD spend below average

IVYBRIDGE: CUSTOMER

Ivybridge has an affluent to middle-income catchment with a large number of family groups present which will align with the Aldi offering. Almost all households in the catchment index above the UK average on visiting Aldi at least once a month indicating brand affinity in the area.

Affluent Achievers	Rising Prosperity	Comfortable Communities	Financially Stretched	Urban Adversity
38%	6%	37%	17%	3%



AFFLUENT ACHIEVERS

Almost **double the UK average** of Affluent Achievers households

SHOP IN ALDI ABOVE UK AVERAGE

92% more likely to shop in Aldi 1+ times a month vs UK avg.

WHY IVYBRIDGE?

- Compared to the South West and UK, Ivybridge has a higher volume of Affluent Achievers and Comfortable Communities households in the catchment. These are core family groups who are likely to engage with an Aldi as well as cross-shop with independents already in Ivybridge.

Source: Retail Footprint 2020; Acorn Knowledge

BENCHMARKING

BENCHMARKING

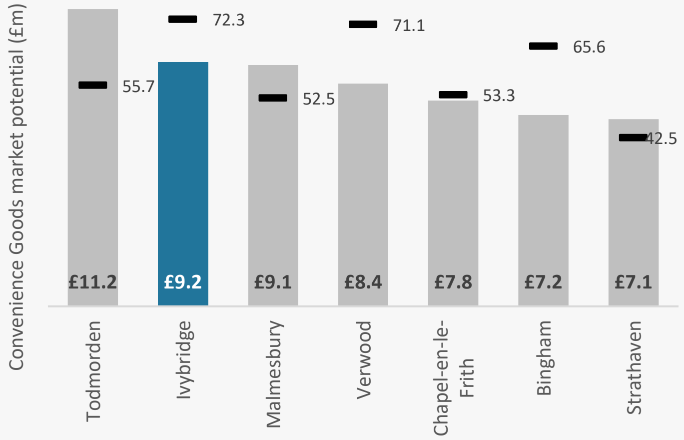
A number of different benchmark groups have been used to understand the areas of opportunity for Ivybridge in the future. This includes centres nationally which are similar to Ivybridge but already have an Aldi present, local benchmarks and city centre competitors.

BENCHMARK CENTRES

Convenience Goods market potential (£m)
Total Population ('000s)

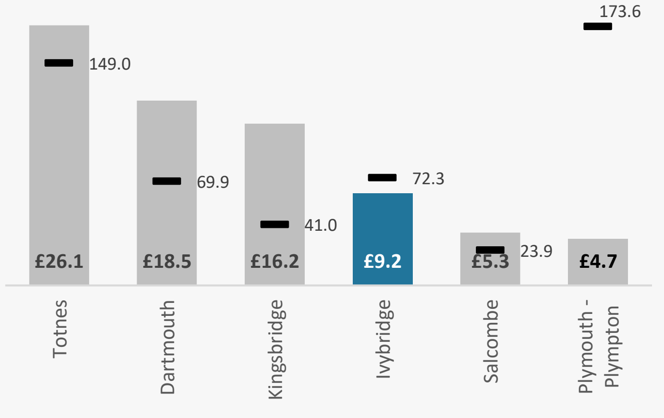
NATIONAL BENCHMARK CENTRES WITH AN ALDI

These centres have been used as national benchmarks as they sit in the **same 'Regional Towns' class as Ivybridge** but **all have, or are due to have, an Aldi in the town**. **Ivybridge outperforms** all but Verwood in terms of **Convenience Goods spend potential and population showing capacity for an Aldi in the town.**.



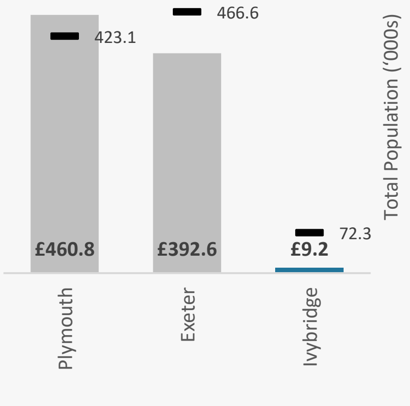
LOCAL BENCHMARKS

Compared to local competitors, **Ivybridge sits above Salcombe and Plympton based on Convenience spend potential, almost double the smallest centre**. A new Aldi is due to open in Plympton shortly, **indicating that there should also be capacity for the brand to succeed in Ivybridge**.



CITY CENTRE COMPETITORS

Local city centre schemes have also been shown in the benchmarking section to **understand why spend is being lost to these areas and how Ivybridge can better compete**.

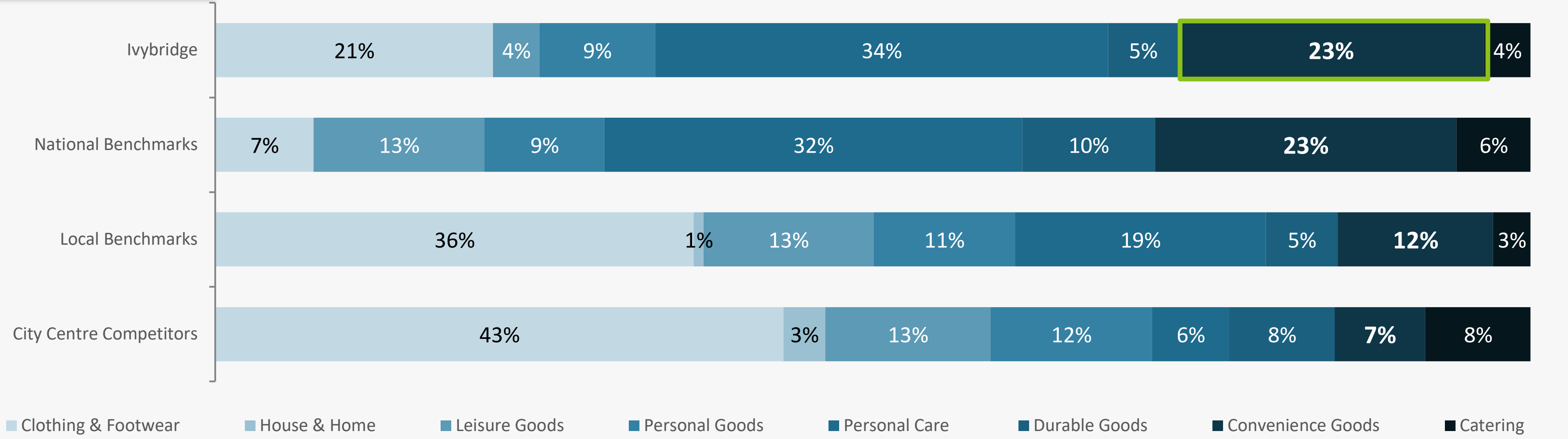


Source: Retail Footprint 2020

BENCHMARKING: RETAIL MIX

Ivybridge is dominated by Personal Care brands to a much greater proportion than the local and city centre competitors. The town's retail mix is far more similar to the national benchmark centres where Aldi's already operate indicating it would fit in well with the existing offer.

BENCHMARK CENTRES



WHY IVYBRIDGE?

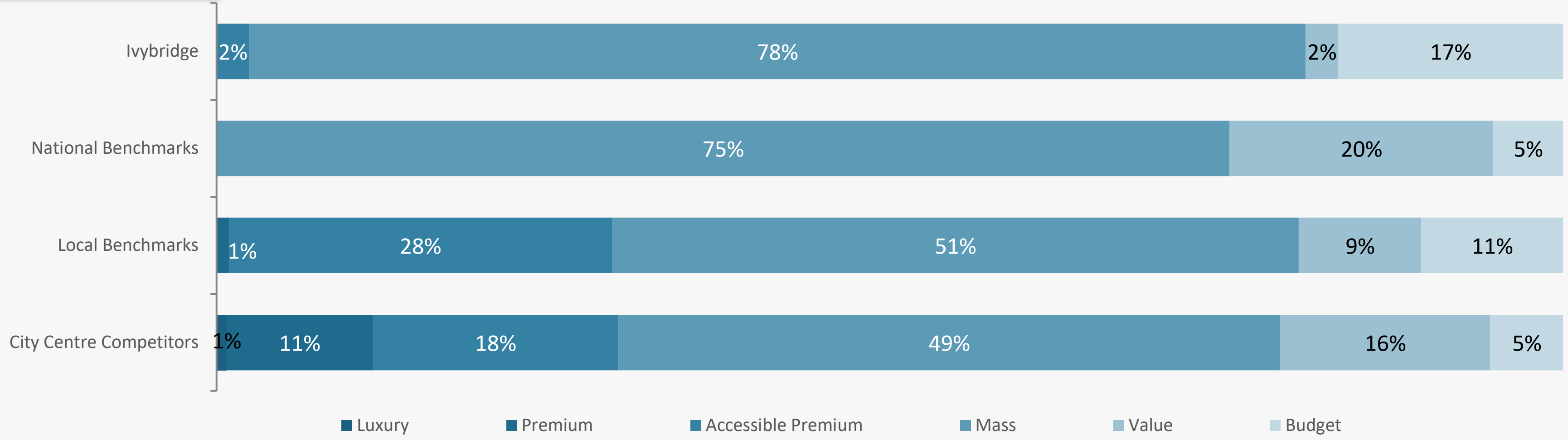
- City centre benchmarks have a much higher proportion of Clothing and Footwear, reflecting that shoppers visit these schemes for a high value, big day out trips.
- For Ivybridge to hold its own against the local and city centre competition, it needs continue to adopt a similar profile to the national benchmarks with a high proportion of Convenience Goods, through both independent bakeries and butchers as well as key supermarkets. This will encourage households in the area to perceive it as a local destination for the everyday need.

Source: Retail Footprint 2020, Local Data Company

BENCHMARKING: MARKET POSITION

Ivybridge is predominantly mass focussed and to a significantly greater extent than nearby benchmarks. Given that Ivybridge needs to satisfy the everyday need to differentiate from larger and tourist destinations nearby, ensuring a varied market positioning of brands is key.

BENCHMARK CENTRES



WHY IVYBRIDGE?

- Introducing an Aldi to the town would grow the proportion of value brands at the centre to be more in line with national benchmarks and help to satisfy the everyday need of shoppers.
- There is also scope to introduce more accessible premium and premium brands to Ivybridge given the affluent nature of households in the catchment. Clothing brands which are either independent or accessible premium brands already present in some of the local benchmarks would resonate well with affluent groups.

Source: Retail Footprint 2020, Local Data Company

IVYBRIDGE: FUTURE

WHAT HAPPENS IF WE DO NOTHING?

While across the South West there is likely to be organic growth in offline spend, the huge growth in online convenience spend highlights the need to introduce a brand with a limited online presence, reducing leakage to online. Opening an Aldi in Ivybridge will future proof the town and make it less susceptible to the threat of online as the stores convenience goods offering is offline only.

UNWEIGHTED CONVENIENCE SPEND PROJECTIONS: SOUTH WEST (£M/ANNUM)

	Current Day		2025		2030
Residential (Offline) Convenience Spend	£12,376m	+12%	£13,886m	+7%	£14,850m
Online Convenience Spend	£1,233m	+111%	£2,600m	+51%	£3,916m

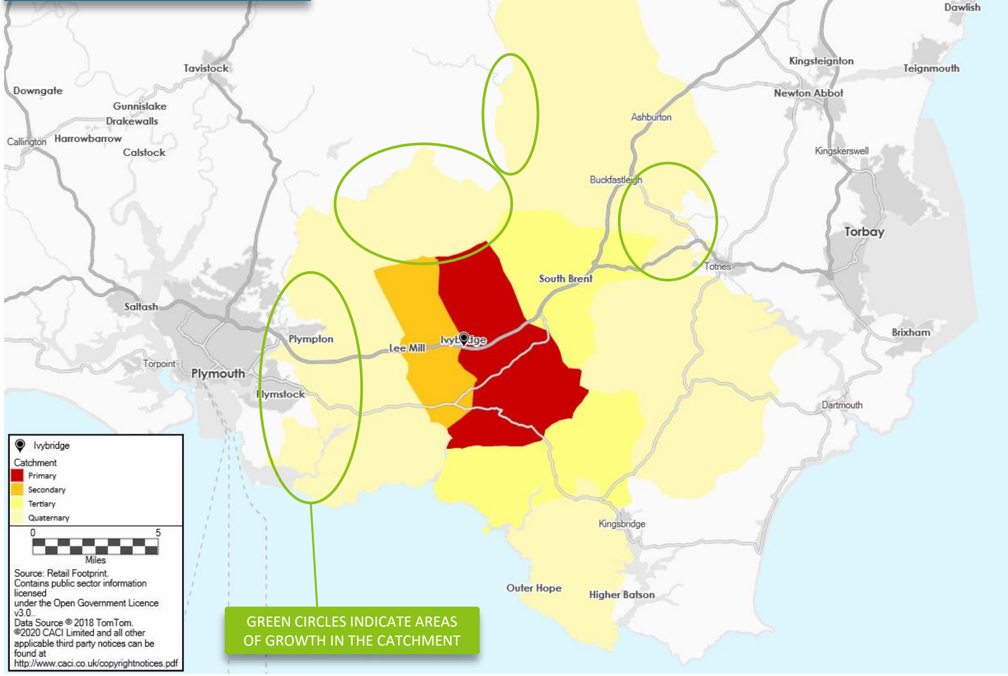
Source: CACI Spend Projections

Note: Current Day is 2019 figures to exclude the impact of Covid-19 on spend

BENEFITS OF AN ALDI IN IVYBRIDGE

Opening an Aldi in the town would grow Ivybridge's catchment; while trips from this area will be drawn in by the Aldi, there is scope to encourage cross shopping with the existing offer. Affluent shoppers are more likely to purchase at independent bakeries and butchers alongside Aldi for essentials.

AREAS OF GROWTH



BENEFITS TO IVYBRIDGE

WILL BE THE FIRST DISCOUNTER IN THE AREA

Currently the nearest Aldi is in Plympton. Introducing a new Aldi to the area will not only make it the **first discounter in the area** but also encourage more local shopping and in turn a more **sustainable shopping experience**.

ALDI WILL BRING IN MORE FREQUENT VISITORS

In CACI's Shopper Dimensions, shoppers to a discount grocery in an In Town Centre or High Street had an **annualised frequency of 76 visits per year**, this is compared to an **average frequency of 58 visits per year**.

ALDI WILL BRING NEW SHOPPERS WHO WILL CROSS-SHOP WITH THE EXISTING OFFER

Aldi is unlikely to cannibalise the current offer at Ivybridge as it **doesn't feature in house bakeries or butchers etc**. Independent brands on the high street and in Glanvilles Mill Shopping Centre will appeal to more affluent and middle income households in the catchment who **prefer to buy locally produced and UK sourced goods**.

ALDI WILL CONTRIBUTE TO EMPLOYMENT IN THE LOCAL CATCHMENT

15% aged 16-74 in Ivybridge's catchment are economically inactive (exc. retired). Aldi needs **between 30-50 staff in its new stores**, employing the majority from **within 2.5 miles of store**.

ALDI CAN BENEFIT FROM THE INCREASING LOCALISM POST COVID-19

Post-lockdown local centres are seeing a greater return in activity compared to city centres. **Ivybridge has seen a greater uplift in shoppers post-lockdown** vs. Plymouth and Exeter; highlighting the opportunity for Aldi to take advantage of this shifting trend.

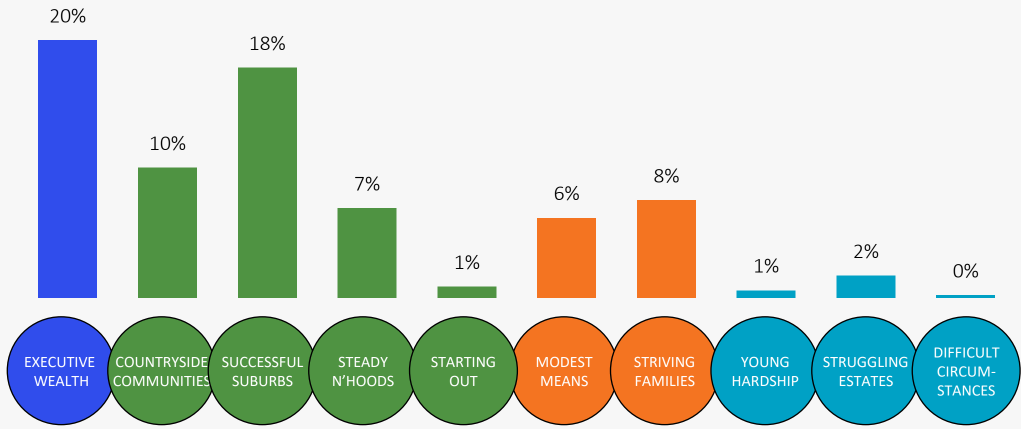
Source: Retail Footprint 2020, ProVision, Aldi Community Document, Acorn Knowledge; Shopper Dimensions

KEY SELLING POINTS FOR AN ALDI IN IVYBRIDGE

Almost three-quarters of households across the catchment are classed as family groups, across a range of affluence, who will be likely to shop in Aldi. Added to this, the area is almost exclusively made up of households from white ethnic backgrounds. A Tesco Extra within a 10 minute drive will also allow a large proportion of cross shopping between the two stores to occur.

ALIGNED DEMOGRAPHIC

% OF FAMILY GROUPS:



73%

OF HHDS IN CATCHMENT

EXISTING SUPERMARKET OFFERING IN IVYBRIDGE

10 MINUTE

DRIVE AWAY

TESCO extra

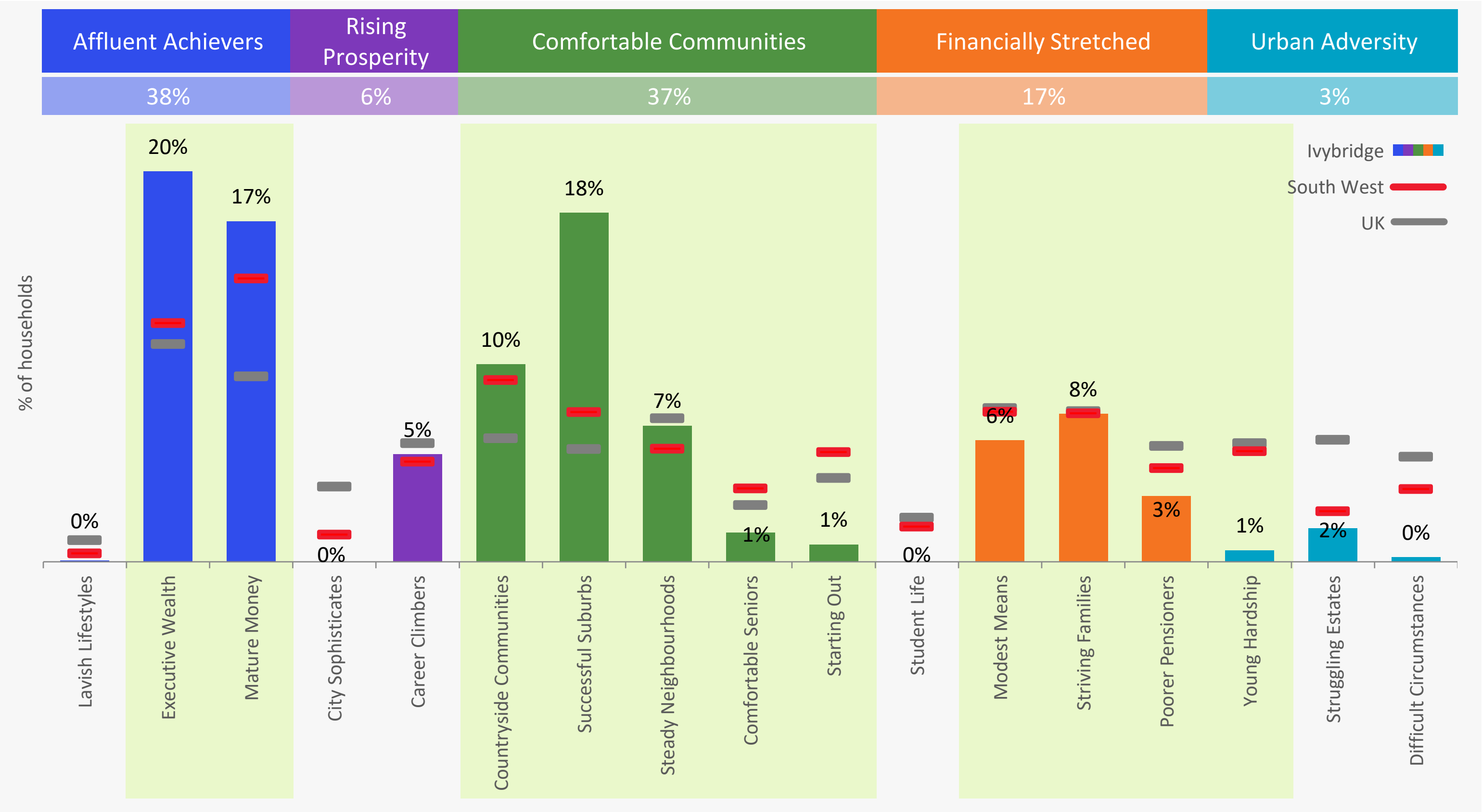
WHY IVYBRIDGE?

- Tesco's close proximity to the town centre is a positive for Aldi, as it will encourage cross-shopping to take place between the two supermarkets. This is particularly true for affluent households who won't be able to buy everything they need from Aldi and will like that they can top up their shop in the nearby Tesco. An Aldi will also appeal to Tesco shoppers already in the area on a supermarket trip.
- Tesco and the Co-op are the only other major supermarket brands in the town. This means that Aldi would be the first discounter in the area, allowing it to gain a strong foothold.

Source: Retail Footprint 2020, Acorn, Retail Acornc

APPENDIX

IVYBRIDGE: CUSTOMER



Source: Retail Footprint 2020; Acorn

IVYBRIDGE: CORE CUSTOMER GROUPS

EXECUTIVE WEALTH

Wealthy families living in larger detached or semi-detached properties either in the suburbs, the edge of towns or in semi-rural locations. High spenders across retail and catering, due to good household incomes, preferring to go for premium goods and services over the standard. This group represents the core Marks & Spencer and John Lewis shopper. They are likely to shop in independents such as bakeries, butchers and greengrocers.

DEMOGRAPHICS

Age
45-64

Household Income
£60K

House Tenure
Owned Outright

Children At Home
2

ALIGNED BRANDS WITH EXECUTIVE WEALTH

SUCCESSFUL SUBURBS

Home-owning families living comfortably in stable areas in suburban and semi-rural locations. They mainly live in three or four bedroom detached and semi-detached homes of an average value for the locality. These are households with high car ownership. As such, this group are likely to shop in Out of Town centres, such as shopping parks, retail parks and outlet centres.

DEMOGRAPHICS

Age
35-54

Household Income
£48K

House Tenure
Mortgaged

Children At Home
2

ALIGNED BRANDS WITH SUCCESSFUL SUBURBS

MATURE MONEY

Older, affluent people with the money and time to enjoy life. These people tend to be older empty nesters and retired couples, many live in rural towns and villages, in larger detached or semi-detached houses. Given their high levels of disposable income and living on the outskirts of urban areas, they are prepared to travel to shop. They regularly shop at Waitrose, Marks & Spencer and John Lewis.

DEMOGRAPHICS

Age
65+

Household Income
£46K

House Tenure
Owned Outright

Children At Home
0

ALIGNED BRANDS WITH MATURE MONEY

Source: Acorn

TARGET BRANDS FOR IVYBRIDGE

The below highlights brands which are present in benchmark centres but not yet in Ivybridge. These brands would resonate well with the affluent and middle-income demographic of Ivybridge's catchment as well as cement the town as catering for the everyday need.

BENCHMARK CENTRES

NATIONAL BENCHMARK CENTRES WITH AN ALDI

National benchmarks are more mass focussed with target brands including Aldi, WHSmith's and Clarks. Introducing either an Aldi or Greggs to the brand line up in Ivybridge would bring the market position breakdown closer to the national benchmark average.

LOCAL BENCHMARKS

Clothing and Footwear brands are more prevalent in local benchmark centres. These target brands are more aspirational but will appeal to the affluent demographic across the catchment, particularly Executive Wealth and Mature Money.

CITY CENTRE COMPETITORS

The nearby city centres, unsurprisingly host a large proportion of well known mass market brands which Ivybridge can look to minimise spend leakage. The likes of Superdrug, Flying Tiger and Waterstones would help to encourage shoppers to visit the town for their everyday needs.

Source: Local Data Company

METHODOLOGY

In order to perform this analysis CACI have used a range of tools including:

RETAIL FOOTPRINT

- Retail Footprint (RF) models the flow of people and spend across the UK to define catchments for over **4,400 retail destinations**.
- The model accounts for the retail **attractiveness** of a centre, the **location** of competing schemes, the **accessibility** of the centre and the level of demand in the area.
- The model* is **calibrated** using real world transactional (credit & debit card) data as well a mobile phone data.

RETAIL FOOTPRINT

ACORN

- Acorn is CACI's consumer **segmentation** model.
- Acorn combines geography with a wide range of **demographics** and **lifestyle** data sources to group the entire population into:
  - 5 Categories;
  - 17 Groups;
  - 62 Types.

acorn

RETAIL ACORN

- CACI conduct consumer surveys in over **200 retail locations across the UK.**
- Data on visits and spend recorded at an **individual retailer level** offers a detailed understanding of how different **Acorn groups** interact with **specific brands**
- Retail Acorn covers **over 280 top brands** in the UK, offering insight into the **brand engagement** by shopper group and **average spend**

retail acorn

CENTRE FUTURES

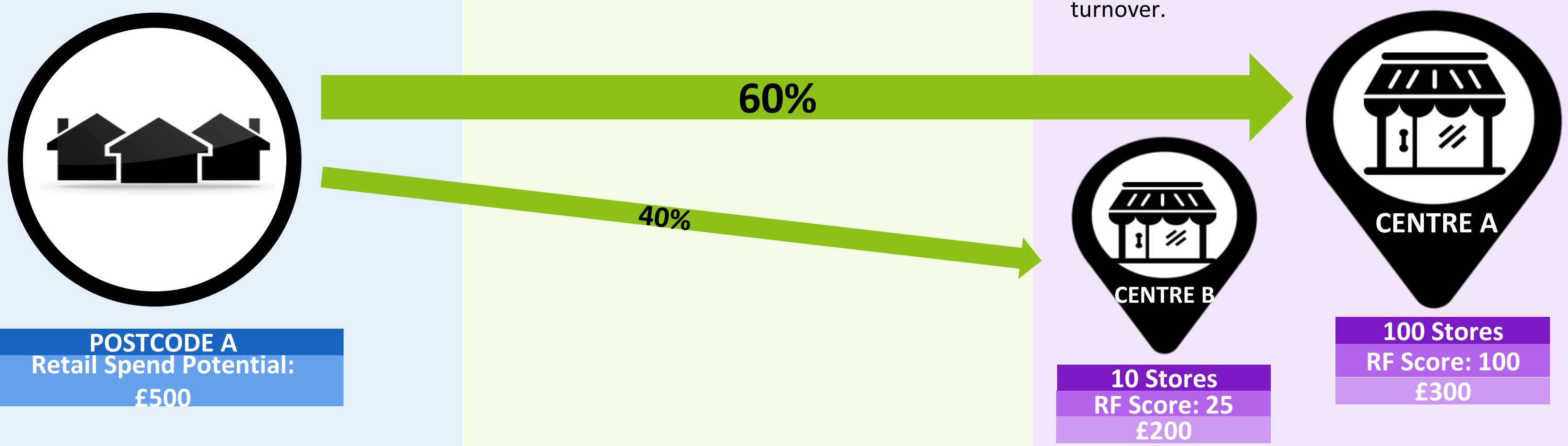
- Using **Retail Footprint (RF),** CACI has the ability to model **retail catchments in the future.**
- In order to **accurately reflect the future retail landscape** a database of future retail developments is recorded. Their assumed size and attractiveness is then used to **model the impact on existing retail catchments/flows of spend across the UK**.
- In this report a Centre Futures (CF) model of 2022 has been used to reflect the assumed opening date of the development.

CENTRE FUTURES

RETAIL FOOTPRINT GRAVITY MODELLING: OVERVIEW

A gravity model replicates customer behaviour using three main elements:

1.DEMAND	2.INTERACTION	3.SUPPLY
The location of the customer when they start their shopping journey and the money they have available to spend on retail. This is distributed by the smallest geographical zone available (Postcode).	The way in which retail spend is distributed is allocated based on centre attractiveness and the time/cost it takes to travel from the demand location to the retail supply.	Retail points of supply, typically shopping destinations. Centre class and centre score determine their attractiveness to consumers. The class takes into account how different types of centres interact with their catchment. The score is a function of tenants in a centre’s average turnover.

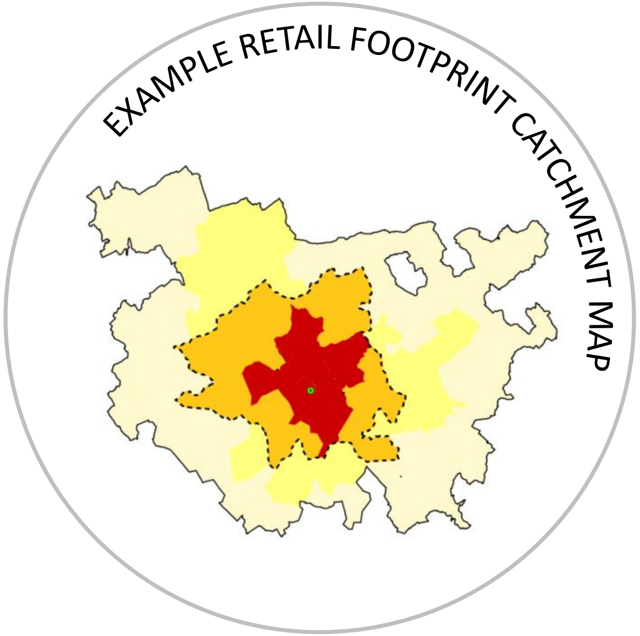


Source: Retail Footprint

RETAIL FOOTPRINT CATCHMENT AREAS

75% of spend is expected from the Core catchment

- Each catchment defined by the gravity model is split into four; Primary, Secondary, Tertiary and Quaternary. This is based on the proportion of trade expected to originate from each catchment area.
- The model expects 50% of trade/shoppers to originate from the Primary catchment area, the following 25% to originate from the Secondary catchment and the following 15% from the Tertiary.
- The final 10% of trade is expected to originate from the Quaternary catchment. This catchment area contains less frequent shoppers and as such covers a much larger geographical area. With 90% of trade expected to originate from the Primary, Secondary and Tertiary catchment areas it is this Major Catchment that should be the focus.



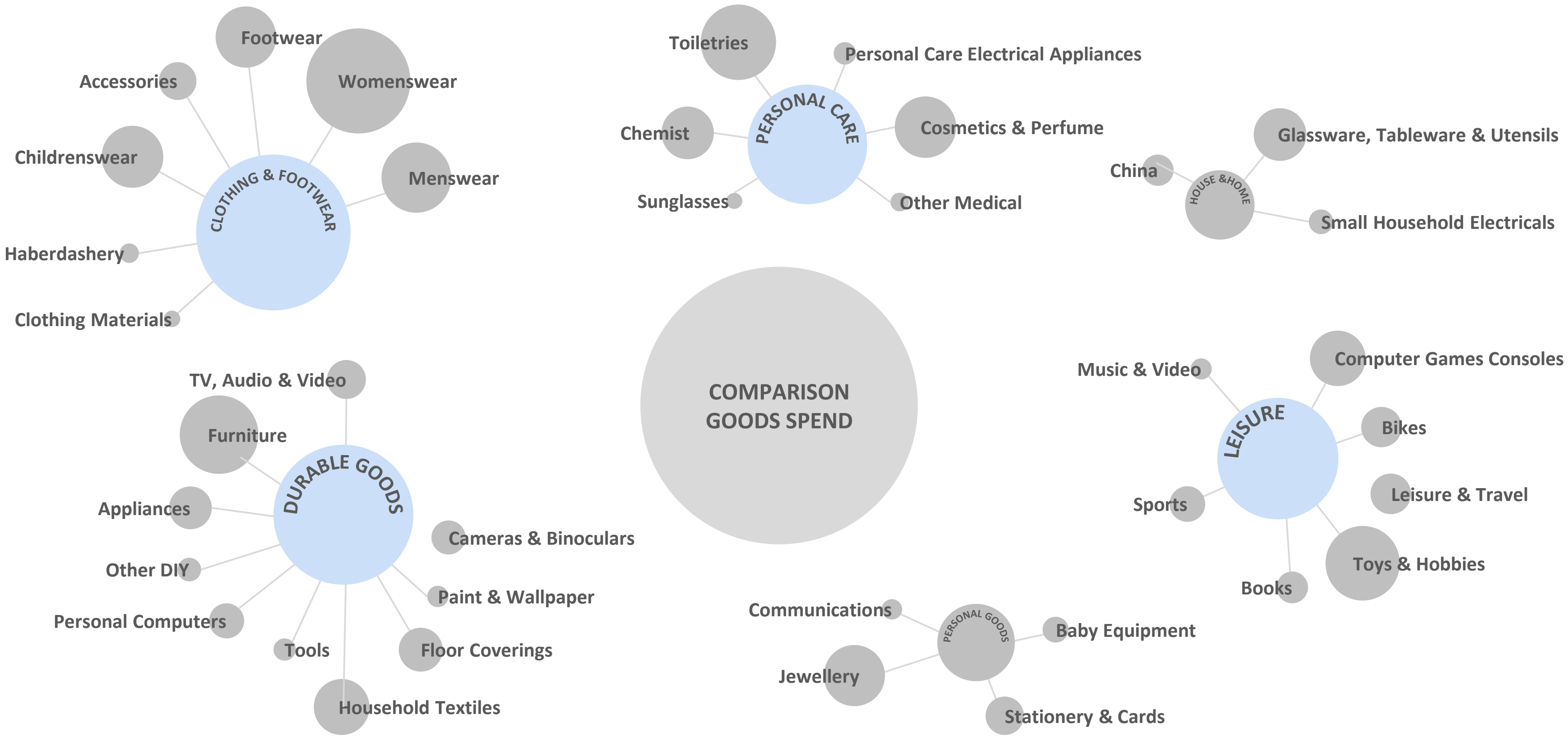
% Percentage of Trade

PRIMARY:	SECONDARY:	TERTIARY:	QUATERNARY:
50%	25%	15%	10%

CORE CATCHMENT

TOTAL CATCHMENT

RETAIL SPEND CATEGORIES

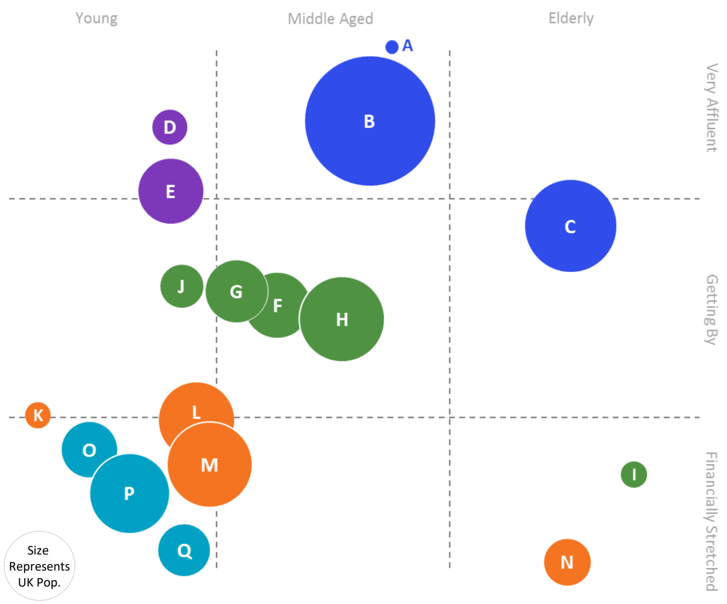


ACORN IS THE INDUSTRY STANDARD CONSUMER SEGMENTATION

- A Lavish Lifestyles
- B Executive Wealth
- C Mature Money
- D City Sophisticates
- E Career Climbers
- F Countryside Communities
- G Successful Suburbs
- H Steady Neighbourhoods
- I Comfortable Seniors
- J Starting Out
- K Student Life
- L Modest Means
- M Striving Families
- N Poorer Pensioners
- O Young Hardship
- P Struggling Estates
- Q Difficult Circumstances

Acorn is a geo-demographic classification that segments the UK population according to their lifestyle, lifestage and affluence.

acorn

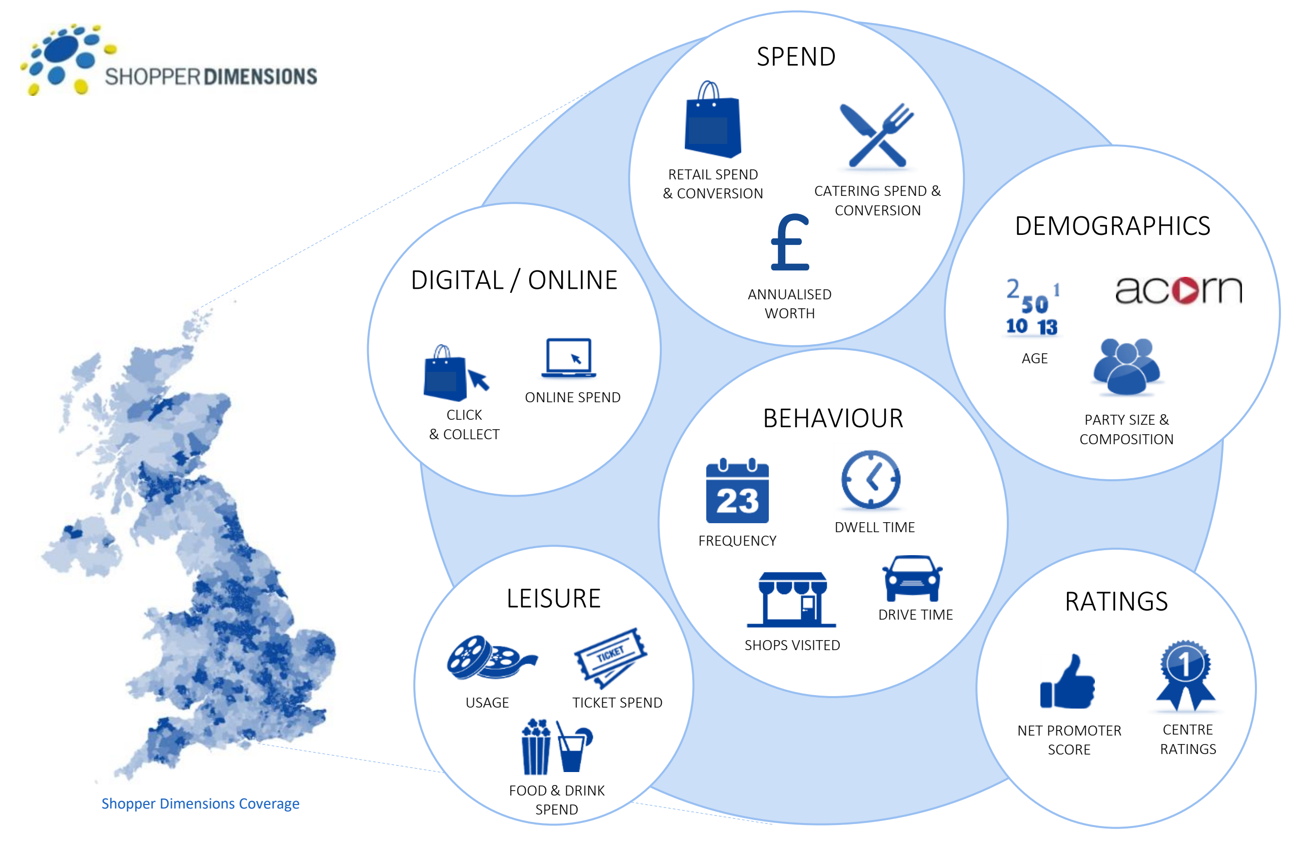


Classifies every UK postcode

Available at 3 levels:
6 Categories, 18 Groups & 62 Types

Common language across media, agencies and marketing organisations

SHOPPER DIMENSIONS



WHAT IS SHOPPER DIMENSIONS?

- ✓ CACI conduct **standardised consumer interviews** in all types of **retail centre** throughout the **UK**. Shoppers provide information on all aspects of their trip on that day.
- ✓ Shopper Dimensions aggregates the data, enabling you to **benchmark a centre** against the **class average** and assess **how the centre is performing**.
- ✓ Shopper Dimensions is the most **comprehensive in-centre research study** and provides an unprecedented **view of the UK consumer**.

LATEST NUMBERS:

889K SURVEYS

250+ RETAIL LOCATIONS

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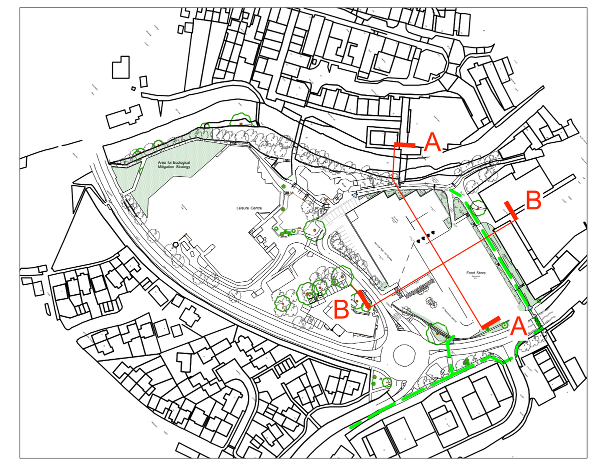
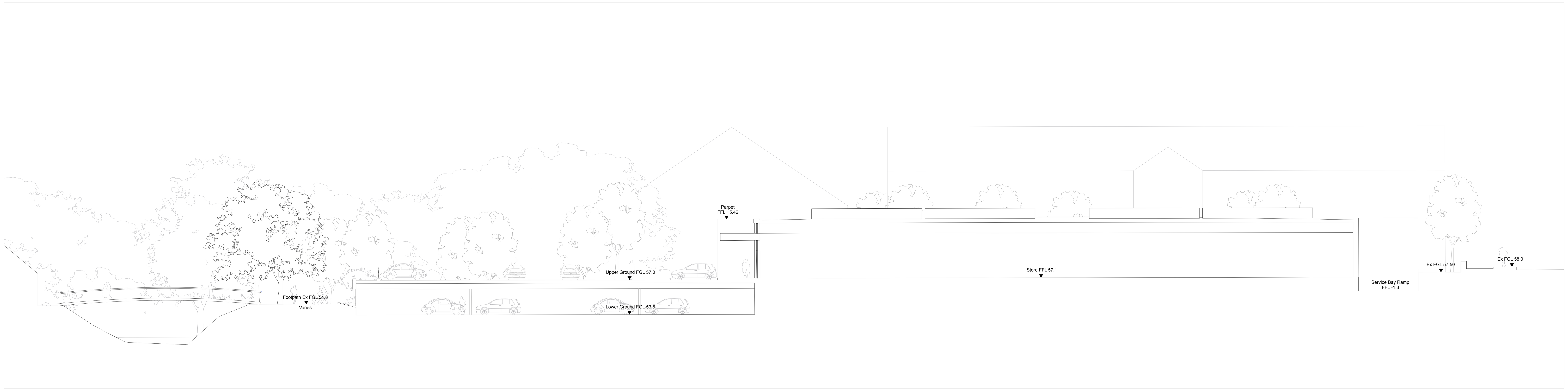
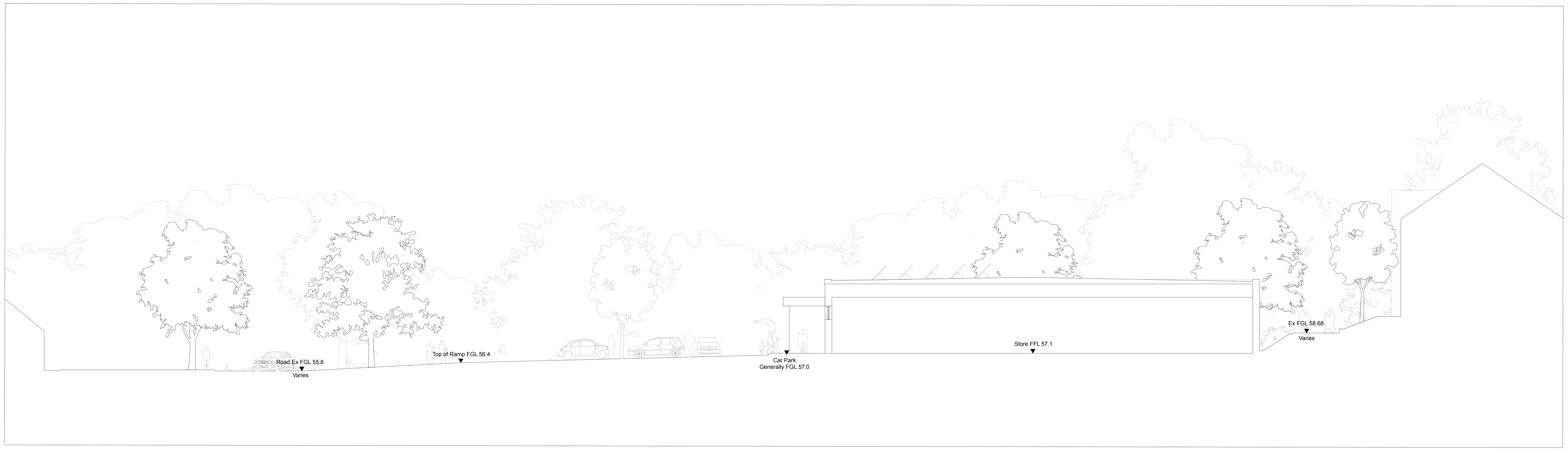
NOTES:





Site Section on AA



Site Section on BB

FOR DISCUSSION

REV	DATE	NOTES	CHK

Client

South Hams District Council

Project

Leonards Road Development
Ivybridge

Drawing Title

Ivybridge - St. Leonards
Proposed Site Sections - Illustrative

Drawn	Checked	Paper Size	Scale	Date
IW	IW	A1	1:500	July 2020

Project No.	Drawing No.	Revision
18052	0025	02

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NOTES:

Approximate Location of Storm Drain

3.7m Offset from c/l of Storm Drain

Demise

Reserved Parking Spaces

Existing Trees to be removed

PRELIMINARY

REV	DATE	NOTES	CHK

Client

South Hams District Council

Project

Leonards Road Development
Ivybridge

Drawing Title

Proposd Site Plan

Drawn	Checked	Paper Size	Scale	Date
IW	IW	A1	1:500	Sept 2020

Project No.	Drawing No.	Revision
18052	0026	08

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NOTES:

Approximate Location of Storm Drain

3.7m Offset from c/l of Storm Drain

Application Boundary

Ownership Boundary

Reserved Parking Spaces

Existing Trees to be removed

PRELIMINARY

REV	DATE	NOTES	CHK

Client

South Hams District Council

Project

Leonards Road Development
Ivybridge

Drawing Title

Upper Ground Floor Plan

Drawn	Checked	Paper Size	Scale	Date
IW	IW	A1	1:200	Nov 2020

Project No.	Drawing No.	Revision
18052	0032	01

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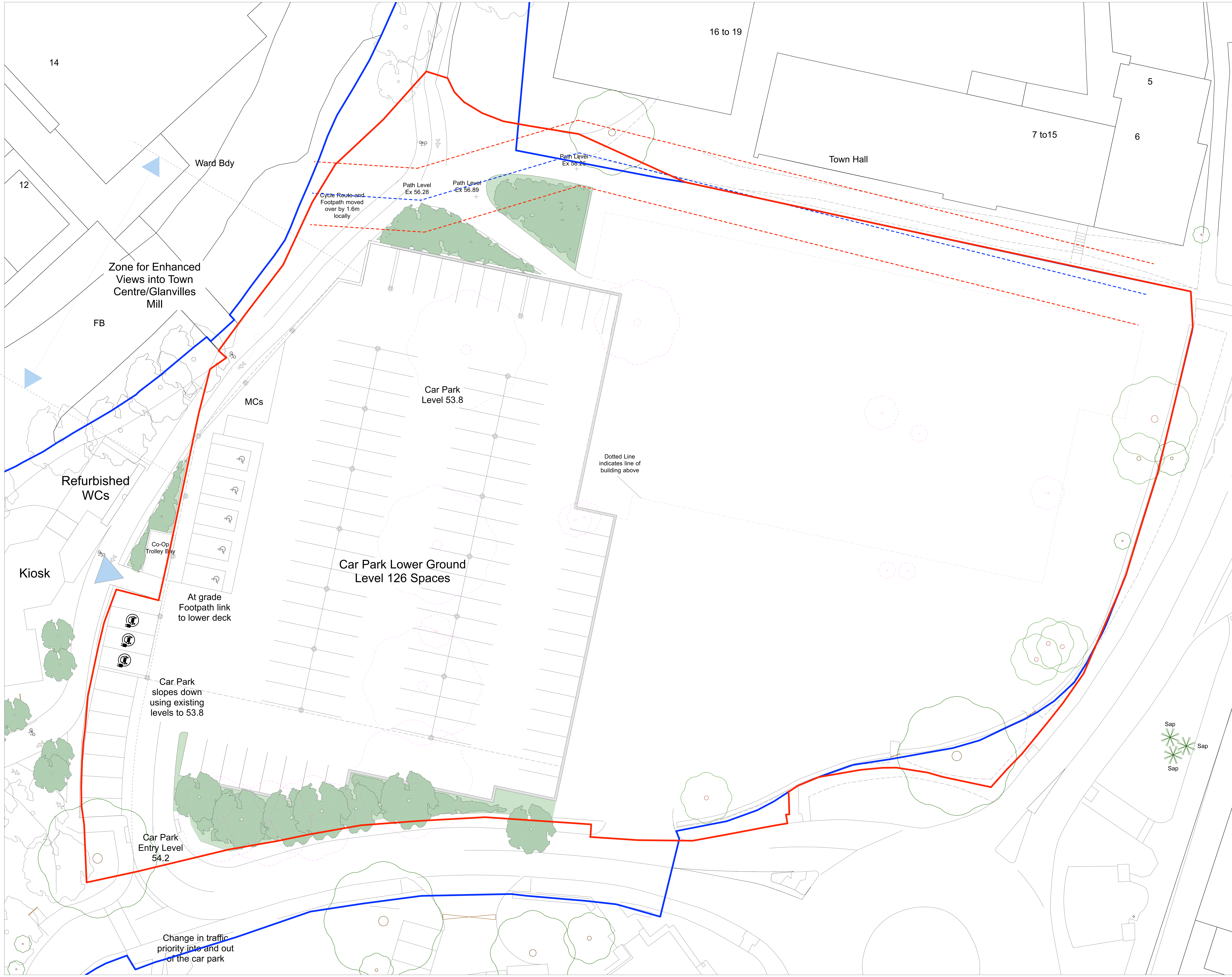

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NOTES:

Approximate Location of Storm Drain
3.7m Offset from c/l of Storm Drain
Application Boundary
Ownership Boundary
Reserved Parking Spaces
Existing Trees to be removed

PRELIMINARY

REV	DATE	NOTES	CHK

Client
South Hams District Council

Project
Leonards Road Development
Ivybridge

Drawing Title
Lower Ground Floor Plan

Drawn	Checked	Paper Size	Scale	Date
IW	IW	A1	1:200	Nov 2020

Project No.	Drawing No.	Revision
18052	0033	01

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