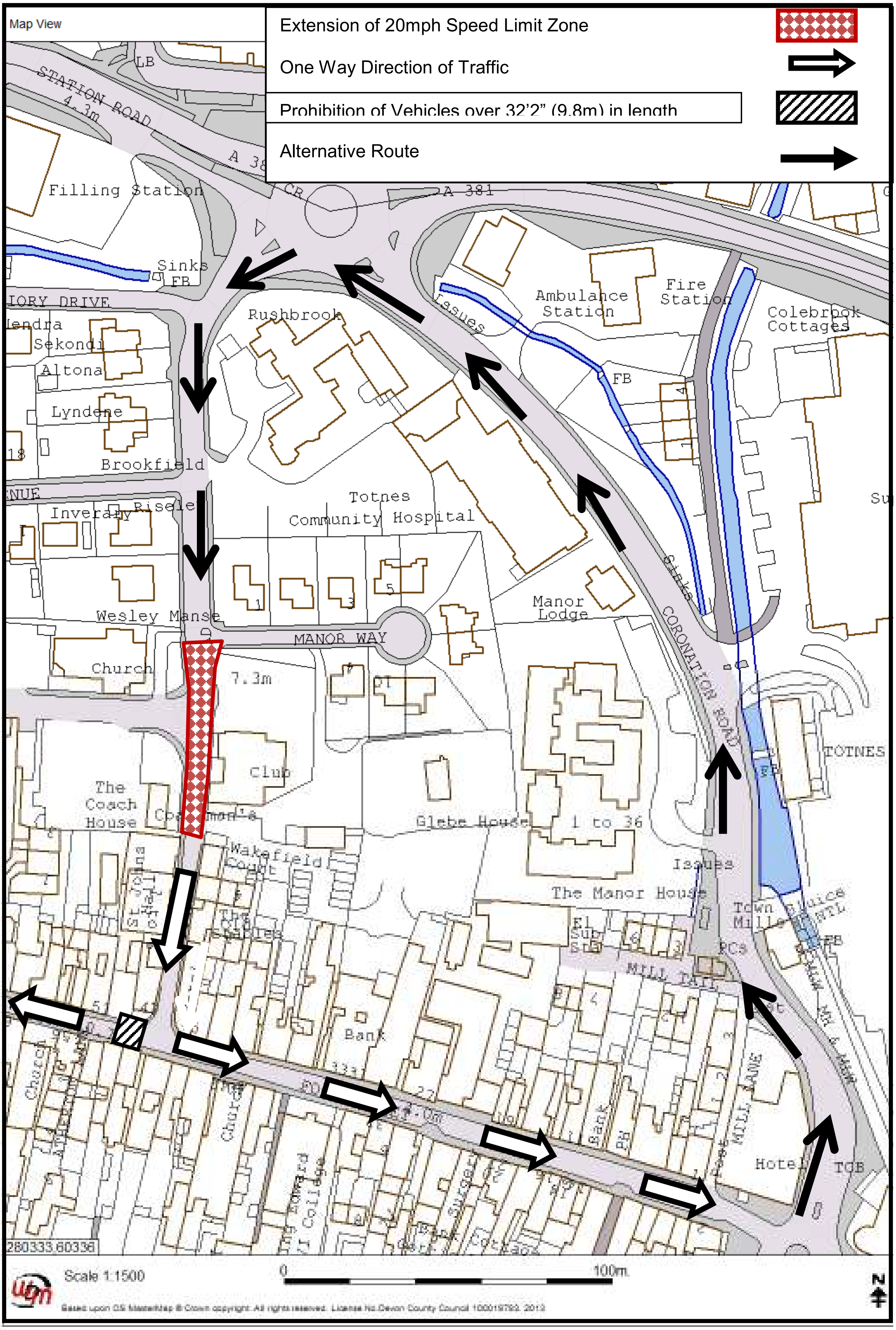
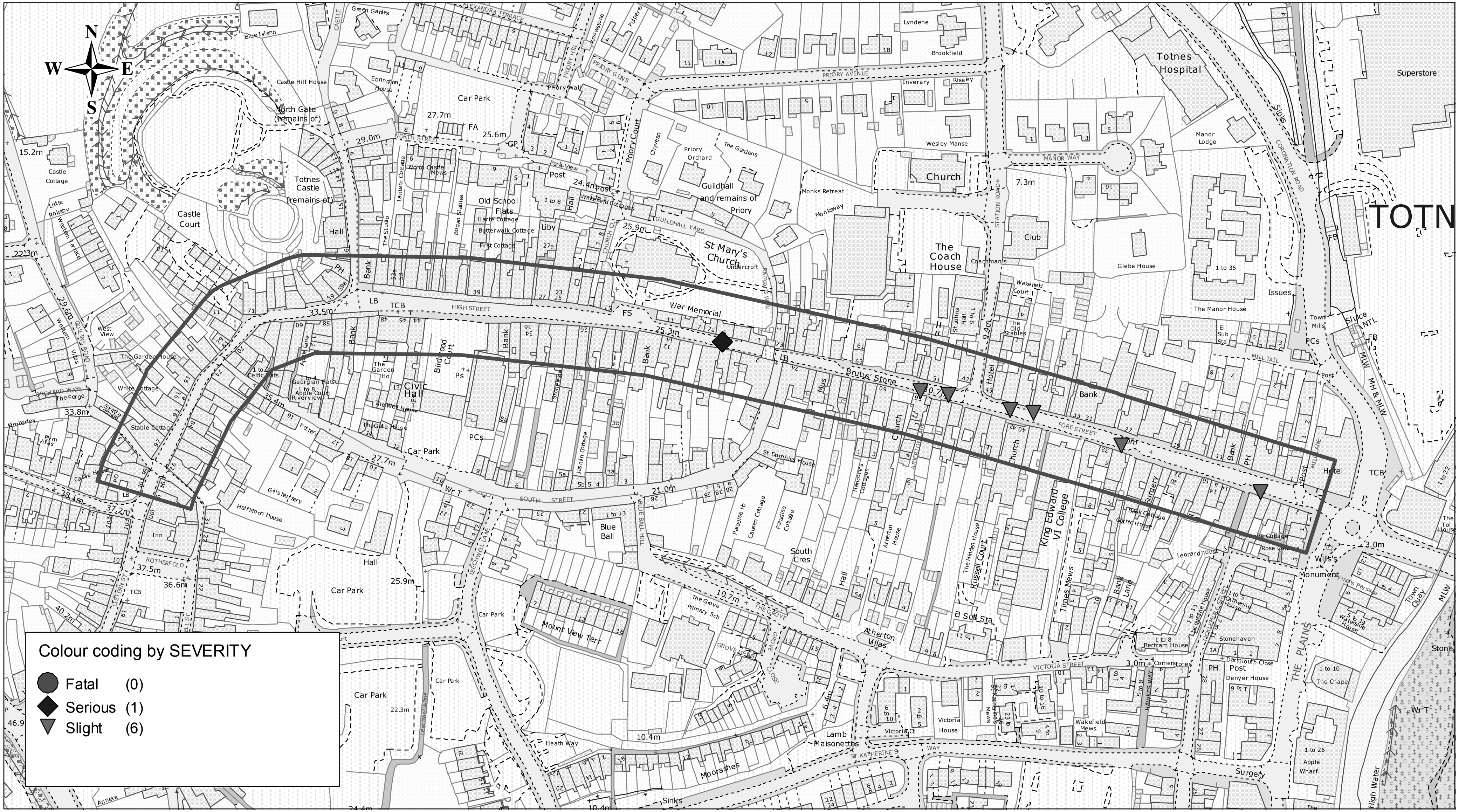
Appendix I - ETRO Plan





Totnes

This data covers injury collisions reported to/recorded by the Police between dates 01/01/2009 and 31/12/2011

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DATE	08/04/2014
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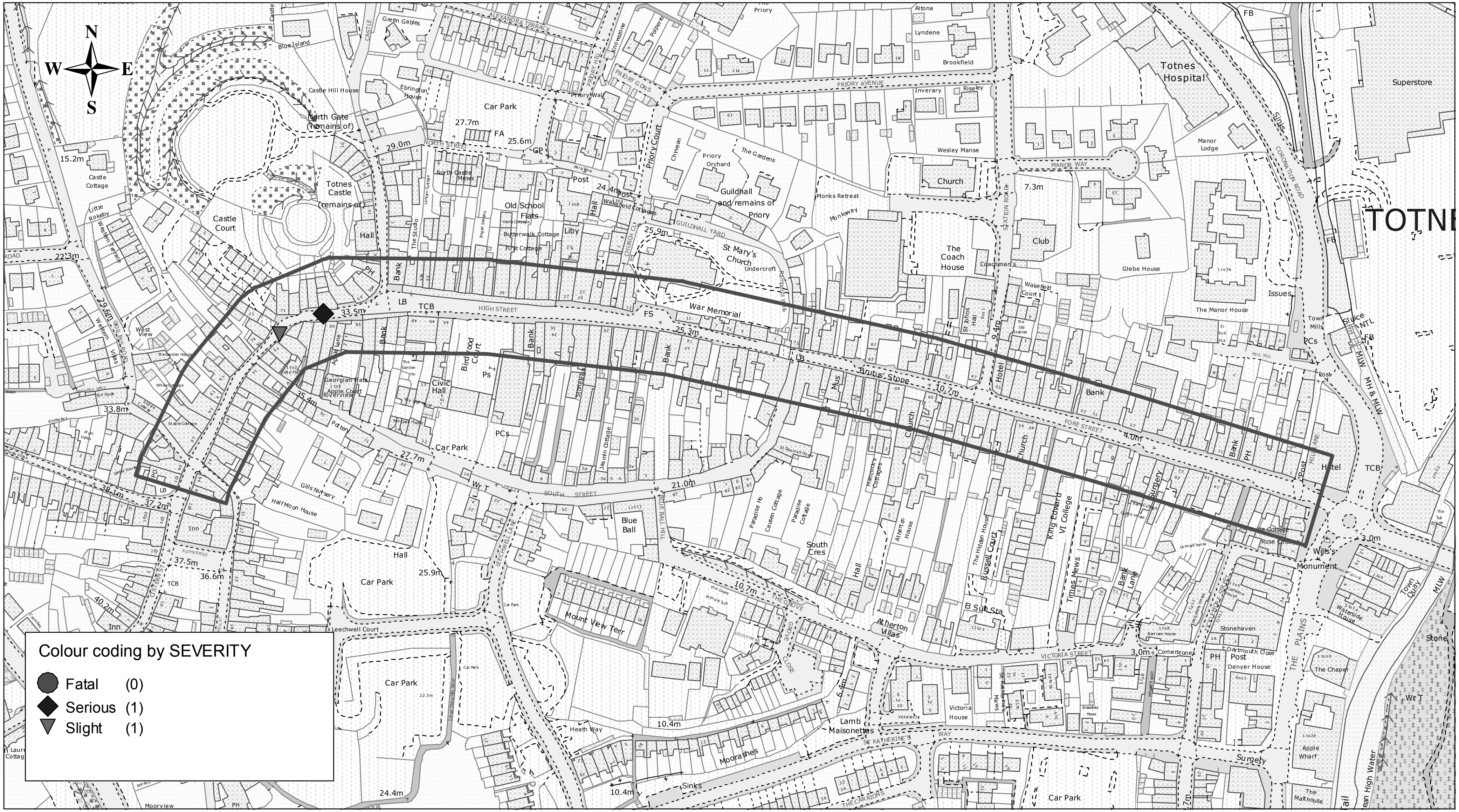
Devon County Council



Totnes

This data covers injury collisions reported to/recorded by the Police between dates 01/04/2013 and 31/12/2013*

*2013 data is provisional and subject to change until fully validated by the DfT (due approx April/May 2014)

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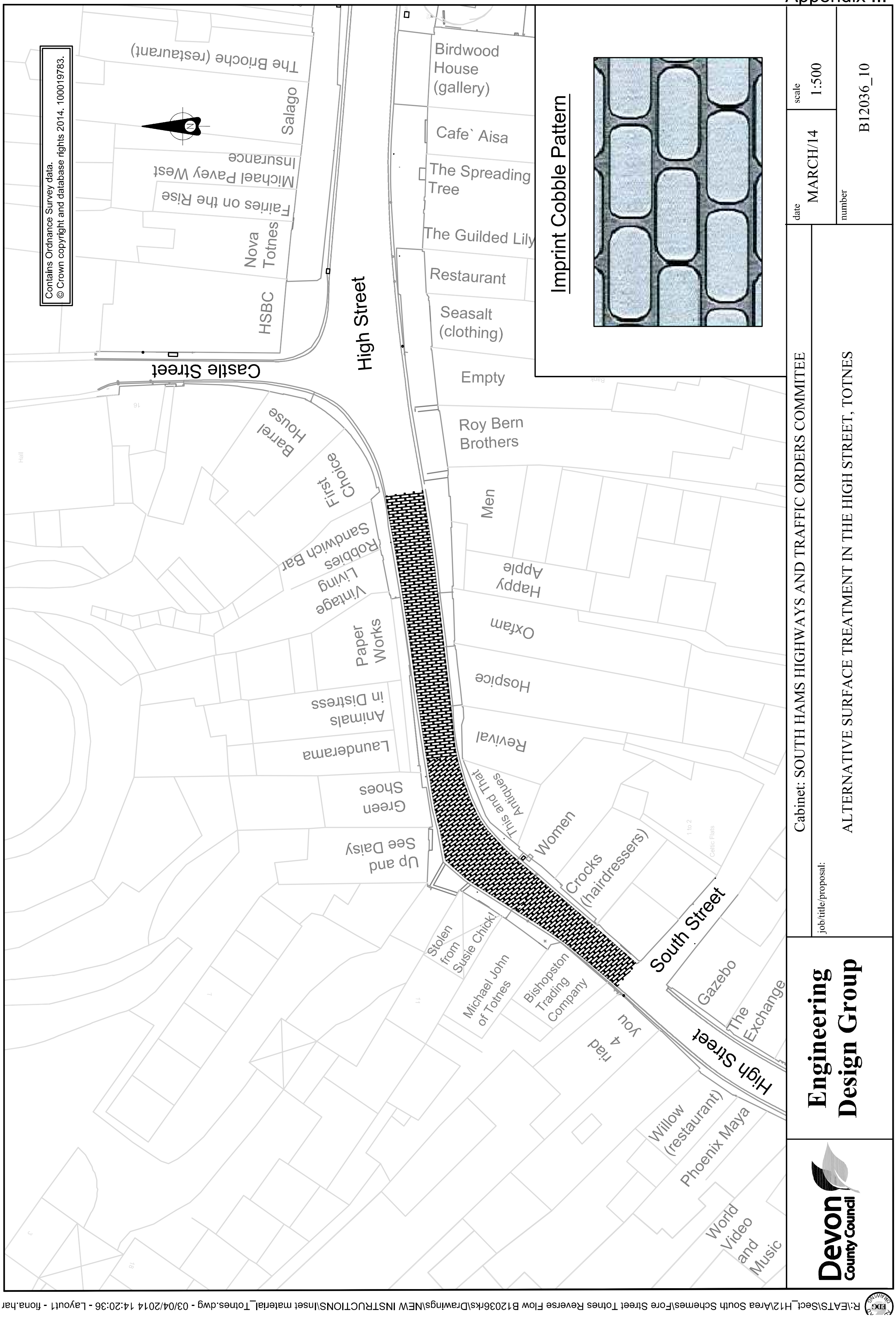
Devon County Council

Appendix III



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Totnes Traders Action Group

Totnes Experimental Traffic Order:
Economic Impact Study

A report by
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April 2014

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Executive Summary

1 This report sets out the findings of research aimed at investigating the economic impact of the ETO affecting Totnes town centre. The aim of the ETO was to address concerns over highway safety arising from the use of Fore Street and High Street as a short cut to avoid congestion on the main routes through Totnes contrary to Traffic Regulations. The research was been commissioned by Totnes Traders Action Group with financial support from Devon County Council and Totnes Town Council.

2 At the heart of the report lies a survey of town centre shop-based businesses which achieved a response rate of around 40% of the questionnaires distributed and a sample of just under 30% of the total population of relevant businesses. Given the complexity and confidentiality of the information sought, the response rate fell within the expected range and the information collected provides a reasonable evidence base against which to consider the economic impact of the ETO. Given that multiple retailers tend not to respond to surveys of this nature the sample is biased towards independent businesses which are the key feature of Totnes' town centre offer.

3 A street survey was also undertaken of visitors to the town centre over 5 days at the end of February and early March. This sought to establish information to understand whether and how the ETO has affected people's behaviour. A total of 186 interviews were conducted.

4 The research has identified that over the past three years business in Totnes town centre has flatlined. During 2013 some 7 months have been below trend, by comparison with 4 in 2011 and 5 in 2012. Turnover over the crucial Christmas period has declined year on year over the same period. While businesses recognise the challenges arising from weak economic conditions and new sources of competition, they specifically identity footfall as being the most significant factor in their performance over the past 12 months.

5 Evidence collected from business suggests that footfall in the town has fallen by between 5 and 15% over the past 12 months. Around half of businesses surveyed report falling revenue compared to the prior year since the introduction of the ETO. However a number of businesses have been able to buck this trend and grow their turnover.

6 In the face of these circumstances businesses have to work harder to convert fewer customers in the town centre into sales. A range of responses have been identified leading to reduced margins and profitability as well as staffing reductions. Worryingly 17% of businesses have injected more working capital and 10 to 15% of respondents do not expect to be in business in Totnes town centre 1 to 3 years. This is equivalent to 20 or 30 businesses and could lead to an increase in Totnes' low and. until now, stable vacancy rate.

7 Information collected from both businesses and visitors suggest that the ETO is leading to a significant change in shopper behaviour, particularly for car based visits. While to some degree this was part of the aim of the ETO, it also appears to have had the following consequences:

- Reduction in short stay convenience trips to the town centre - 'pop and shop'.
- Reduction in the ability of shoppers to visit all Fore Street and High Street leading to shorter trips.
- Reduction in the number of shopping trips by residents of surrounding villages thereby undermining Totnes' role as a local market town.
- Diversion of trade to supermarkets and other centres which offer convenient access and parking
- Improved environmental conditions for pedestrians in the town centre and a perception of greater safety.

8 11.4% of those responding to the shopper survey, who were aware of the ETO, indicated that they were visiting the town centre less. In contrast 5% said they were using it more. However the survey did not capture those who now shop entirely in the town's supermarkets or elsewhere suggesting that the loss of trade is greater. Evidence from Bob the Bus also highlights a 25 to 30% reduction in patronage during 2013 due in part to the more circuitous route resulting from the ETO.

9 Notwithstanding the limitations of the research which was undertaken over a short period of time with relatively limited resources, the report provides useful information to assist in decision making on the future of the ETO which has sought to find an appropriate balance between supporting business growth and employment whilst at the same time promoting highway safety and environment objectives..

10 On the evidence assembled it is clear that less people are visiting Totnes Town Centre, particularly by car, with the result that a significant proportion of town centre businesses have seen a marked reduction in turnover. This is leading to a reduction in business profitability and loss of employment in a sector which is the town's largest source of jobs. In this regard the ETO is undermining Totnes' function as a market town and area centre and making it increasingly dependent on tourism and day trippers. For a number of businesses this situation is likely to be unsustainable and will result in an increased number of business closures.

11 In this regard the report concludes that the benefits sought by the ETO are coming at a significant local economic cost and that alternative ways need to be found of delivering a truly sustainable solution to the challenging problem of managing vehicular access in the historic core of Totnes.

1.0 INTRODUCTION

1.1 This report sets out the findings of research commissioned by Totnes Traders Action Group with financial support from Devon County Council and Totnes Town Council into the economic impact of the Experimental Traffic Order (ETO) introduced to improve pedestrian safety by reducing 'rat running' through Fore Street, High Street and the Narrows in the historic heart of Totnes Town Centre.

1.2 The traffic management scheme introduced through the ETO in April 2013 closed the access to Fore Street from The Plains replacing this with an access via Station Road at which point traffic has the option of turning left into the lower part of Fore Street or right into upper Fore Street and thence to High Street and the Narrows.

1.3 These changes were introduced in response to concerns about pedestrian safely arising from motorists who ignored the 'Except for Access' regulation and used Fore Street and High Street as a short cut, particularly at peak hours when the main traffic routes around the town become congested.

1.4 While the proposals had been the subject of consultation by Devon County Council and were reflected in the Totnes Transport Strategy published in Dec 2012, it was not long before concerns were being expressed by town centre businesses about the impact of the changes on trading performance. In July 2013 Totnes Chamber of Commerce prepared a report on trading conditions in Totnes town centre since the introduction of the ETO. This sought to provide both quantitative and qualitative data on the impact of the ETO over the first three months of its operation. The report concluded that the introduction of the new traffic management measures had had an adverse impact on trade beyond that experienced elsewhere and requested that the ETO be removed.

1.5 In the event Devon County Council's Highways and Traffic Orders Committee (HATOC) decided that the scheme should stay in place for a further experimental period to enable its effectiveness to be fully assessed.

1.6 By the autumn of 2013 concerns were once again raised regarding the impact which the revised traffic arrangements were having on footfall and custom in the town. This resulted in the preparation of a draft brief for an independent study of the economic impact of the ETO on the town centre. This sought to respond to a request from Devon County

Council for a piece of work which sought to isolate the effect of the ETO from other factors which might be affecting the performance of the town centre. While acknowledging the methodological difficulties of achieving this, a final brief was agreed for the work which provides the basis of this report.

1.7 The work was formally commissioned at the end of January since which time a detailed questionnaire survey has been undertaken involving town centre businesses as well as a street survey of shoppers. In addition a variety of background and contextual information has been assembled.

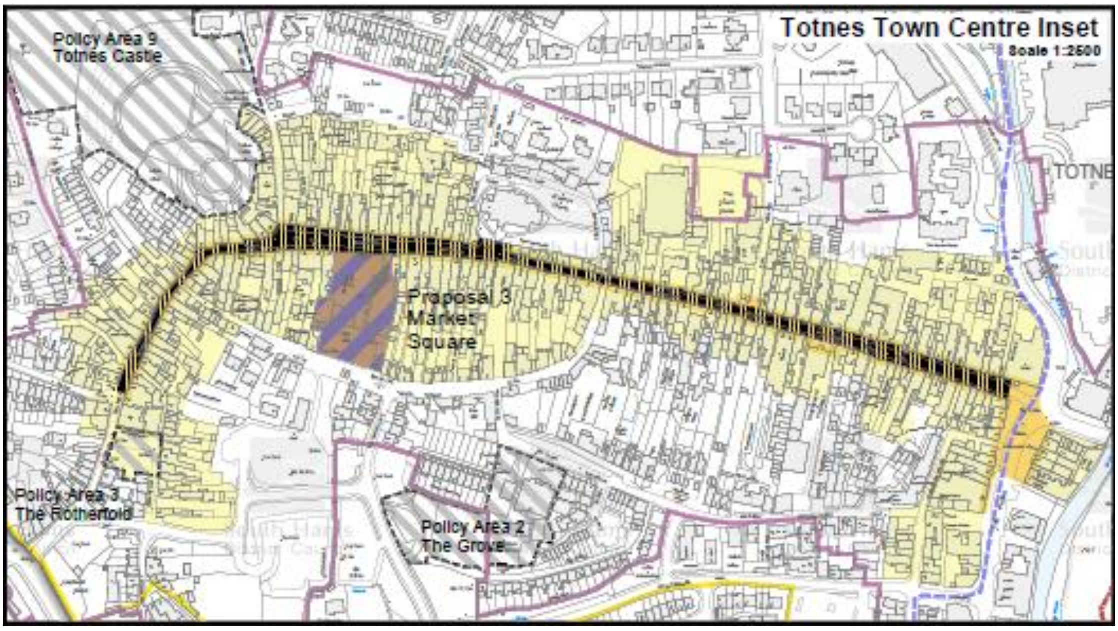
1.8 It is clear that there are a great many different views on the merits and demerits of the ETO. Many of these reflect the positionality of the various stakeholders involved and are informed by observations based on personal experience as well as anecdotal evidence circulating in the community. This has been the subject of much debate through a series of articles and letters printed in the local media.

1.9 The aim of this research has been to provide, as far as possible, a sound evidence base against which the economic impact of the ETO may be judged almost a year after its introduction. Its focus is specifically upon the impact of the scheme on the trading performance of the town centre based on information obtained from shop based business and shoppers. However it seeks to place the findings in the context of wider trends affecting town centres to help with the interpretation of the results

2.0 STUDY AREA CONTEXT

Totnes Town Centre

2.1 The focus of the research is upon Totnes town centre. The study area is shown in Figure 1 which identifies the Central Shopping Area and the primary retail frontage. The research has identified some 218 shop based premises within the study area of which 135 accommodate predominantly retail businesses and 83 accommodate service businesses such as bars, restaurants/cafes, and hairdressers. It is recognised that there are a number of businesses which operate from first floor premises. These were not the target of the research which was primarily concerned to understand whether the ETO has had an impact on those town centre businesses which depend fundamentally on footfall.



Source: South Hams DC, Totnes & Dartington DPD Preferred Options 2007
Figure 1 Map showing Totnes Central Shopping Area and Primary Frontage

Totnes Market Town Area

2.2 As a market town the town centre serves both Totnes itself and the surrounding parishes. Devon County Council have divided the county into 29 town areas based on a combination of travel patterns, shopping and school catchments and local parish boundaries. Totnes town area, for which a range of statistics are available covers the town itself and the surrounding parishes of Ashprington, Berry Pomeroy, Cornworthy, Dartington, Diptford, Halwell & Moreleigh, Harberton, Littlehempston, Marldon, Rattery, South Brent, Staverton, and Stoke Gabriel as shown on Figure 2 below.

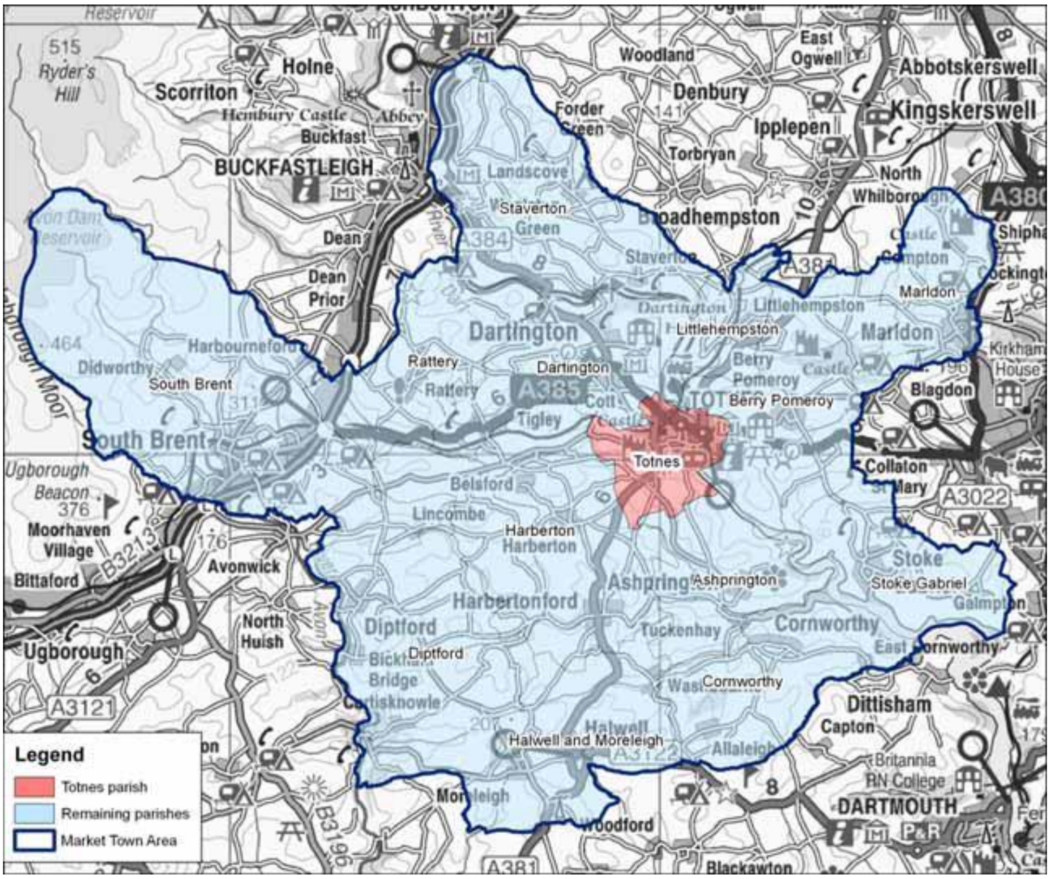
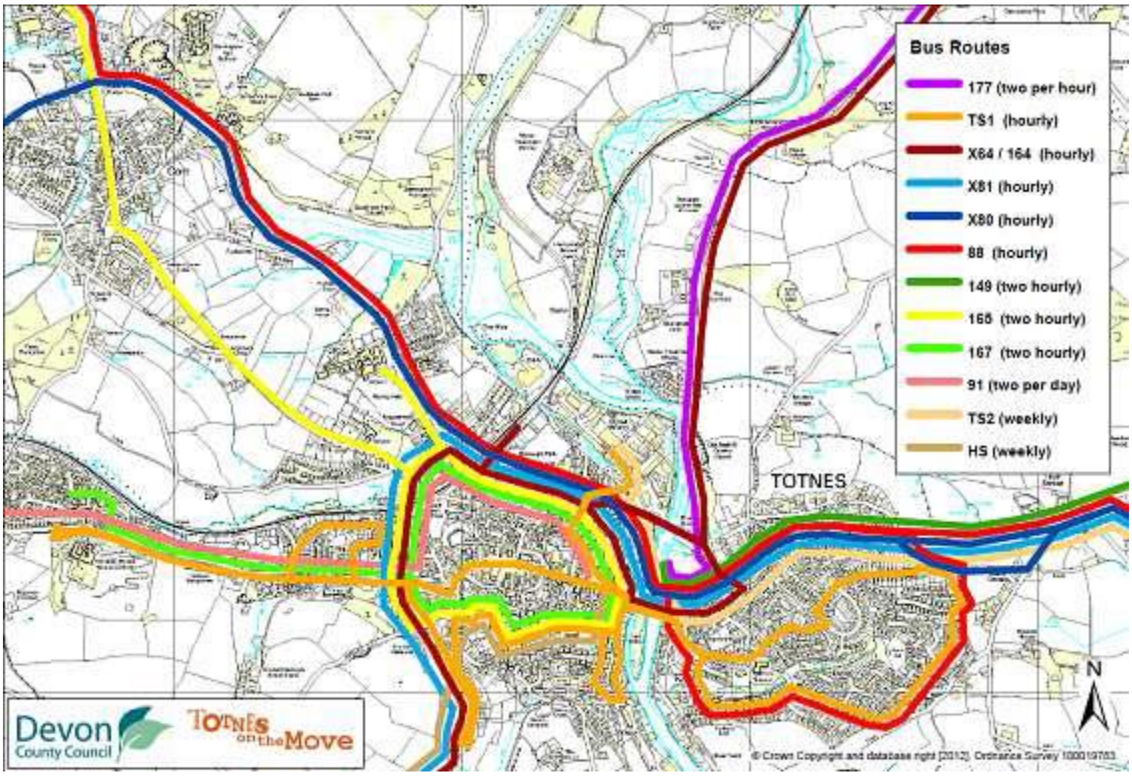


Figure 2 Map showing Totnes Market Town Area

2.3 The population of the market town area increased by 2.3% between 2001 and 2011 to 25,137. The majority of the growth occurred in parishes surrounding the town (3.2%) whereas the population of the town was broadly stable increasing by only 0.4% to 8076. Reflecting its role as an Area Centre more than two thirds of Totnes' natural population catchment lives outside the town.

Access to the Town

2.4 Given the relatively low density and frequency of public transport which is typical of rural locations, (see Figure 3) it is clear that the majority of the population who travel to Totnes town centre will do so by car. Survey data reported in the Totnes Transport Strategy prepared for Devon County Council in Dec 2012 indicates that up to 89% of commuter trips into and out of Totnes are made by private car although in 2001 the census recorded that just 34% of commuter journeys within the town were made by car, reflecting the shorter distances involved and the availability of viable alternatives such as walking and cycling. However growing reliance on the car is revealed by the fact that between 2001 and 2011 the number of cars in the Totnes town area increased by 2044 (14.5%) while the number of households increased by just 613 (5.8%).



Source: Devon CC, Totnes Transport Strategy Dec 2012
Figure 3 Bus routes serving Totnes

2.5 Totnes benefits from its strategic location in relation to roads, rail and river lying at the lowest fixed crossing points of the River Dart. The A375 corridor which passes through the town connects the major urban areas of Plymouth and Torbay via the A38 Devon Expressway while the A381 which runs from Newton Abbot to Kingsbridge and Salcombe converge at Totnes as shown in Figure 4. However as a result of limited crossing points over the River Dart and main railway line and the presence of major road junctions Totnes suffers from traffic congestion particularly at peak times of the day and at holidays. Indeed the Totnes Transport Strategy reports that Totnes is considered the fourth most congested town in the county.

Source: Devon CC, Totnes Transport Strategy Dec 2012
Figure 4 Map showing the convergence of main roads at Totnes

2.6 Through traffic, which accounts for around 70% of trips on the A385 at Station Road, contributes significantly to the congestion on the main routes leading into the town. Between 2005 and 2011 cordon counts undertaken on the main routes serving the town suggest that traffic volumes fell slightly (by a little under 3%). This is likely to have been due to deteriorating economic conditions and real increases in the cost of motoring and mirrors data for other A class rural roads in the South West.

2.7 Discussion with Devon County Council's traffic management team indicates that traffic growth through the town has now resumed as the economy has started to recover and with that growth and the changed flows associated with the ETO, there has been some increase in congestion as measured by journey times into and through the town.

2.8 Clearly congestion may act as a deterrent to people visiting the town centre for shopping and other services. Information contained within the Totnes Transport Strategy indicates that the main periods of delay on the A385 coincide with journeys to and from work and school. In contrast evidence collected during previous research undertaken by Plymouth University in 2012 indicates that the main period of pedestrian activity in the town centre is from 10-00 through to 16-00. This pattern is reflected in the opening hours of the independent shops many of whom open at 09-30 or 10-00.

Totnes Transport Strategy

2.9 In the absence of credible options for bypassing the town and faced with the prospect of increased traffic arising from planned local housing growth and reflecting the objectives of the Devon and Torbay Local Transport Plan and the Local Sustainable Transport Fund, the Totnes Transport Strategy has been prepared to:

1) People Place First:
- People are to be connected to key land uses by walking/ cycling links.
- The network is to be safe, legible and consistent..

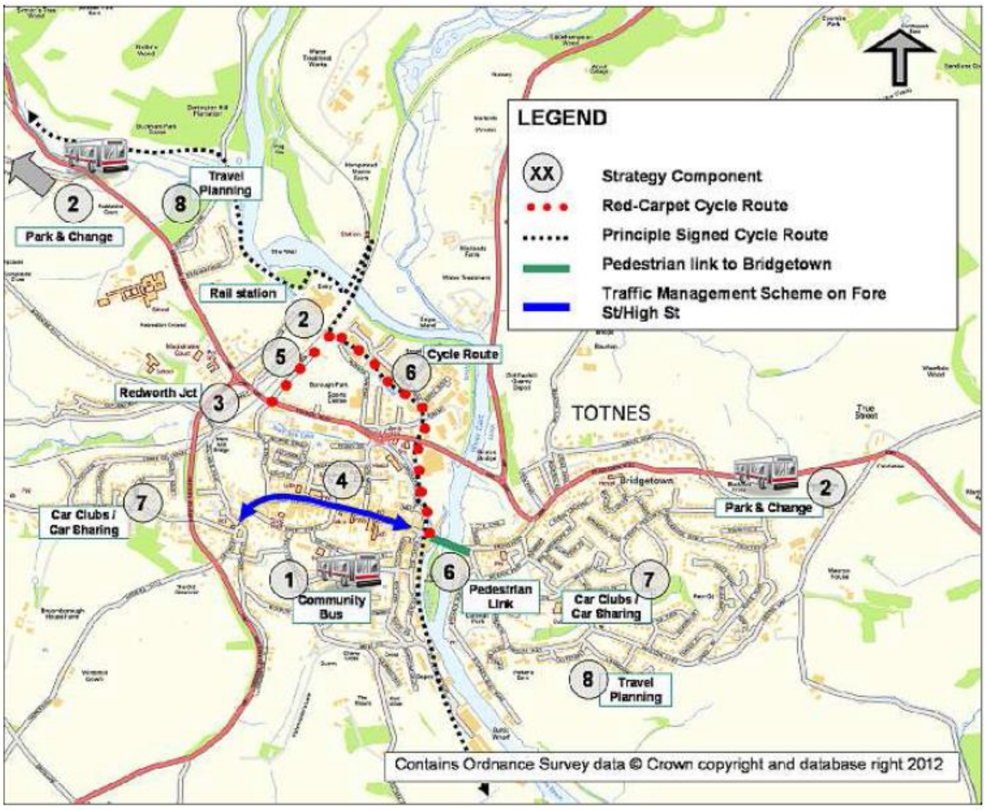
2) Managing Traffic:
- The road network is to function but must share the space with people
- The available capacity in the network is to be maximised.

3) Ensuring that alternative modes for travel are available for all journeys:
- There are to be no barriers to sustainable travel for journeys within, into, out of and through Totnes

2.10 Figure 5 shows the traffic management scheme on Fore Street as part of a package measures included within Devon County Council's Totnes Transport Strategy. The Transport Strategy explains that the implementation of a traffic management scheme responds to the high number of injury collisions involving pedestrians. Survey data collected by the County Council had shown that a high proportion of traffic movements in Fore Street and High Street were illegal. The proposals were expected to reduce the speed of traffic in these streets and make Fore Street and High Street more attractive for cyclists and pedestrians, increasing their share of trips.

2.11 The Transport Strategy explained that the Traffic Order as implemented was introduced on an experimental basis, recognising that other options exist such as shared space which might be incorporated into a longer term Town Centre Scheme.

2.12 Clearly the impact of any transport measure needs to be judged against both the specific objectives set and the broader aims of local transport policy. In this regard it is significant to note that the first objective highlighted in the Devon and Torbay Local Transport Plan is 'to deliver and support new development and economic growth'. The extent to which the ETO is helping achieve this must clearly an important consideration for decision makers, to be weighed alongside safety and environmental factors.



Source: Devon CC, Totnes Transport Strategy Dec 2012
Figure 5 Package of measures included in Totnes Transport Strategy

Economic Importance of the Retail Sector

2.13 Table 1 which is based on information from the 2011 Census shows that the retail sector is the largest source of employment in both Totnes and the wider market area accounting for 18.7% and 15.3% of local employment respectively. The only other sectors which account for more than 10% of employment in either area are health, education or public administration some of which may have been affected by public sector spending restraints.

2.14 Table 2 shows the breakdown of employment amongst residents of Totnes in 2011. While the proportion of the town's residents working in the retail sector is lower than for employment as a whole it still demonstrates that the retail sector is a substantial employer of local people.

Table 1 Sectoral Breakdown of Employment in 2011

Employment - 2011

	Percent of all employees	Totnes	Remainder	Town Area	South Hams	Devon	National
1	Agriculture, forestry & fishing	0.0%	0.6%	0.3%	0.2%	0.3%	0.8%
2	Mining, quarrying & utilities	0.0%	2.0%	1.0%	1.0%	1.7%	1.3%
3	Manufacturing	9.4%	7.3%	8.3%	11.5%	8.4%	8.7%
4	Construction	1.6%	7.8%	4.7%	5.4%	5.7%	4.6%
5	Motor trades	1.1%	1.1%	1.1%	2.4%	2.5%	1.8%
6	Wholesale	1.7%	7.3%	4.5%	4.0%	3.9%	4.1%
7	Retail	18.7%	11.8%	15.3%	13.3%	12.2%	10.2%
8	Transport & storage (inc postal)	2.1%	2.6%	2.4%	4.6%	4.9%	4.6%
9	Accom & food services	6.0%	13.2%	9.6%	11.3%	10.1%	6.8%
10	Information & comms	2.4%	2.4%	2.4%	6.6%	2.8%	3.9%
11	Financial & insurance	1.3%	0.6%	1.0%	0.9%	1.7%	3.9%
12	Property	4.9%	3.0%	4.0%	2.3%	1.6%	1.5%
13	Professional, scientific & technical	4.5%	3.3%	3.9%	4.2%	5.7%	7.3%
14	Business administration & support services	11.5%	5.4%	8.5%	4.8%	5.8%	8.2%
15	Public administration & defence	10.7%	0.6%	5.7%	5.5%	5.3%	5.2%
16	Education	9.6%	11.2%	10.4%	7.6%	9.5%	9.4%
17	Health	11.1%	14.0%	12.5%	9.9%	13.7%	13.2%
18	Arts, entertainment, recreation & other services	3.4%	5.7%	4.5%	4.4%	4.1%	4.5%

Table 2 Sectoral breakdown of employment of residents in 2011

Residents aged 16 to 74 in employment	Totnes	South Hams	Devon
Agriculture, forestry and fishing	5%	3%	3%
Mining and quarrying	0%	0%	0%
Manufacturing	6%	7%	8%
Electricity, gas, steam and air conditioning supply	0%	0%	1%
Water supply; sewerage and waste management	0%	1%	1%
Construction	8%	9%	9%
Wholesale and retail trade; motor vehicle repair	14%	15%	16%
Transport and storage	3%	3%	4%
Accommodation and food service activities	7%	8%	7%
Information and communication	3%	3%	2%
Financial and insurance activities	1%	2%	2%
Real estate activities	2%	2%	2%
Professional, scientific and technical activities	7%	6%	6%
Administrative and support service activities	4%	4%	4%
Public administration and defence;	4%	7%	6%
Education	13%	11%	10%
Human health and social work activities	15%	13%	14%
Other	6%	5%	5%

2.15 Peter Tregenna, an associate lecturer with the Open University states that:

'In 2011 the economy of Totnes, is based on tourism, a number of small and medium enterprises and the fact that it still functions as a significant market town. The local market draws stallholders from a wide area but also from the surrounding villages. There are numerous stalls selling local crafts and produce, often organic, reflecting the green credentials of many residents. The lack of significant local industry and employment opportunities means that many residents now travel to Exeter and Plymouth for work and there are an increasing number of weekly commuters to London.

Over recent decades a number of significant local employers have pulled out of the town which has led to many businesses which were central to the economy of the town such as the Dairy Crest milk processing plant, Reeves Timber yard, Harris' Bacon Factory and Dartington College of Arts ceasing to exist locally. The emphasis now is on the retail sector with a large number of cafes and restaurants, several art galleries and numerous shops reflecting the 'green' values of the local community.

Shops specialising in natural and organic skin care, eco goods and garments, including shoes, as well as organic foods are all to be found in the High Street. Given the impact of the recent recession on the retail sector the town has surprisingly few empty shops possibly because of its successful mixture of businesses serving both the tourist and the local resident.'

2.16 This analysis is reflected in Figure 6 which shows that in 2004 wholesale, retail and hotel and restaurant businesses account for just under 30% of all businesses in the Totnes Market Area. Seen in these terms the retail and associated service sector must be considered strategically important to the Totnes economy.

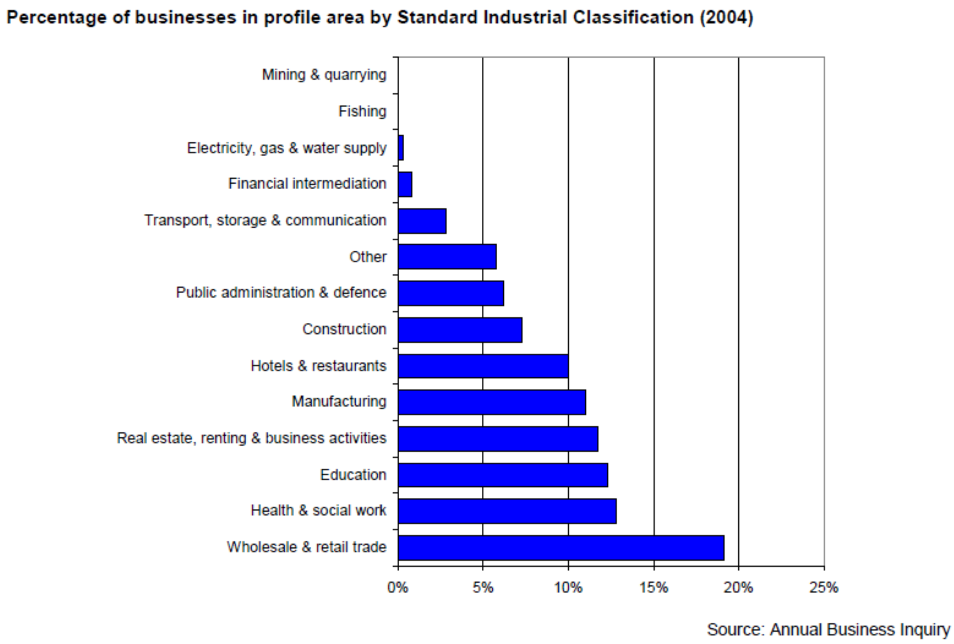


Figure 6 Breakdown of businesses by sector for Totnes Market Town area

2.17 The location of retail and related services in Totnes is strongly focused along the historic Fore Street, High Street and the Narrows (see Figure1). Unlike many other towns, planning policy appears to have inhibited the development of a significant out of town retail offer. In so far as modern retail floorspace has been developed this is in edge-of-centre locations such as the Morrisons store which occupies the site of the former Harris Bacon Factory and has been trading since 1993, the Brutus Shopping Centre which is anchored by the Coop with a clear link to Fore Street, and a small number of retail units fronting Station Road (Majestic Wine, and China Blue).

2.18 Totnes town centre is recognised as having a distinctive 'offer' based upon the historic character of the medieval street layout which enjoys Conservation Area status and is home to many fine listed buildings dating from the Elizabethan era when the town was one of the most prosperous settlements in the South West. Today Totnes is renowned for its rich mix of independent traders as described at para 2.15 above. This is reflected in Figure 7 which is based upon data extracted from Experian's spatially referenced GOAD database. This reveals the wide variety of retail and service businesses located in the town centre. Unlike many town centres these remain predominantly under independent control. It is estimated that just 16% of the businesses identified in the town centre survey are multiples. Over recent years this appears to have helped protect Totnes from the widespread closures which have affected other town centres as major chains have gone into receivership or closed underperforming stores. In January 2013 the town's vacancy rate was reported in the Ivybridge Retail and Leisure Study at 4.8%.

TOTNES: GOAD DATA 2012

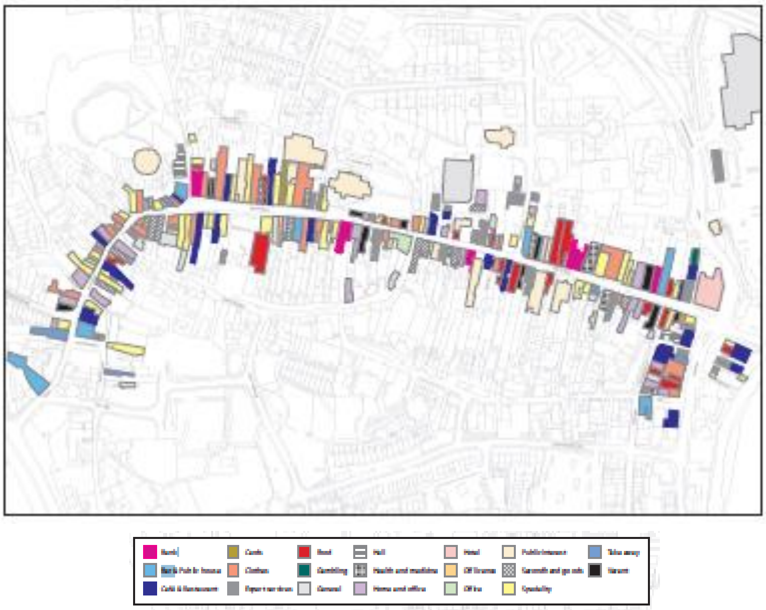


Figure 7 Goad Plan showing diversity of uses in Totnes town centre

National trends in town centre retailing

2.19 It is important to place the results of the research in the light of the wider trends affecting town centre retailing nationally. There is clear evidence of structural change impacting upon patterns of retailing, and in particular town centre retailing. A review of Town Centre retailing undertaken for the Government by Mary Portas in 2012 drew on research commissioned by the Department for Business, Innovation and Skills which sought to understand high street performance. A number of key drivers were seen as having impacted negatively on the performance of town centre businesses. Principal amongst these are:

- external factors such as macro-economic conditions which have led to a squeeze on disposable housing incomes and consumer confidence. Despite this, as Table 3 demonstrates, nationally the value of retail sales have been gradually increasing although it should be noted that the figures include non-store expenditure and vehicle fuel sales.
- spatial and planning factors such as the changing distribution of population coupled with the changes in the physical environment and accessibility related to car access and car parking which has supporting the growth of out of town retailing.

- increasing competition from different channels, most notably from the growth of major supermarket chains, retail warehouse parks, and in recent years the development of e commerce. This is illustrated by Figure 8 which shows that internet sales now account for more than 10% of all retail sales.
- The challenges of effective management of town centres which are characterised by a multiplicity of businesses in different ownership. To a degree this may be addressed by Town Centre Management initiatives and a key recommendation of the Portas review was the establishment of Town Teams.

Table 3 Value of UK Retail Sales - 2012 to 2014

Value of retail sales

annual data and 3-month periods ending in recent months, % change on previous year; seasonally adjusted

	Food Stores	Non-Food Stores					All retailing total (inc vehicle fuel)
		Clothing & Footwear	Household goods	Dept stores	Other	Total	
2012	3.0	1.5	-0.4	6.4	0.6	1.7	**2.4**
2013	3.0	2.6	-3.0	4.1	2.8	1.8	**2.6**
2013 SEP	3.6	2.7	-2.3	3.7	3.7	2.2	**3.5**
OCT	2.8	2.3	-1.5	4.8	4.1	2.6	**3.0**
NOV	2.8	3.6	-1.8	3.4	5.1	2.9	**2.8**
DEC	4.0	4.8	-0.9	6.2	5.2	4.0	**4.0**
2014 JAN	3.5	4.8	2.3	6.6	8.3	5.7	**4.5**

Source: ONS, series: IEAU, IEBJ, IEBM, IEBA, IEAX, J5BY - all retail total includes non-store and vehicle fuel retail

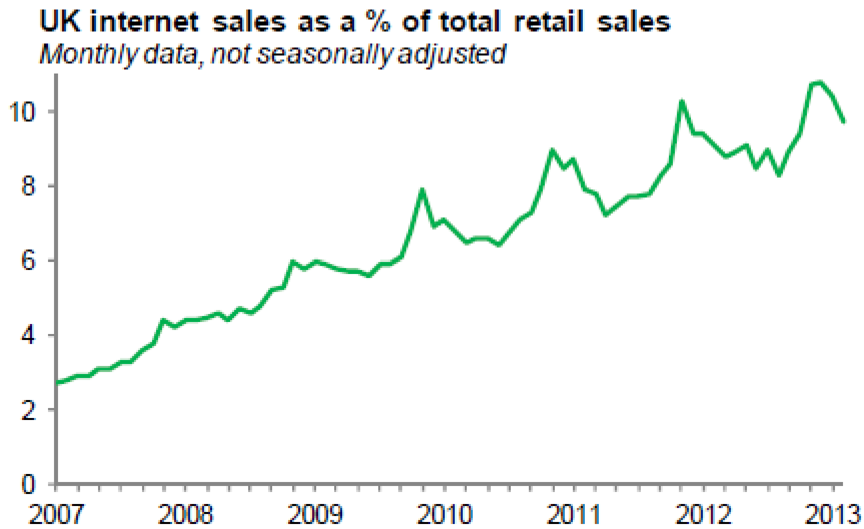
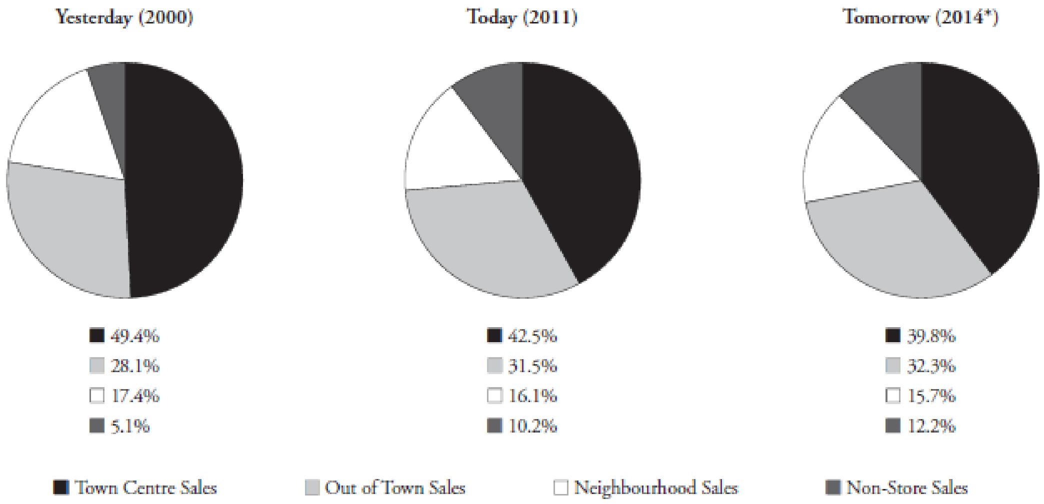


Figure 8 Growth in Internet Sales - 2007 to 2013

2.20 The combination of these factors has resulted in town centres attracting a falling share of total retail spending. As Figure 9, which is drawn from the Portas Review, demonstrates, since 2000 the market share of retail expenditure captured by town centres has fallen by approximately 10% in the face of competition from out of town locations and particularly internet shopping. In contrast the market share accounted for by local neighbourhood centres has remained reasonably stable.



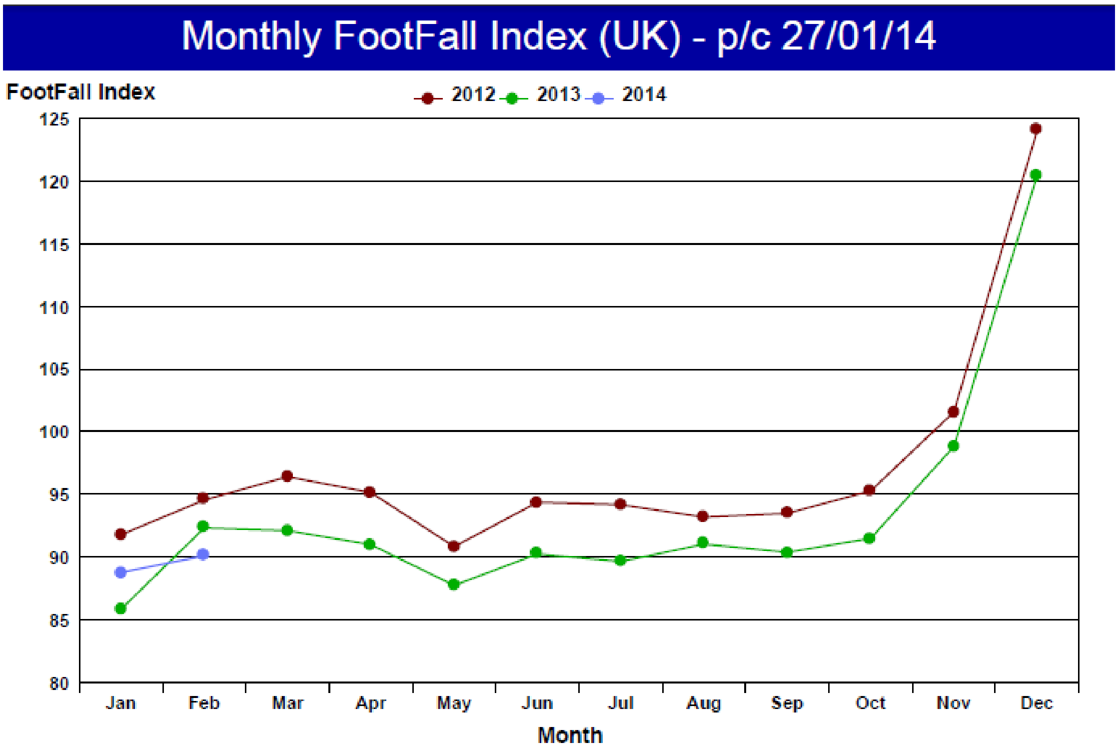
Spending by Location, 2000 vs 2011 vs 2014

*Source: Department for Business, Innovation and Skills/Genecon and Partners (2011) Understanding High Street Performance. Citing Verdict Research (2011) UK Town Centre Retailing and (2010) Out of Town Retailing. *Estimated*

Figure 9 Changing Location of Spending 2000 – 2014

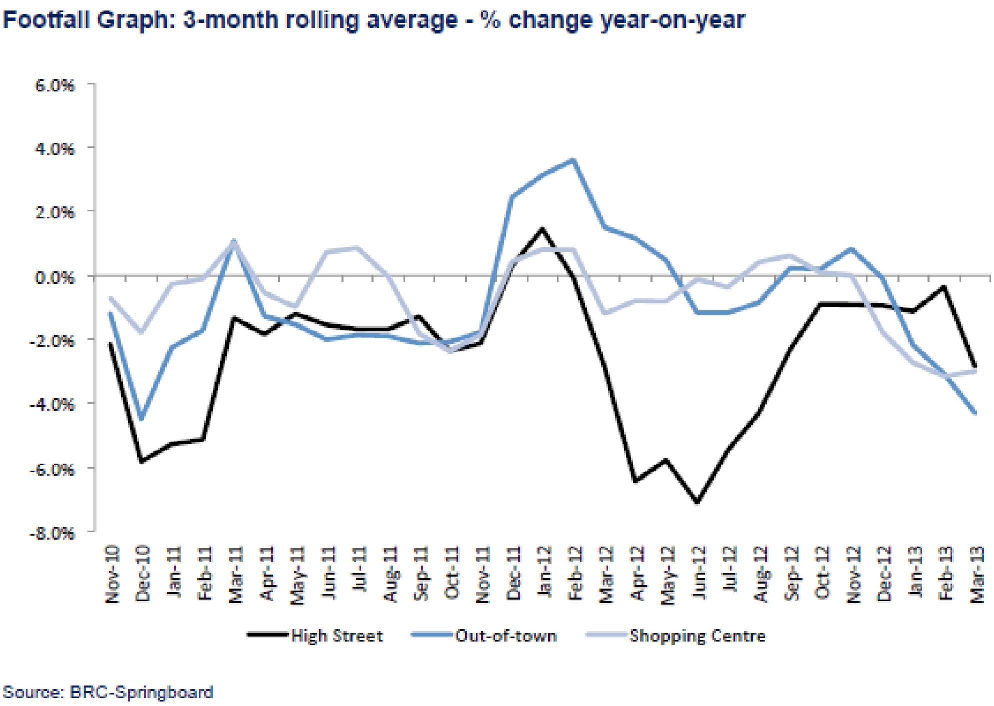
2.21 There is strong evidence however that the loss of market share by town centres has not been uniformly distributed. There has been an observable tendency for larger centres to become more dominant at the expense of middle order town centres, particularly where these are linked to local economies which have suffered disproportionately during the recession or are exposed to growing competition from out of town developments. However smaller centres, such as Totnes appear to have been more resilient, particularly where they have a distinctive offer.

2.22 This general pattern is reinforced by evidence from footfall data (see Figure 10) which reveals that nationally the number of shoppers fell in 2013 and has continued at a depressed level into 2014 although the poor figure for February is reported to be linked to the very wet weather which was experienced throughout the country. Figure 11 provides a breakdown of footfall between High Streets, Shopping Centre and out-of town locations between 2010 and March 2013. This confirms that throughout this period High Streets have generally experienced a greater decline in footfall.



Source: BRC

Figure 10 National footfall trends 2012- 2014



Source BRC - Springboard

Figure 11 Change in footfall between different trading location –Nov 2010 to Mar 2013

2.23 Data from the same source (see Table 4) identifies regional differences in footfall. This reveals that footfall fell in all regions in the UK in the year to March 2013 with the South West experiencing the second largest percentage fall after the East Midlands.

Table 4 Regional change in footfall year to March 2013

Country analysis	Footfall: March 2013	Footfall: Jan - Mar 2013
	% change on year ago	
England		
Greater London	-1.6	1.2
West Midlands	-4.9	-2.3
South East	-4.1	-3.4
South West	-7.0	-2.9
East Midlands	-8.1	-4.9
East	-5.2	-2.7
North & Yorkshire	-6.0	-5.8
Northern Ireland	-4.0	-0.7
Wales	-5.4	-4.4
Scotland	-3.8	-4.3
Weighted UK Average	-5.2	-3.2

Source BRC – Springboard

2.24 In recent years there has been considerable focus on the growth of vacant retail property as evidence of the impact of both recession and structural change in the sector. The Portas review included data on trends in vacancy rates for the period from 2000 to 2012. This showed a significant increase in vacancies at a national level particularly from 2007/2008 onwards as the credit crunch and recession took hold. (see Figure 12).It also highlighted the differences which exist in data from different sources. However the overall national trends are clear.

Retail Vacancy: Proportion of Total Outlets

Source: Department for Business, Innovation and Skills/Genecon and Partners (2011) Understanding High Street Performance. Citing Experian, Oxford Economics/PMA and Colliers International. Note: Colliers International data is for October each year (except for 2011 which relates to April).

Source: Portas Review 2012

Figure 12 Change in retail vacancies nationally from 2000 to 2011

2.25 Recent data reported by the Local Data Company indicates that nationally shop vacancy rates have shown marked improvement towards the end of 2013 falling from a peak of 14.6% in February 2012 to 13.9% in December 2013. However the data point to a growing north – south divide with vacancy rates in the South West (-0.60%), East Midlands (-0.58%), London (-0.44%), West Midlands (-0.31%), Yorkshire & the Humber (-0.12%) and the South East (-0.11%) have all improved whilst the North East (+0.35%), North West (+0.20) and the East of England (+0.04%) have all worsened in 2013.

2.26 In terms of location, the Local Data Company report that at the end of 2013 small towns (<200 units) were in the healthiest state at 9.0% vacancy, which is a 0.2% improvement on 2012. Medium towns (200-400 units) showed an increase in their vacancy average by 0.15% to 11.9% and large towns/cities continue to have the highest overall ‘town’ vacancy rate at 13.4% but have also shown the greatest improvement at -0.33%.

Implications of national trends for Totnes

2.27 The national data suggests that one might expect Totnes to have experienced some reduction in trade and footfall over recent years and for this to have given rise to increased town centre vacancies. However in practice this will depend upon the degree to which the factors identified in para 2.19 have been moderated by local circumstances. While there is no doubt that the residents of South Devon have not escaped the impact of recession in terms of a squeeze on household budgets, Totnes town centre has not been exposed in recent years to immediate competition from out of town retailers offering convenient and free parking, although this is a significant factor in a number of the surrounding centres, such as Newton Abbot, Torquay, Paignton and Plymouth.

2.28 In addition the independent and somewhat ‘quirky’ nature of Totnes’ retail offer is likely to make it somewhat less exposed to competition from internet sales than multiple retailers offering branded products. These factors are likely to explain the town’s apparent resilience as a trading location by comparison with other centres.

Town Centre Health Check Indicators

2.29 An understanding the health and vitality of town centres may be gained through the use of a range of indicators. Ideally these should need to be collected on a consistent basis over a number of years to assess both the absolute and relative performance of town centres. Unfortunately there is no consistent set of data on retailing patterns and trends available locally. With a few exceptions the collection of information on retailing tends to be ad hoc arising largely from evidence gathering in respect of forward planning or in response to specific development proposals.

2.30 For example South Hams District Council commissioned a retail and leisure study of Ivybridge which was published in 2013. This included survey information on shopping patterns relevant to Ivybridge as well as some information on the other centres in the District including Totnes. This is shown in Table 5 and reveals that between 2012 and 2013 Totnes and Kingsbridge improved their position in the widely used Javelin Ranking of town centres whereas Dartmouth, Ivybridge and Salcombe all fell. However the significance of such changes in ranking which is based on a mechanistic scoring of retail attractiveness should not be overstated.

Table 5 Selected indicators for South Hams town centres

Town	Javelin Ranking (Venue Scores) 2012	Javelin Ranking (Venue Scores) 2013	Best retail rent per sq ft	Retail investment yields	Vacancy (Jan 2013)
Dartmouth	1074	1115	£60	6-8%	5.3%
Ivybridge	2196	2428	£21	10%	13%
Kingsbridge	898	833	£30	N/A	-
Salcombe	1875	1907	N/A	N/A	-
Totnes	1029	962	£50	8-9%	4.8%

Source: Ivybridge Retail and Leisure Study 2013 and information on vacancy rates from Devon CC on vacancy rates in Totnes (March 2013) and Dartmouth (September 2013)

2.31 Across the Tamar, Cornwall Council undertakes regular annual assessments of the County's town centres using a variety of health check indicators. The changes in vacancy rates across the county may be seen in Table 6. This highlights both the significant variation which occurs from place to place and the significant changes which can take place over a relatively short period of time. For example, in Wadebridge vacancy rates have increased by around 50% in one year. Such changes are likely to be due to the timing of 'lease events' as well as underlying town centre performance. This points to the need to use a range of indicators in assessing town centres. Action for Market Towns recommend the use of 11 key indicators. These are shown in Table 7 alongside the indicators recommended by Government in the (now withdrawn) PPG 4. This type of information, alongside of the survey set out in the following section, can be used to inform a judgement about the health and vitality of Totnes and the economic impact of the ETO.

Table 6 Vacancy rates of Cornish Towns 2011/12 and 2012/13

Town	Vacancy % 2011/12	Vacancy 2012/13	Number of units 2012/13
Bodmin	10.43	7.7	155
Bude	7.02	7.7	185
Camborne	13.61	14.2	218
Falmouth	8.77	5.7	351
Hayle	7.48	1.9	109
Helston	7.65	11.1	170
Launceston	11.9	10	169
Liskeard	10.88	11.4	167
Newquay	5.48	5.6	284
Penzance	10.53	12.0	368
Redruth	17.68	18.7	198
Saltash	7.89	10.3	116
St Austell	12.12	14.5	220
St Ives	4.53	5.1	314
Truro	7.54	9.3	484
Wadebridge	3.98	5.9	170
CORNWALL	9.12	9.4	-

Source: Cornwall Council

Table 7 Indicators of town centre performance

PPS4 INDICATORS (ANNEX 4)	AMT BENCHMARKING: KEY PERFORMANCE INDICATORS
A1 Diversity of man town centre uses	Total number of commercial units; Comparison/convenience retail split
A2 Amount of floorspace outside centres	
A3 Capacity for growth/change in centres	
A4 Retail representation	Key attractor/multiple trader representation
A5 Shopping rents	Retail rents
A6 Vacancies	Number of vacant units
A7 Commercial yields	Prime retail property yields
A8 Land values and length of time key sites have remained undeveloped	
A9 Pedestrian flows	Footfall counts
A10 Accessibility	Car parking availability and usage
A11 Customer and residents' views and behaviour	Business confidence; Visitor satisfaction; Shoppers' origin
A12 Perception of safety and occurrence of crime	
A13 Town centre environmental quality	

3.0 SURVEY FINDINGS

3.1 The survey research aimed at investigating the economic impact of the ETO comprised two elements:

- A questionnaire survey of shop based businesses located within Totnes town centre;
- A street survey of shoppers/visitors to Totnes town centre.

The approach to design and administration of these surveys is described briefly below.

Business Survey

3.2 The aim of the business questionnaire has been to obtain hard evidence of business performance to allow an assessment to be made of the possible impact of the ETO. To achieve this a questionnaire was designed to collect systematic information which provides the basis for both quantitative and qualitative analysis. The questionnaire was piloted with a small number of businesses forming part of TTAG to ensure that as far as possible it was both 'user friendly' and realistic in terms of the information sought. A key concern arising in relation to any survey of this nature is the confidentiality of the information provided. In an attempt to allay potential fears a letter was prepared to accompany the questionnaire provide assurances about both the handling and storage of the data and its use in order to preserve strict confidentiality.

3.3 The questionnaire was delivered by hand over a two day period during the week commencing 10th February with a deadline of 3rd March for return by Freepost (with which there were some problems resulting in the non-arrival of a number of promised responses.. During distribution a number of businesses indicated that they felt that they would be unable to provide relevant information or simply did not wish to take part in the survey. A total of 160 questionnaires were delivered and in the following week an email was sent to businesses for whom addresses were available to prompt them about the survey and offer electronic versions of the questionnaire. This offer was taken up by a small number of businesses.

3.4 In the week prior to the stated deadline a letter reminding businesses about the survey was circulated. The deadline was subsequently extended (as was always planned) by a further week. In the event further chasing and cajoling continued to maximise the response rate. The results of these efforts can be seen in Table 8 which shows the sample size which was achieved based on the total observed population of town centre businesses.

Table 8 Business survey sampling rate

	Occupied business premises (excluding multiples)	Occupied retail business premises (excluding multiples)	Occupied service business premises (excluding multiples)	Total response rate % (excluding multiples)	Response rate with data on finance % (excluding multiples)	Response rate without data on finance % (excluding multiples)	Response rate from retail business premises (excluding multiples)	Response rate from service business premises (excluding multiples)
Narrows	53 (51)	37 (35)	16 (16)	39.6 (41.2)	28.3 (29.4)	13.2 (13.7)	40.5 (42.9)	37.5 (37.5)
Market	50 (46)	36 (33)	14 (13)	32.0 (34.8)	18.0 (19.6)	14.0 (15.2)	41.7 (45.4)	7.1 (7.7)
Arch	43 (34)	25 (20)	18 (14)	20.9 (26.5)	16.3 (20.6)	4.6 (5.9)	28.0 (35.0)	11.1 (14.3)
Fore St	45 (30)	27 (16)	18 (14)	28.9 (43.3)	17.8 (26.7)	11.1 (16.7)	37.0 (62.5)	16.6 (21.4)
Plains	27 (22)	10 (8)	17 (14)	18.5 (22.7)	11.1 (13.6)	7.4 (9.1)	40.0 (50.0)	5.9 (7.1)
Total	218 (183)	135 (112)	83 (71)	29.4 (35.0)	19.3 (23.0)	10.1 (12.0)	37.7 (45.5)	15.7 (18.3)

3.5 From the outset it was estimated that the survey would produce a response from between 50 and 100 businesses. In the event some 64 questionnaires representing a 29.4% sample of town centre businesses targeted by the research were received. In practice the actual response rate was somewhat higher given that an estimated 160 questionnaires were distributed, representing an actual response rate of around 40%. This falls within the expected range for a survey of the complexity and sensitivity involved and provides a reasonable basis for investigating the impact of the ETO

3.6 Not all of the responses received provided financial information and where they did this was not always in the form requested of over a longer enough time period to allow incorporation into the full analysis. A total of 42 responses contained financial information representing a sample of 19.3% of town centre businesses. This lower number should not be of surprise given that it is the policy of most multiple retailers not to divulge financial information, and it was clear from some of the responses or reasons given for not returning the questionnaire that many businesses feel uncomfortable about providing trading information to third parties.

3.7 Questionnaire responses have been analysed in terms of sub areas of the town centre in order to identify whether the ETO has had a differential impact. The largest sample has been obtained from businesses in the Narrows, followed by those clustered around the Market Square area. There was also an average response rate from businesses on Fore Street, although when multiple businesses are excluded from consideration the response of independent businesses in this part of town was significantly higher. Weaker response rates were obtained from the section of the town around the Arch and on the Plains/Coronation Road. Generally however the data obtained showed a reasonably consistent pattern which increases confidence in the results obtained.

3.8 As Table 8 also reveals there was a significantly higher response from retail businesses in comparison with service based businesses.

3.9 Overall the response rate achieved was broadly in line with expectations and offers a reasonable basis for investigating the possible effects of the ETO on the trading performance of businesses throughout the town centre – enabling both quantitative and qualitative analysis. While a higher response rate is always preferable, the survey at least provides a systematic and evidential basis for exploring this important issue.

Shopper/Visitor Survey

3.10 Enlisting the support of undergraduate students, a street survey was undertaken to provide information regarding trips to Totnes town centreThe survey was undertaken over 5 days at the end of February and early March. The days selected included Tuesday, Thursday, Friday (x2) and Saturday. The instruction to the surveyors was to undertake the interviews at locations throughout the town centre and to achieve a reasonable cross section of interviewees by gender and age.

3.10 The aim of the survey was to provide an understanding of the origin and motivations of visitors to the town centre, the other places they shop, their assessment of the factors influencing their decision to visit to Totnes and whether or not they are aware of the ETO and if so has it influenced their behaviour. A total of 186 visitors were surveyed over the 5 days providing a rich source of largely qualitative information for analysis.

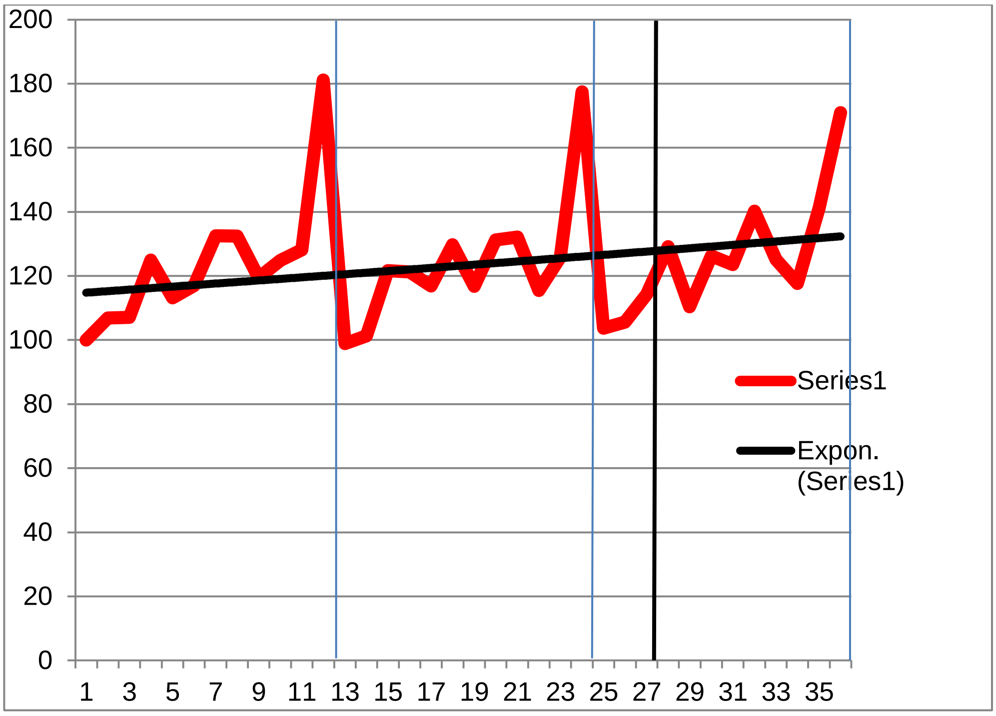
3.10 It should be stressed that as designed and executed the shopper survey cannot be considered to provide a representative sample of responses as no quota was set. Indeed a street survey of this nature introduced significant bias to the results as it cannot include individuals who the ETO might be deterring from visiting Totnes at all. To survey such individuals a full household survey would be required which was not possible with the resources and timescale available for this piece of research.

Business Survey Findings

3.11 Figure 13 shows the results of the analysis of all town centre businesses that provided detailed information on monthly revenues received since January 2011 which was the date when the increase in VAT from 17.5% to 20% came into force. The period covered by the data runs to the end of 2013 – representing 36 months. The data clearly shows the peaks and troughs in the town's trading year focusing on Easter, the summer holidays and Christmas with January and February appearing as low months.

3.12 Figure 13 also shows the trendline in the data using an exponential function. While this reveals an upwards trend, which is largely due to the first observation being in the low month of January and the final observation in the high month of December, the data highlights falling Christmas revenues over the three years, and a greater number of below trend observations in 2013 (4 in 2011, 5 in 2012 and 7 in 2013). Indeed the graph shows that the first half of 2013 was a prolonged period of sub trend trading. This coincided with road closures for gas main replacement works (January to March 2013) and the introduction of the ETO from April 2013 onwards.

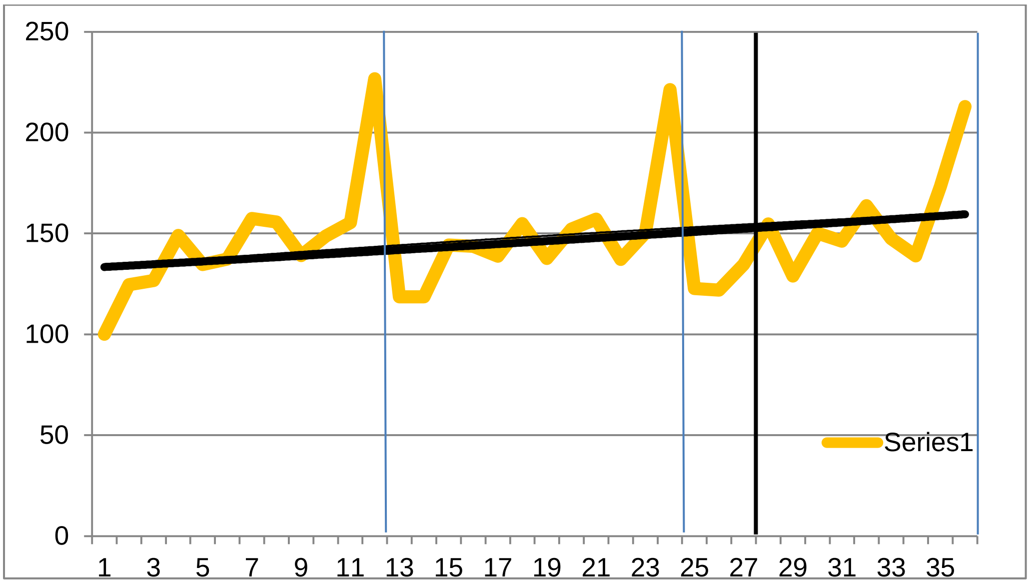
Figure 13 Analysis of Totnes Town Centre Business Revenue* (Jan 2011 to Dec 2013)



***** Indexed to 100 at January 2011

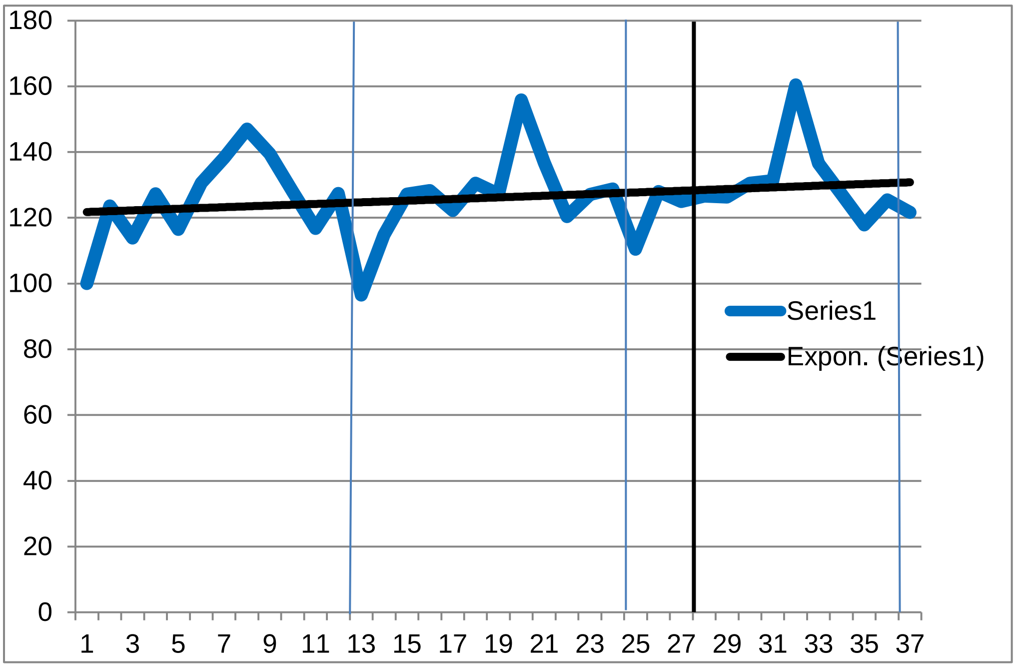
3.13 Figures 14 and 15 explore the comparative revenue performance of retail and service businesses. This reveals, unsurprisingly that retail businesses are more heavily dependent on seasonal trading, particularly at Christmas while service businesses are less cyclical in nature although in Totnes they do appear to benefit from trade during both Easter and Summer holiday periods.

Figure 14 Analysis of Totnes Town Centre Retail Business Revenue* (Jan 2011 to Dec 2013)



***** Indexed to 100 at January 2011*****

Figure 15 Analysis of Totnes Town Centre Service Business Revenue* (Jan 2011 to Jan 2014)



***** Indexed to 100 at January 2011*****

3.14 The information in Figures 13, 14 and 15 involves an aggregate view of trading performance at the level of the town centre as a whole. At its best this suggests that the town is ‘flatlining’ and there is some evidence of business finding it harder to attract revenues with declining Christmas trade and a prolonged period of subdued performance coinciding with changes to traffic flows along Fore Street and High Street.

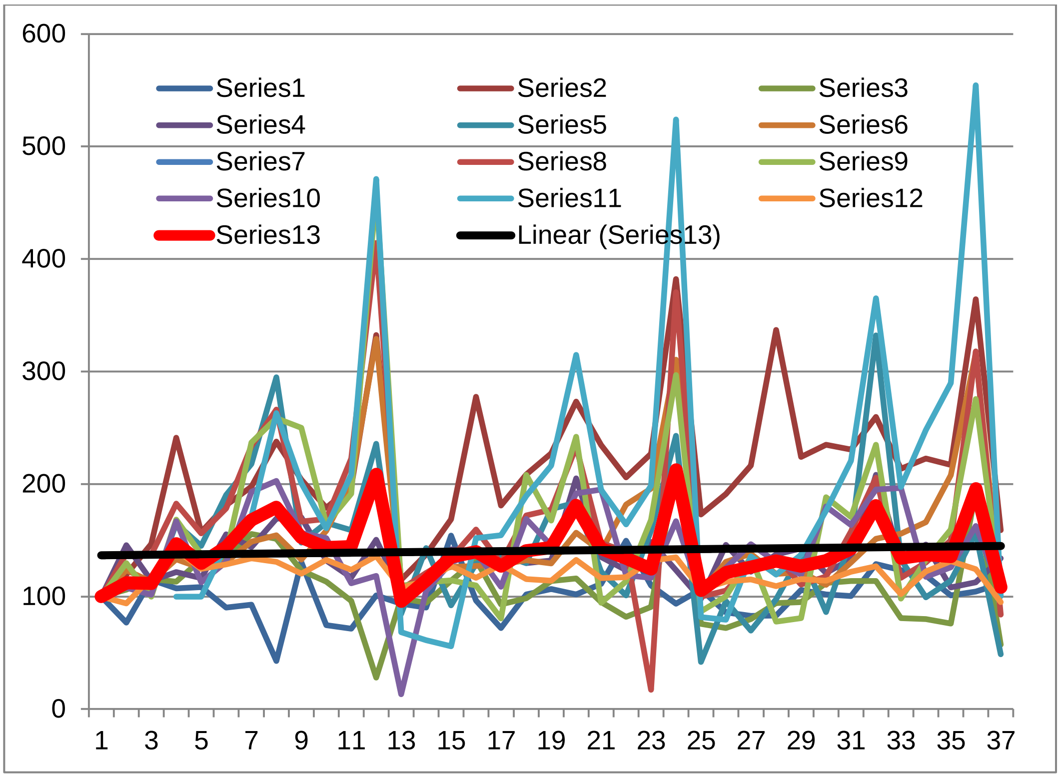
3.15 Within any aggregate set of numbers there are inevitably significant variations. This is revealed by the analysis of data from businesses located in individual sections of the town. These have been defined as:

- the Narrows covering that part of the town centre running from Castle Street to Plymouth Road and beyond including the Rotherforld;
- the Market area covering the businesses in Castle Street, the Market Square and the section of High Street running down to St Mary’s Church;
- the Arch covering the section of Fore Street and High Street between Station Road and St Mary’s Church;
- Fore Street covering the section from Station Road to the Plains Roundabout including the alleyway alongside the Royal Seven Stars Hotel; and
- The Plains including Morrisons supermarket and Ticklemore Street.

3.16 Figure 16 shows the data collected for businesses trading from the Narrows. The aggregate performance for businesses in the Narrows broadly follows that for the town as a whole. However there is a high degree of variability observable between individual businesses with some businesses growing revenues throughout the period while others are clearly struggling. In January 2014 some 45% were achieving sales below those achieved in January 2011, 9% were broadly the same and 56% had increased sales albeit in only one case had sales increased by more than 10% over a three year period.

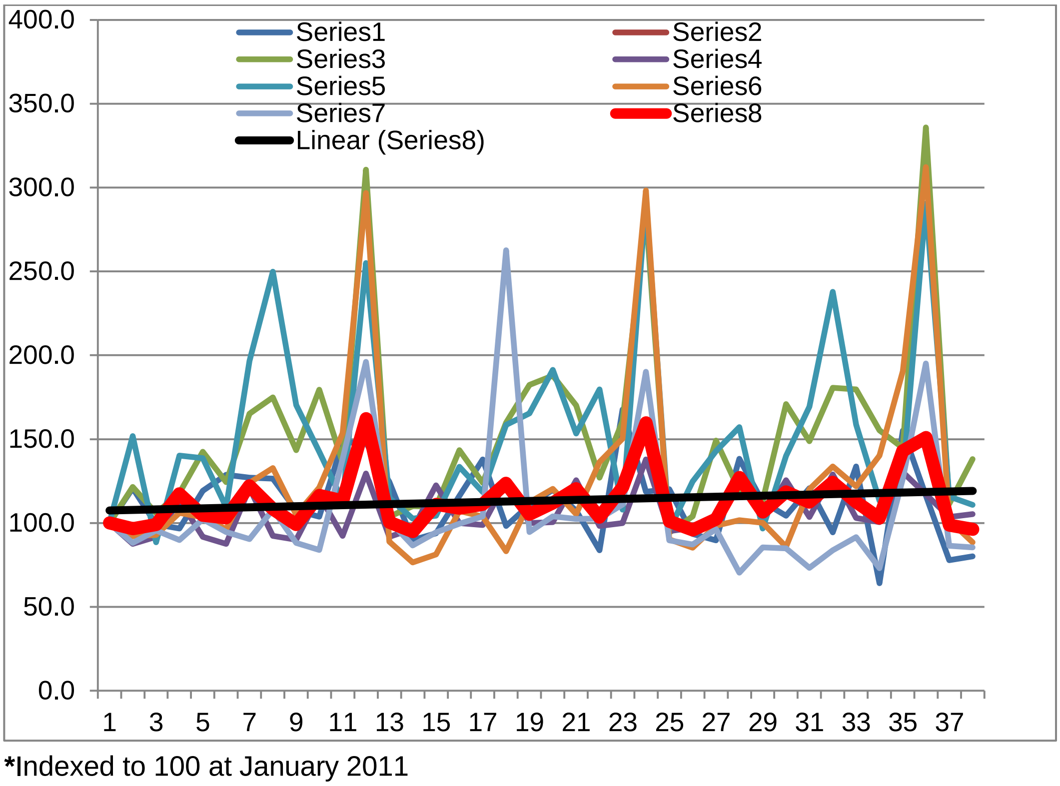
3.17 Figure 17 shows the data collected for businesses trading from the Market Square area of the town centre. The prolonged period of sub trend trading in the first half of 2013 does not appear to have occurred in this part of town. However there is significant variability between businesses with 50% of businesses reporting sales down over the period from January 2011 and 50% increasing sales.

Figure 16 Analysis of Business Revenue in the Narrows* (Jan 2011- Jan 2014)



***** Indexed to 100 at January 2011

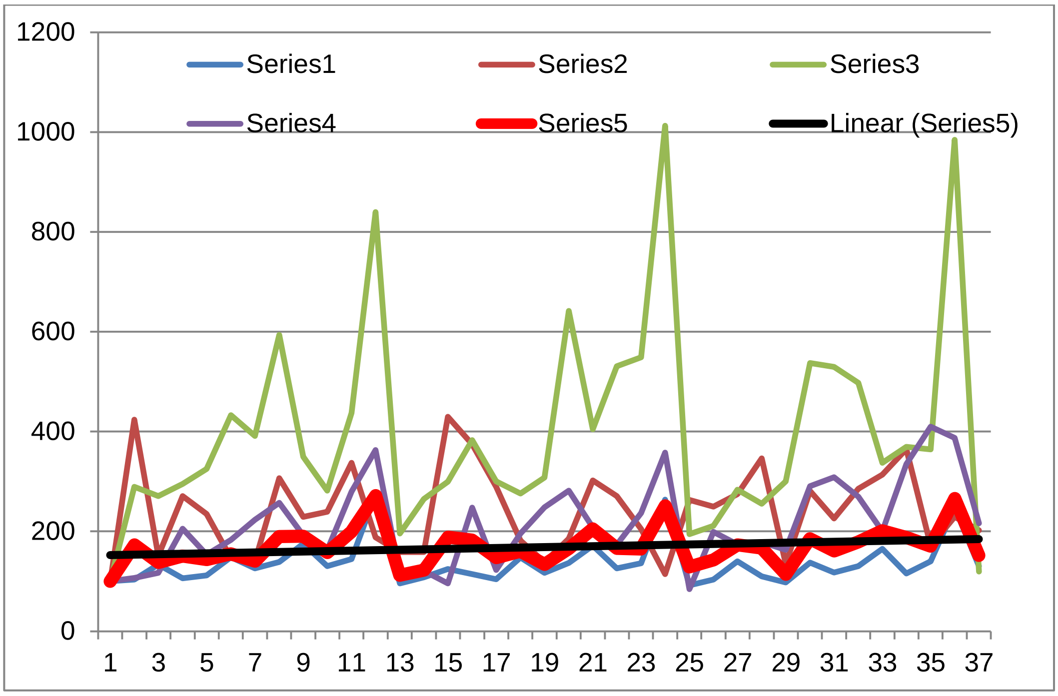
Figure 17 Analysis of Business Revenue in the Market Area* (Jan 2011- Feb 2014)



*****Indexed to 100 at January 2011

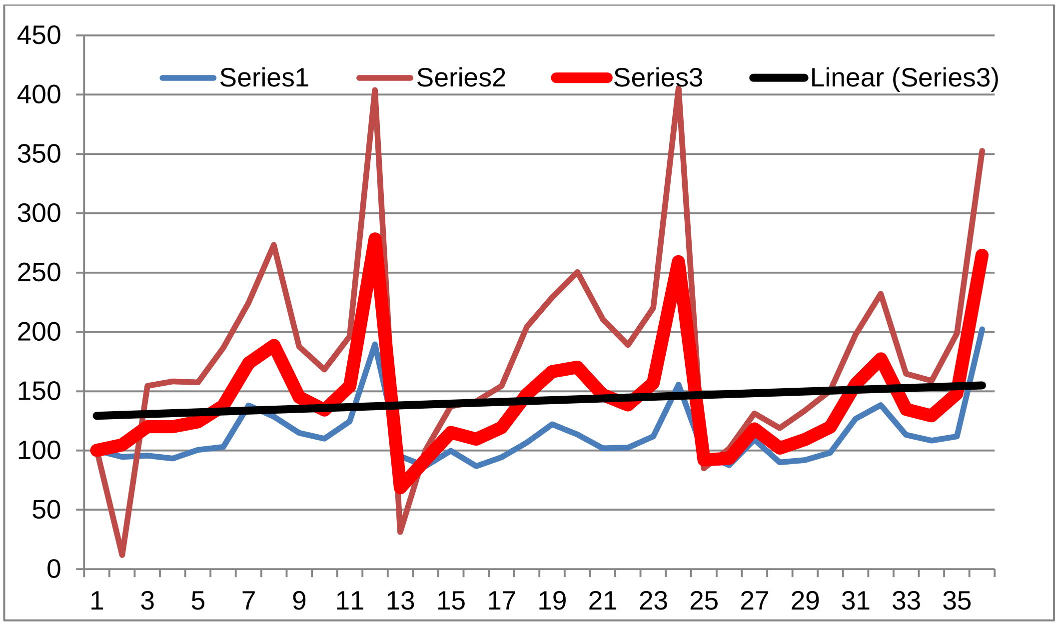
3.18 Figures 18 and 19 present the results of the survey for the Arch and Fore Street respectively. In both cases here are less observations available than for other parts of the town centre. Despite this the same general pattern of trading may be seen although more of the businesses reporting in the Arch have seen revenuesincreasing over the three year period under investigation. For businesses reporting from Fore Street there is a clearer divergence of fortunes.

Figure 18 Analysis of Business Revenue in the Arch * (Jan 2011- Jan 2014)



*Indexed to 100 at January 2011

Figure 19 Analysis of Business Revenue in Fore Street* (Jan 2011- Dec 2013)



***Indexed to 100 at January 2011**

3.19 For the relatively small number of businesses in the Plains area directly comparable data over the full 3 year period sought was not obtained and therefore the type of analysis set out above is not possible. Indeed a number of businesses responding were unable to provide the detailed month-by-month data sought. However a significant number provided summary financial data on the changing revenues generated by their businesses focusing largely on the period before and after the introduction of the ETO.

3.20 Table 9 summarises information on monthly sales performance from April to December 2013 against the same period in 2012. This covers the period during which the ETO has been in operation. Comparing January and February 2014 with the same months in 2013 is unlikely to be reliable because on the presence of the gas main replacement works which closed High Street completely. Once again the data shows some significant variation with some very large fluctuation in sales. Detailed examination of the data indicates that this largely affects smaller stores selling larger ticket items such as galleries.

3.21 If one focuses on the pattern of stores reporting monthly changes in the +/- 20% range the proportion of stores reporting data apart from June and July that the majority of months show both more business reporting a fall in sales and generally higher at higher percentages.

Table 9 % of businesses reporting monthly change in sales April 2013 to Dec 2013

	30-%	**-20 to 30%**	**-15 to 20%**	**-10 to 15%**	**-5 to 10%**	**0 to -5%**	**0 to +5%**	**+5 to 10%**	**+10 to 15%**	**+5to 20%**	**+20 to 30%**	**30+%**
Apr-13	12	20	12	8	24	12	12	8	4	8	12	4
May-13	10	0	10	13	16.7	6.7	20	3.3	0	3.3	6.7	10
Jun-13	0	9.1	6.1	15.1	15.1	3	27.3	9.1	3	3	0	9.1
Jul-13	0	0	5.9	20.1	8.8	2.9	32.3	8.8	2.9	2.9	0	14.7
Aug-13	0	2.6	7.9	10.5	2.6	23.7	5.3	2.6	5.5	2.6	23.7	7.9
Sep-13	0	8.8	8.8	14.7	8.8	14.7	14.7	11.8	8.8	2.9	2.9	2.9
Oct-13	5.7	8.6	2.9	8.6	14.3	8.6	17.1	8.6	2.9	5.7	2.9	14.3
Nov-13	5.7	8.6	8.6	2.9	14.3	14.3	8.6	8.6	2.9	0	2.9	22.8
Dec-13	5.5	0	5.5	11.1	22.2	22.2	8.3	5.5	2.8	2.8	2.8	8.3

3.22 Faced with such challenging trading conditions it is clear from the survey responses that businesses are seeking to adjust how they run their operations. The most commonly cited responses were as follows:

- **Changing product and service offering**

47% of respondents indicated action to improve the appeal of the goods and services that they offer to customers in an attempt to convert a declining footfall into profitable sales. Examples mentioned are included in the text box below:

Product mix and price point altered; more electrical work not based in shop; started selling new lines; reduced space for fiction because of Kindles and e-books; constantly reviewed; fewer big ticket items; always evolving; wider product range; constantly changing toot meet demand; sourcing products direct from producers to combat online retailing; more variety; cheaper alternatives; reducing brands that are most heavily discounted by e-tailers; increased range; new products; making more products myself; taking bigger premises; enhanced after sales service to increase customer loyalty and confidence in contrast to internet competitors

- **Stock adjustments**

41% of businesses indicated that they have adjusted their stock levels. The majority of these refer to reducing stock although a number have increased stock levels in response to increased demand. Examples of how the businesses are responding in this area are set out in the text box below.

Decreased amount of stock; reduced stock as cannot afford to carry so much; decreased TV stock; decreased in line with falling turnover; holding less stock; increased offer; adjust stock levels daily; increase some stock and decrease other; hold less stock; increased stock; decreased bread purchases

- **Changes in staffing levels**

36% of businesses responding indicated that they have adjusted staffing levels. Principally this has involved reductions in temporary or part time staff although a minority have increased the level of employment. The range of changes is described in the following text box.

Decreased by 0.25 FTE; cutback on staff by 50%; 1 extra staff member; decreased by 8 hours per week; stopped employing someone for days off; decreased by 1 FTE; decreased staff hours; now work on own; made part timer redundant; decrease of 10%; have reduced staff numbers; increase; reduced by 40 hours per week

- **Opening hours**

33% of businesses indicated that they have adjusted their trading hours. This includes either reducing or fine tuning opening times as exemplified by the following comments.

> Slightly reduced due to family constraints; Opening later to 18-30 (free parking after 18-00); longer hours on 4 days rather than opening 5 days; reduced on Sunday; Opening on Good Food Sundays; adjusting to seasonal opening and opening on Totnes Market Sundays; open more Sundays –reduced Monday to Saturdays; reduced –no customers early on; Opening 2 days only in February; reduced in winter months; increased over Christmas; extended to 6pm.

- **Increased sales and promotions**

30% of businesses mentioned that they are working harder to achieve sales through increased sales and promotions with consequential impact on profitability. Examples of this are set out in the following text box.

> Discounting donated charity goods; price promotions; promotions throughout year; reductions for 2 days; loyalty card; heavily discounted stock in January; continually having sales and reducing profit margins; more special offers; more promotions and lower margins; have to discount more and have more special offers; increased and more frequent e.g. flash sales;

- **Expenditure on advertising and marketing**

23% of businesses indicated that they have adjusted expenditure of sales and marketing. A significant proportion indicated that they have reduced or eliminated expenditure in this area in order to save costs while others are investing in this area to try to drive sales. The range of responses is shown in the following text box.

> Month long radio advertising; increased marketing activity to draw shoppers from Plymouth and Torbay through advert in Western Morning News; spending more on advertising than usual; stopped completely; more leaflet drops; less newspaper ads; increased spend; use of A boards; increased mail and telephone contact

Nearly 10% of respondents also reported growing use of social media and websites.

- **Injecting working capital**

17% of respondents reported that they have injected additional working capital into their businesses. In a small number of cases businesses have do ne this to increase stock and support growth; however the majority of comments indicate that businesses are responding to a need to support cash flow as illustrated by the following comments

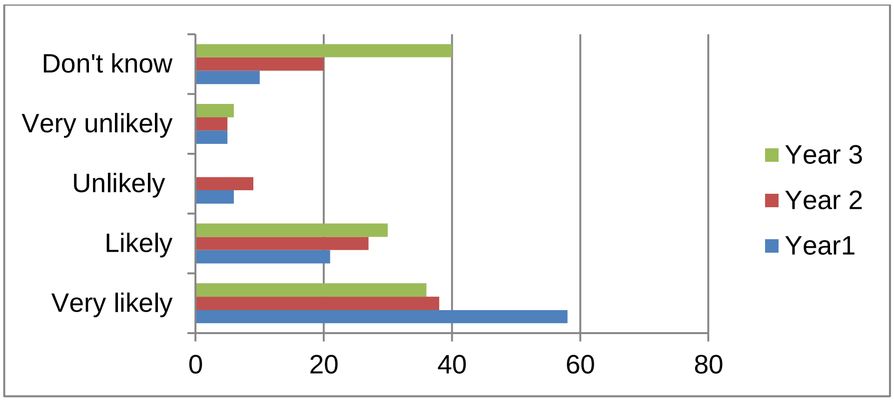
> Using credit card for new stock; additional working capital injected to finance increased stocks; have injected £4,500 into business since October 2013; Used savings intended to pay for mortgage to increase stock; yes from mortgages; put £4,000 of savings into business; yes from personal savings; using personal account to keep afloat; injected capital from my mortgage but cannot carry on doing this long term

- **Other actions**

Businesses report a range of other responses to the challenging trading conditions which Totnes town centre is facing. These include requesting a rent reduction from their landlord, moving to monthly rather than quarterly rental payments and in some cases rescheduling or missing payment deadlines. One business has indicated that it has put its plans for further investment on hold until trading conditions pending the outcome of the ETO due to its impact on business in the town centre.

3.21 A measure of the confidence which businesses have in the future may be found in the responses to a question probing how likely businesses feel they will be trading over the next three years. The results are shown in Figure 20.

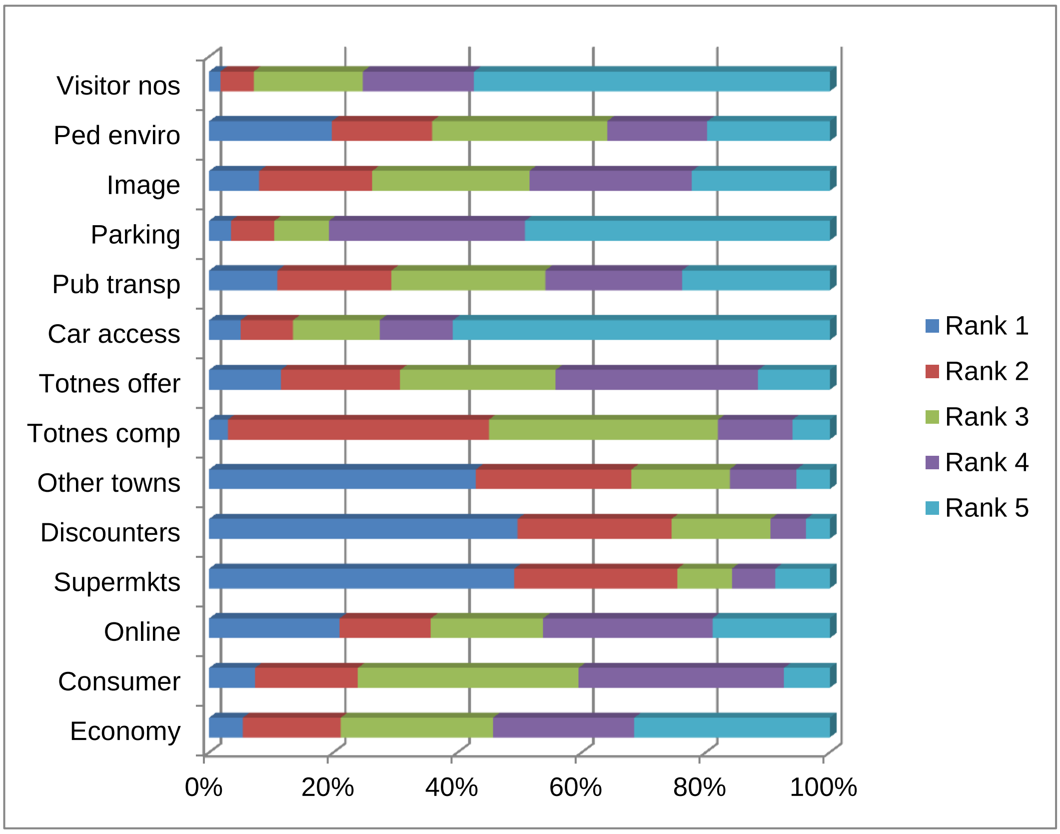
Figure 20 Confidence amongst business respondents about their future trading from Totnes town centre



3.22 The findings suggest that the town has a strong core of two thirds to three quarters of businesses who are confident about remaining in the town centre over the next one to three years. It is evident that those businesses who own their own premises are markedly more confident about their ability to survive into the future. In contrast some 10 to 15% of respondents believe that it is unlikely or very unlikely that they will continue in business. Not surprisingly however uncertainly increases the further one looks in the future as reflected in the 'don't know' responses.

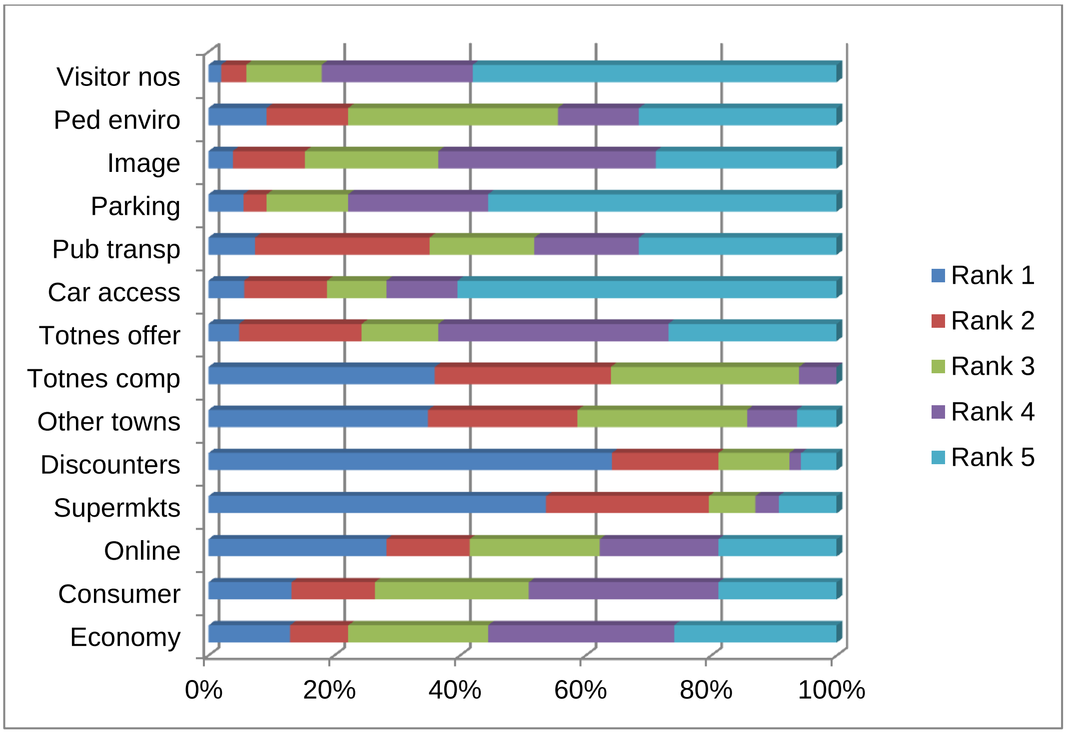
3.23 Figures 21 and 22 show the significant which business attach to the factors which they feel have influenced their trading performance over the last 1 and 3 years. The responses invited business to rate the significance of a range of factors from 1 (little influence) to 5 (major influence). Over the past three years the factors considered to have been of greatest influence are: the availability and cost of parking; visitor numbers and footfall; accessibility to Totnes by car; the impact of the economy on consumer spending and the image and marketing of Totnes town centre.

Figure 21 Business opinions on the significance of factors influencing their trading performance over the past 3 years



3.24 The five factors which are felt to have had the greatest influence over the last 12 months are: visitor numbers and footfall; the availability and cost of parking; accessibility to Totnes by car; the impact of the economy on overall consumer spending; and image and marketing of Totnes town centre. While the same factors are highlighted as being most important over both periods, it is interesting to note that the issue of footfall is seen as more significant over the past 12 months. From many of the responses received it is clear that the businesses see a close link between the introduction of the ETO and footfall in the town centre.

Figure 22 Business opinions on the significance of factors influencing their trading performance over the past 12 months



3.25 Table 10 sets out the specific quantitative evidence provided by traders in relation to the reduction of footfall following the introduction of the ETO. A full listing of the comments received from traders in response to questions 17 and 18 in the survey as well as other comments on the survey can be found at Appendix C. While the majority of these express concern about the impact of the ETO on their business and the `town generally, there are a number of businesses who support the changes which have been made and the resultant improvement in the pedestrian environment, particularly in the Narrows.

Table 10 Quantified information from businesses on changes in footfall following the introduction of the ETO

Quantified information on footfall numbers
Footfall is down by 50% - customers spend less time due to parking restrictions
Number of customers are 14% down
Footfall is down 20% and frequency of visit is down by a quarter.
Footfall counters show negative impact. Local customers only - people from further afield are made to feel unwelcome by signage and are unaware of how to get onto High Street.
Numbers of paying customers down on average 7%. We used to have 20 customers a day park on double yellow lines to pop into shop. Now we have an average of 2.
Footfall is down 10% - fewer visitors therefore it is now mostly local trade from people living or working in Totnes
2011 - 16,369 transactions at average of £7.02, 2012 16,364 – transactions at average of £7.01 and 2013 - 15,748 transactions at average of £7.28 (largely due to inflation). This demonstrates the reduction in footfall.
Since the ETO as an average we have had a reduction of 20 credit card transactions a week. Our appointment book indicates a trend of people coming less frequently since access is now less convenient to Fore Street.
Footfall data (number of sales) 2010 – 27,272, 2011 – 26,712, 2012 – 25029, 2013 26,772.
Compared to other market towns in the area we are trading -10% versus their +12%.
There was a 13% reduction in takings over first three months of the ETO but in the autumn we saw a 33% increase in takings. We saw this as teething problems due to poor signage and jams but the Narrows feels calmer and pedestrians feel safer.
Our monthly figures are affected by weather and the timing of Easter. However having bumped along (what we thought was the bottom) for 2009, 2010, 2011 and 2012, the road closure has meant our numbers have slipped by up to 10% for 2013/14.

3.26 The comments made by businesses highlight the concern about the impact which the ETO and parking provision is having on the behaviour of visitors to the town centre. These include:

- The difficulty which face shoppers in making quick visits to the shops on Fore Street and High Street by car - frequently referred to as ‘pop and shop’
- The choice which the ETO requires car borne shoppers to make between turning down Fore Street or up the High Street. This is seen as inhibiting shopping along the length of Totnes’ High Street.

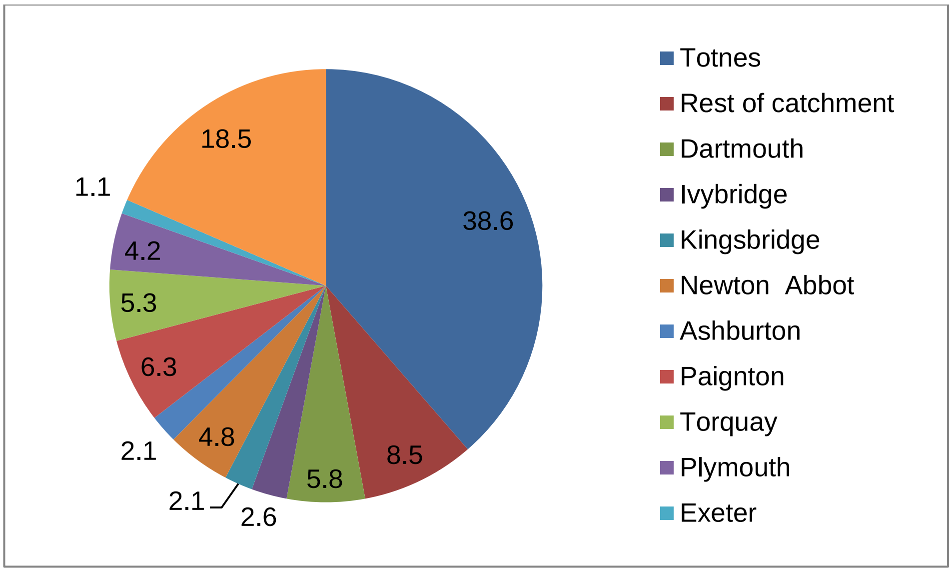
- Confusion and uncertainty about how to access the High Street compounded by poor signage and legibility.
- Reduction in the number, frequency and duration of visits into the town centre, particularly from Totnes' wider catchment.
- Extra time and cost associated with deliveries.
- Loss of trade to surrounding centres which are more convenient to access

Shopper Survey Findings

3.27 The shopper survey sought to establish the pattern of visitors to the town centre. The origin of those surveyed is shown in Figure 23. This shows that 38.6% were from the town itself. However just 8.5% were from the surrounding catchment which includes villages such as Berry Pomeroy and Dartington. While the data collection method means that this figure is not statistically reliable it does tend to support the view expressed by a number of the businesses that there are less visits to the town centre from the villages surrounding Totnes which account for nearly two thirds of the town's natural catchment.

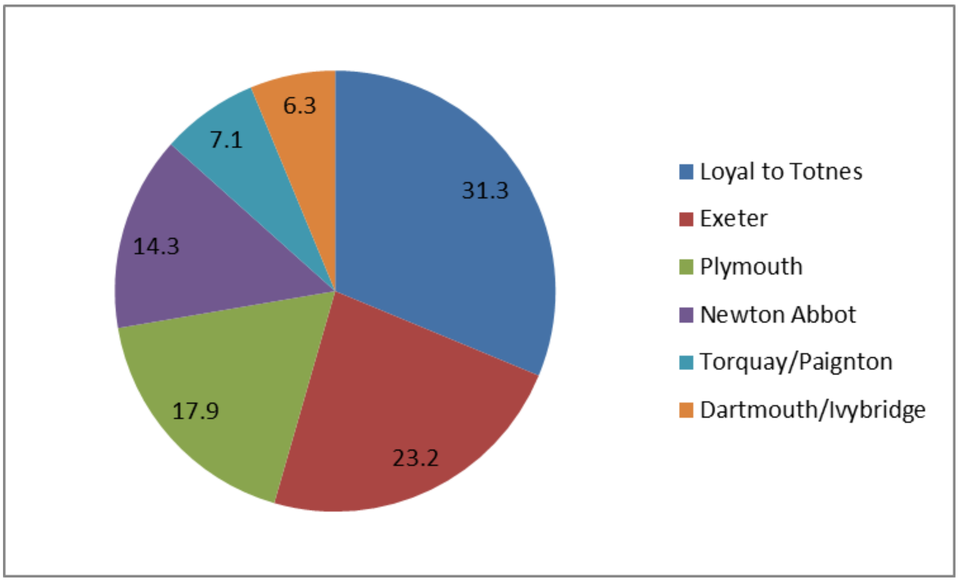
3.28 The next largest category of visitors surveyed was tourists and day trippers who comprised 18.5% of the sample even at the end of February and early March. This highlights the importance of this component of the town's trade. To a degree this may also be seen in the proportion of visitors from the surrounding towns of Torquay (5.3%) and Paignton (6.3%), Newton Abbot (4.8%) and Plymouth (4.2%). A key motivation of visitors appears to be to visit Totnes town centre for its atmosphere and range of independent shops and cafes.

Figure 23 Origin of visitors to Totnes town centre from street survey



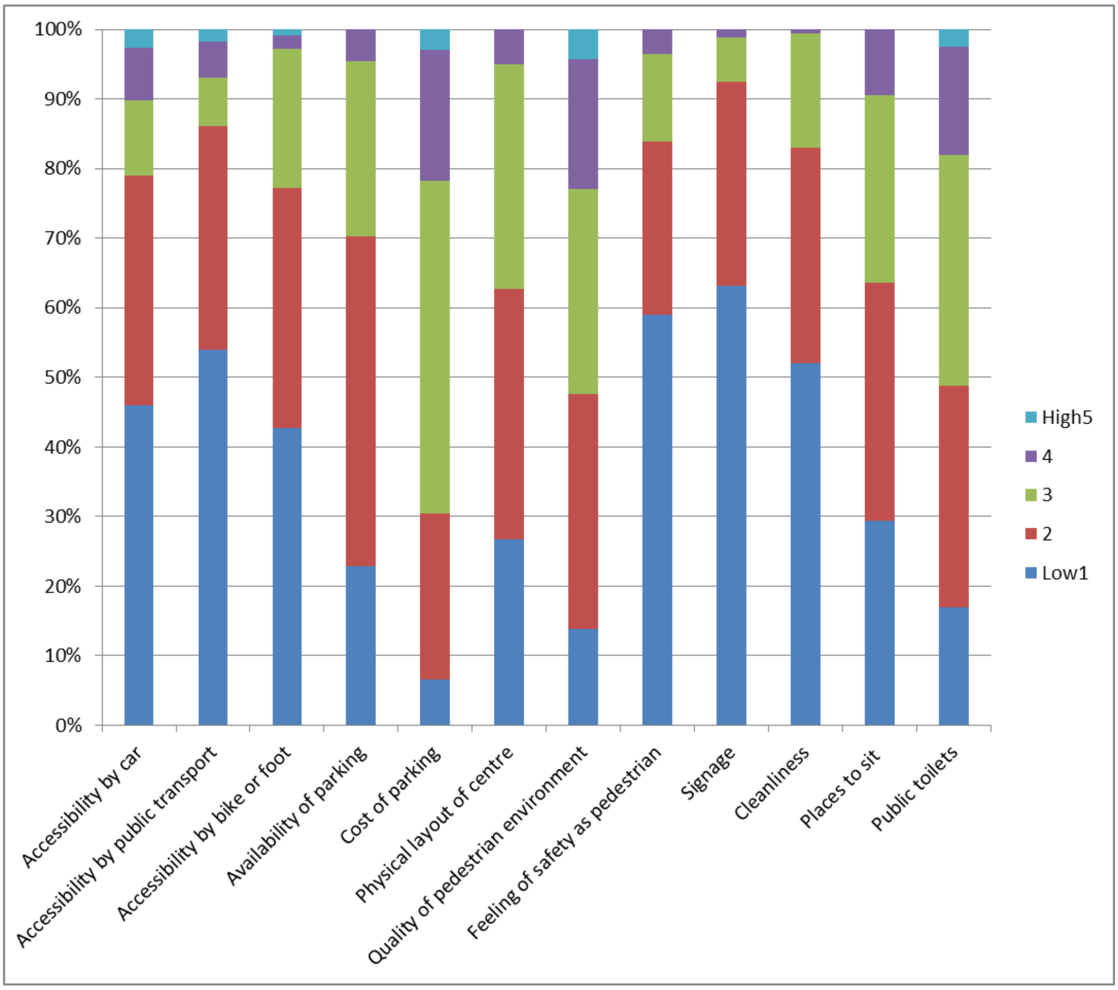
3.29 Figure 24 provides an analysis of information provided by Totnes residents questioned during the shopper survey about where else they undertake their shopping. 31.3% can be considered loyal to Totnes by virtue of the fact that they stated that they did not shop elsewhere or provided no response. Not surprisingly Exeter (23.2%) and Plymouth (17.9%) emerge as the most frequently mentioned alternative shopping destinations although Newton Abbot was mentioned in 14.3% of responses. In all these cases the principal motivation for shopping elsewhere was the range of shops available in larger centres with specific reference being made to particular stores such as M&S.

Figure 24 Alternative destinations for Totnes shoppers from street survey.



3.30 Figure 25 explores the factors which act as a deterrent to people visiting Totnes. These are rated from 1 (little deterrent) to 5 (major deterrent. The results reveal the top five deterrent factors (in terms of proportion of responses graded 3, 4 or 5) as the cost of parking, the quality of the pedestrian environment (the narrowness and unevenness of the town's pavements was frequently remarked upon), provision of public toilets, the physical layout of the centre in terms of the steepness and length of the shopping street, and the absence of places to sit. These last three factors may particularly deter the older visitor to the town centre.

Figure 25 Rating of factors acting as a deterrent to visiting Totnes by comparison with other centres



3.31 The survey specifically sought to establish if visitors to the town centre were aware of the ETO and whether it has had any impact upon their behaviour. Nearly 25% of respondents were unaware of the ETO and were therefore excluded from the analysis. Not surprisingly they were almost exclusively tourists or day trippers. Of the interviewees who were aware of the ETO just over two thirds (67.9%) stated that it had not changed their behaviour. 32.1% stated that the ETO has changed their behaviour of which 11.4% indicated that they were shopping less in Totnes while 5% stated they were shopping more. The remaining 15.7% felt they were shopping about the same amount but noted both the inconvenience of the new arrangements but also the reduced levels of traffic. Indeed there appears to be a broad consensus that the pedestrian environment and perception of safety has improved with the reduction of traffic using the High Street.

3.32 Comments made by respondents in relation to the ETO are set out in Table 11 below. Alongside the positive comments from pedestrians who feel safer and enjoy a less trafficked environment, it is clear that the ETO is impacting the way in which shoppers access the town centre. The comments highlight:

- The difficulty which the scheme creates for visitors wishing to pop into the town centre for a quick shopping trip (pop and shop)
- The challenge which people face in using the full length of Fore Street and High Street.
- Difficulty of accessing the town centre by car due to longer journeys and delays.
- Diversion of shopping trips to supermarkets and other towns.
- Greater use of public transport in preference to the car.

Table 11 Comments from the shopper survey

Miss popping out for what I need sometimes. Is now easier to just go to supermarket	Likes change but does not own car	Harder to just pop into shops, then got to park and pay
Road and pedestrian area up top of town is not good	Only made business slightly quieter	Feel safer because less traffic so town is more enjoyable.
Don't visit very often but it is a bit of an inconvenience. Hence now try to park in Co-op car park	Streets seem safe –less traffic	Don't like it. Made town inaccessible. For quick shopping it defeats the purpose.
Not enough time to go from one end to the other-has deadened the town	Doesn't influence my behaviour but it is inconvenient	Thinks it much better and safer
Feeler safer with new diversion	Crazy can't do the whole town	Feel safe with less cars Believe there is a total division of opinion but would rather the area was totally pedestrianized
Change of route is awful – needs to be all pedestrianised	Just feel safer as pedestrian, feels much better	Great-doesn't stop vehicle access, less traffic – easier for elderly and pedestrians
Feels safer	Town seems less congested	Use less due to car parking arrangements
Difficult to get into, heightens loads of cars and loss of trade	It has affected business but safer for pedestrians.	Feel much safer as a pedestrian
Rather pedestrianised, feels safer. Likes the change	Don't drive, cars are slower through town which is nice	Tend to use the train, but now traffic is now one way and less congested I feel safer
Tend to walk as road is a nightmare. Just use necessary shops as can't carry as much. Therefore I use Morrison's.	The town feels safer and cars don't go as fast.	Feel a lot safer as a pedestrian now traffic is one way
Just go by foot instead of car – dangerous – not used to crossing roads looking opposite way.	Work in a shop – seems quieter but it feels safer	Feel safer with one way traffic

Come less because using train instead of car.	Only walk, but it would be nice if butchers, banks and bakeries were up the top of town and gift shops at the bottom. Seems that gift shops dominate the top.	Feel safe but traffic at top of town a bit much seeing as pavements are small
Normally travel around and park at top of town which in turn makes me just visit shops at top as hill is tough but banks and butchers are at the bottom.	I would prefer to drive, hop into town and then drive back	New layout is a pain, takes longer to get to car park. Town was fine and didn't need changing.
Dreadful – only now drive into town because I have to. Roads are dreadful and summer will be diabolical.	I have to go all the way around	Pedestrianise it all
I avoid 'performance' around town centre road –was happy before. Now get bus to Paignton or Plymouth to avoid 'performance' around the town centre.	I don't know where to look now	I suppose now I go to other towns as there is more variety and as I can't do my quick shop here. Don't come into town much but go to supermarket
Feel safer as a pedestrian	More difficult getting out of town	
Prefer to get a bus into town than drive	Try to get space in High Street and then have to park in Steamer Quay.	Should have park and ride in town and need to get used to new way
They have made a pig's ear of it. Use train as since rerouting it is easier to just hop on train	Quicker access to town, nicer, safer environment. Got rid of rat runners –so much safer. People blaming the road for their business flaws. Believes people are overlooking the competition	It has improved, more pleasurable, safer for pedestrians
Just feel safer as pedestrian, feels much better	New road badly signposted. Try to visit whole town but sometimes just visit top half to avoid hill	Just a pain, town seems quieter. Convenience shops are at the bottom but now the bottom is more inconvenient to access

3.33 These comments tend to support the businesses analysis of the impact of the ETO on shopper behaviour in the town centre. Given that the survey was only able to interview people visiting the town centre it still identified 11.4% of relevant respondents who stated they are shopping less in comparison with 5% who are say they are shopping more in the town. It is evident that a greater feeling of pedestrian safety and a more attractive environment has been achieved at the cost of significant inconvenience to those who want to access the whole of the town centre by car particularly for quick purchases. Given that a significant proportion of the town's catchment live beyond walking or cycling distance and have limited access to public transport, the ETO appears to be deterring pop and shop visits and traditional 'carriage trade' from surrounding villages.

3.34 It is worth noting that it is not just car based users who are being deterred from visiting the town centre. Evidence provided by the 'Bob the Bus' Community Bus enterprise which serves the outlying communities of Bridgetown and Follaton reveals that bus patronage is between 25 and 30% down for all classes of passenger. This may be explained in part by the disruption which the ETO has caused to the previous route along Fore Street and High Street as well as the unpredictability of the service caused by delays, particularly at the Coronation Road roundabout. Such a loss of revenue is clearly of concern particularly as Bob the Bus serves the less mobile members of .the community. It also contributes to the reduction in footfall in the town centre.

4 INTERPRETATION

4.1 This section seeks to draw together the results from the surveys in order to reach a judgement about the impact of the ETO on the economy of Totnes town centre. It is important to state from the outset that this is a very difficult task as a great many factors exert an influence on the performance of town centres.

4.2 In this regard the study has sought to focus not just on the period since April 2013 when the ETO was introduced but upon the three years since the introduction of the rise in VAT in January 2011. During 2011 and 2012 the UK economy was in recession, from which it started emerging in Q1 2013. However throughout the period household incomes have remained under pressure as wages have grown slower than retail price inflation. Despite this economic recovery has until recently been driven by increased household consumption which can be seen in growing retail sales.

4.3 However it has become apparent that structural changes are taking place in patterns of retail expenditure with the continued growth of out-of-town shopping, discounters and perhaps most significantly internet shopping. This has given rise to concerns regarding increasing national retail vacancies which peaked at 14.6% in February 2012. Surveys also indicate falling footfall levels particularly impacting High Street locations.

4.4 The characteristics of Totnes town centre have allowed it to avoid the worst effects of recession and the closures which have characterised many town centres across the country. The specific factors which have contributed to the town's resilience are:

- The absence of significant 'out of town' competition. Unlike most towns, Totnes town centre does not face immediate competition from new supermarket operators. It is fortunate that the town's main supermarket, Morrison's is located in an edge of centre location which is likely to generate linked trips into the town centre.
- The independent character of the town's retail offer which is likely to make it less subject to competition from online retailers.
- The strong function which the town centre fulfils as a focus for social and community activities. This includes the Market and a range of community facilities such as the new Library and Civic Hall as well as Transition Towns Re-Economy project. In many ways Totnes is an exemplar of the type of town centre advocated in the Portas Report.

Reflecting these circumstances the town enjoys a relatively low vacancy rate by comparison with other West Country market towns. This does not appear to have increased significantly in recent years but evidence form other towns in Devon and Cornwall which have enjoyed a similar low rate of vacancies shows that changes can arise quite quickly.

4.5 Given these circumstances one might expect to have seen trade in Totnes beginning to improve as economic recovery started to take hold at the beginning of 2013. However analysis of information on revenues suggests that the town has continued to 'flatline'. Indeed during 2013 revenues were below trend for 7 months of the year by comparison with 4 in 2012 and 5 in 2012. This was particularly apparent during the first half of the year when the town centre was impacted by gas main replacement works (Jan to March 2013) and the introduction of the ETO from April 2013. While the late summer saw some recovery in critical Christmas period sales were down on the previous two years

4.6 This appears to have been a pattern which is broadly observable throughout the town although there is considerable variability between businesses with some continuing to grow. Detailed examination of like-for-like monthly sales since the introduction of the ETO shows the divergence of fortunes between different businesses in the town centre. While this supports the overall picture that the town is 'flatlining' the survey suggests that at least half of the town's businesses are fighting to maintain turnover. In many cases this has simply not been possible. The consequences of this appear to have been falling profitability and reduced staffing levels pointing to a significant reduction in employment in the town's retail sector which is the largest source of jobs in the town. Perhaps more worryingly 17% of businesses responding to the survey have had to inject more working capital. While in some cases this is to finance growth for the majority it is to maintain business operations.

4.7 Accordingly 10 to 15% of businesses responding think it unlikely or very unlikely that they will be trading in Totnes in 1 to 3 years and many more simply do not know. The closure of Stokes the greengrocer, which has been explicitly linked to the impact of the ETO, provides some indication of the challenge which some businesses are having in maintaining operations. Business confidence therefore appears to be at low ebb with a number of firms selling up or postponing investment decisions. Based on the findings of the survey, if existing trading conditions persists one might expect 20 to 30 businesses to cease trading in the foreseeable future. While every centre can expect a turnover of traders, particularly where a high proportion of them are independent, this level of change could undermine the attractiveness of the town as a whole, particularly if it gave rise to a significant increase in vacancies. This is likely to depend upon the extent to which landlords would be prepared to adjust rents.

4.7 The relatively large number of multiple retailers trading from Fore Street limits the amount of data available in this key section of the town which has traditionally been the 'prime pitch' commanding the highest rents. However, data from two businesses indicate sales for January and February 2014 down 6.5% and 28% and 7.4% and 14% respectively on the prior year. This represents a significant loss of trade from two established and actively managed retail businesses in a key part of town. If the prime section of the town's High Street is facing significantly reduced sales this is likely to impact on the overall appeal of the town centre.

4.8 While factors such as the timing of Easter and weather conditions may help explain month on month variations in trading performance, the key driver of retail business performance is footfall. This is highlight by the survey as the single most significant factor in terms of the trading of town centre businesses over the past 12 months. Businesses are able to track this through a variety of measures the commonest of which is the number of transactions. The evidence which has been collected through the survey points to footfall having declined by somewhere between 5 and 15%.

4.9 This level of impact is broadly consistent with information collected in the shopper survey which indicated that 11.4% of respondents felt that they were shopping less in the town as a result of the ETO. While this figure may be offset by the 5% who reported that they were shopping more, it does not take account of those individuals who are no longer shopping in the town centre. Such a reduction should perhaps not be a surprise from a scheme which was intended to reduce the amount of traffic penetrating the historic core of the town. However its implications for the health and vitality of the town centre are significant

4.10 While retailers will try to do everything in their power to convert visitors into sales a reduction of footfall of this scale represents a major challenge. Of course whether this is entirely attributable to the ETO is difficult to judge but there appears to be a broad consensus between businesses and shoppers about the following key impacts on behaviour:

- Reduction in short visit, car borne, convenience shopping ('pop and shop')

- Reduction in the ability of shoppers to visit all Fore Street and High Street leading to shorter trips.
- Reduction in the number of shopping trips by residents of surrounding villages thereby undermining Totnes' role as the local market town.
- Diversion of trade to supermarkets and other centres which offer convenient access and parking.
- Improve environmental conditions for pedestrians in the town centre and a perception of greater safety.

4.11 Given Totnes' traditional function as a market town, which also benefits from significant tourist trips from the accommodation base of South Devon as well as day visits from surrounding towns finding the right balance between accessibility by car and the pedestrian environment is critical. This appears to have been the subject of an ongoing debate over many years. Indeed every historic market town faces this challenge and needs to find an appropriate solution which supports business growth and employment whilst at the same time promoting highway safety and an attractive pedestrian environment.

4.12 The findings of the research undertaken over the past couple of months has identified that the ETO has brought about some significant changes to the way in which people use the town centre. Less people are visiting, particularly by car, and a significant proportion of town centre businesses have seen a marked reduction in turnover. The consequence is a reduction in profitability and loss of employment in a sector which is the town's largest source of jobs. For a number of businesses the situation is likely to be unsustainable and will result in an increased number of business closures.

4.13 In this regard it seems appropriate to conclude that the balance which the ETO sought to strike comes at a significant local negative economic impact and that alternative ways need to be found of delivering a truly sustainable solution.

Appendix A

Traders' responses on Questions 17 and 18 and comments on the impact of the ETO on trading performance (NB. 3 comments which relate to individuals or organisations and might be considered offensive have not been included)

Question 17

There is a lack of footfall especially on Saturdays

Daily till receipts show our customer numbers

Number of customers are 14% down

Shoppers in Fore Street and High Street don't visit on the same day. Since the ETO there has been a big change from people shopping from the bottom to the top of town.

Daily observation this year compared with last.

Quieter, less local trade. It's because people have to choose between the top and bottom of town, rushing before ticket expires. A lot use Morrison's car park and shop alternately at the top and bottom.

Less footfall and less donations through the door.

Footfall is down by 50% - customers spend less time due to parking restrictions.

Footfall is down

Longer walks from car parks are not good for older clients.

Less people visiting – more business over the phone and more costly deliveries

Increased footfall – all cars drive past shop to go up High Street (Trader in Station Road)

The evidence of the impact of the ETO is in sales.

Footfall is down 20% and frequency of visit is down by a quarter.

Customer numbers have dropped dramatically – there are less people visiting. The Coop car park has more free spaces than previously.

Footfall figures are sketchy except Nov/Dec 2013 which both saw increases.

Footfall counters show negative impact. Local customers only - people from further afield are made to feel unwelcome by signage and are unaware of how to get onto High Street.

We have identifiable data on a) personal card machine summaries and b) transaction numbers.

Footfall is down but cannot provide proof.

Numbers of paying customers are down on average 7%. We used to have 20 customers a day park on double yellow lines to pop into shop. Now we have an average of 2.

Shop sales are down (as a component of overall business).

I have had my shop for 21 years and survived the credit crunch but I have never experienced such hardship. My figures reflect this.

Parking meters outside my shop are not used during the day as much.

Number of people at the bottom of the town is down.

Footfall is hugely down because of parking. The Plains have become quite desolate in the past couple of years even more so because of parking.

Footfall is down 10% - fewer visitors therefore it is now mostly local trade from people living or working in Totnes.

Not counted footfall but clearly far fewer on the street and shorter stay because of parking charges.

No evidence but staff as footfall is reduced – less visitors, less frequent visits (customers tell me this) and limited length of stay because of expensive parking.

Question 18

Long stay and permit holders in Heath Nursery are hogging spaces. Heath Nursery Car Park should be changed to short stay. We need more 20 or 30 minute free parking. Why is there no park and ride?

Customers find it confusing and believe that they cannot drive up High Street

Now doing more home deliveries as customers believe they cannot reach the store by car.

There are empty parking spaces on street which never occurred before the ETO.

2011 - 16,369 transactions at average of £7.02, 2012 16,364 – transactions at average of £7.01 and 2013 - 15,748 transactions at average of £7.28 (largely due to inflation). This demonstrates the reduction in footfall.

Since the ETO I have noticed a large drop in trade from Kingsbridge, Dartmouth, Ivybridge and Plymouth. Each morning and evening main roads in and out of Totnes are gridlocked.

Bad signage – it's a joke! Changed flows causes jams all around town which is stationary at all hours not just peak. Traffic goes up Fore Street the wrong way and is therefore dangerous.

Totnes, even in winter times is very difficult to leave in the evenings due to the increased traffic in the lower part of town.

Just another nail in the retail shops in the High Street coffins!

We have not noticed a negative impact from the ETO.

I have sold my business at a greatly reduced price. The ETO was the final nail in the coffin of Totnes.

Some companies charge more for deliveries as they now take so much longer especially in the summer.

Last year was the first time in 6 years you could easily park in the street.

Due to lack of visitors I have contemplated running my shop on one person.

Customers continually complaining that front door leading to Totnes High Street is now shut and un inviting. The customers that do come into the shop are still spending at the same level but there are fewer of them.

Last year gross profit had fallen to 51.9% from 57.7% and we expect it to drop again this year due to amount of sales we have to do.

Last summer in the run up to Xmas the town seemed busier than for several years. Many customers commented on how much more pleasant it was with less traffic.

Banning traffic completely would be disastrous (Main Street is half a mile long and very steep) but ETO allows essential traffic and achieves the best of both worlds.

Signage is still ineffective therefore many drivers still cannot work out how to get into the High Street (as against Fore Street). Many customers now go to Newton Abbot – it's flat and less hassle.

We fell that footfall has reduced dramatically in our store and we cannot sustain these decreases in sales numbers. There is evidence that Totnes is underperforming other stores.

Footfall data (number of sales) 2010 – 27,272, 2011 – 26,712, 2012 – 25029, 2013 26,772.

In time people will visit Totnes more often now it is so much better for pedestrians. Investment needs to be made to make the main street look like a place for pedestrians with cars and lorries rather than a road that people can walk in. It's a pity that Devon CC did not get signage sorted before bringing in the ETO instead of months later.

We are new to Totnes but feel that the road changes have had a negative effect on Totnes. It's confusing for visitors and even those that live outside the town also. I think it's dangerous for the traffic to flow in the opposite direction halfway down the street. I've stepped out without looking in the right way in Fore Street.

Sales are down this year but due to a complex combination of factors including online sales and e-books and the general state of the economy. In my personal opinion the shopping environment at the top of the town with the narrow pavements is much more pleasant with the absence of rat runners but people can still get their cars here to drop donations. Most other shops in our region (west of Totnes) are also experiencing a downturn.

Health and safety issues have increased with traffic flowing downhill. Gravity as well as children having to get in and out of cars on the traffic side. Compared to other market towns in the area we are trading -10% versus their +12%.

There is a decrease in people visiting Totnes – they don't know how to get up the High Street. People ignore the no entry sign at the bottom of Fore Street during late night/early morning and there is lots of confusion at the roundabout on the Plains.

I believe the ETO is detrimental as it has reduced the amount of times people commuting and living in South Hams and Torbay 'pop' into Totnes.

Customers on my mailing list who we are in contact with regularly say that they now come to Totnes very few months instead of little regular visits as they no longer use Totnes to 'pop' into to go to butchers, banks, newsagents etc.

Vast majority of shopper comments are favourable. The ETO has improved the pedestrian shopper experience hugely. I fully support the ETO and would welcome full or partial pedestrianisation.

The ETO has benefitted my business, my customers prefer it. Now we can leave the shop door open and passers-by can hear harp music live from 50 years away.

'Bread and butter' trade has diminished. Some of the vehicles that do use the High Street and Fore Street still travel with excess speed for its environment. 10 MPH max please even with ETO.

The ETO is forcing car users to choose which end of town to visit - down or up – and the queues in Coronation Road and round the back of town are deterring locals. Nothing has been done to alleviate the problem of through traffic except a filter land on Coronation Road which has made matters worse in terms of queues.

Our turnover is down on average 3.5% for the period but paying customers are down 7% so average spend is up so we are providing the right goods and service. The problem is less people visit the store due to the ETO.

The ETO has divided town into two halves – both economically and socially. I am deeply concerned about the long term effects.

I am watching shop after shop closing down and I am fearing this for myself too. They are saying on TV that we are edging out of recession – 2 years ago we were edging out and the proof is in my figures.

Trade is lost during the evening rush hour. We find that hour of trading each day is less than before change. Congestion at the bottom of town is too great to attempt getting to Fore Street or High Street. Motorists before change were not rat runners. They shopped by car on their way home. Now it takes too long to get to the High Street so they shop elsewhere and do not attempt to come up in evening rush hour.

People would stop in the morning on the way to work but they have stopped doing this because they have to go back round the road via Morrison's and this will take 10 minutes – twice!

Totnes has lost its sparkle. People tell me that parking is bad, getting into Totnes is bad. They don't know how to as it is not signposted well enough. When the season starts again the traffic which is now being directed around the town becomes gridlocked and people get fed up being stuck in it, can't find anywhere to park and leave to spend their money elsewhere e.g. Newton Abbot, Ivybridge. My customers say they are late because they can't get into Totnes and can't find parking spaces. Please help Totnes get its MOJO back and quick!

Many visitors are frustrated by the increased traffic congestion. Fore Street is particularly suffering as people do not want to go back into the traffic jams. People cannot 'pop and shop' anymore as the town is divided into two and so this is drawing people to supermarkets and free parking. Signage is poor (and only recently implemented) an d customers have complained that they were set off on the Kingsbridge Road (Western By Pass) and it was difficult to find anywhere they could turn and come back again to Totnes. Many customers have complained they couldn't find the town centre e.g. xxxxx's chauffeur couldn't find entrance and he parked at the bottom of the town and she had to walk up.

Coach drivers have informed us that they will not bring parties on Sunday as traders do not support Sunday opening so there is no point. Customers tell us that they no longer come into the town every week because the traffic is too heavy. Instead they go to Newton Abbot or Paignton or visit once a month.

I have a CCTV outside my shop which shows on street parking for shoppers which was always full before the ETO and I've noticed the footfall of people is very much down, particularly midweek. I hear from delivery drivers that they have to make several trips around in order to service middle, top and bottom parts of the town. Also customers have commented on difficulties parking due to high tariffs and also difficulty accessing the town centre due to traffic jams around Totnes.

Additional comments from traders on the impact of the ETO and other factors on trading performance

We are a professional service business and do not rely on passing trade but access to our office is vital for clients and staff. We have noticed clients having problems finding us and strongly believe that the ETO with reduced traffic in town is dramatically affecting trade…and the old access from the Plains should be reinstated.

Totnes' bubble has burst because of the economic downturn. The ETO has compounded this for some businesses but I feel that the whole town's spend is the same as people are able to move around more.

There was a 13% reduction in takings over first three months of the ETO but in the autumn we saw a 33% increase in takings. We saw this as teething problems due to poor signage and jams but the Narrows feels calmer and pedestrians feel safer.

Trade has fared well since the banking crisis. Only since April 2013 when all the Government's cuts took effect have we noticed a downturn in business. When the road was closed for gas works in January to March 2013 business improved.

Totnes was an all year round thriving market town and it is apparent that with less people coming in from surrounding towns local residents cannot sustain the local economy. The most marked difference we observe is the reduction of 'pop and shop' as convenience and accessibility to Fore Street is greatly reduced since the ETO. 'Popping into Totnes' is no longer easy or attractive. This is evident at peak times i.e. school run times which were previously very busy as people shopped en route.

The convenience of a town 'cut in two' as one customer put it cannot be underplayed. To visit the entire town running errands and shopping requires the double circuit to do Fore Street and then back round again to High Street. This is not supportive of 'pop and shop' and makes impulsive trips and spends greatly reduced – it is easier to go elsewhere especially so when neighbouring towns have all day parking for £2.

Our appointment diary acts as reasonable evidence and indicator of shoppers changed habits. Since the ETO we come across less as an established business with consistent trends. The ETO has a clear influence on this and customer feedback supports this. While from Easter on the season will improve we should be a busy town all year round and not heavily dependent on tourism.

Stop wasting money on this subject. Traders should spend more time promoting business rather than exhausting all possibility of changing the direction of traffic in Totnes.

The change in traffic flow does not appear to have had a negative effect but without it perhaps we would have done even better. We are still not back to our figures of 2010.

We have had to work much harder to maintain sales by attracting new customers from outside the area and have to rely less on locals who no longer pop into Totnes from the surrounding villages.

Online retailing has hit my business massively in the last few years although the turnover drop % is less severe in the last 12 months. Margin has improved as a result of ordering direct from overseas so my profit is hardly changed.

In order to maintain turnover figures I have had to sell a lot of stock at discounted figures or even at cost price as we have not had the footfall. This has meant that year on year figures are comparable but profit has decreased. I would have hoped and expected for there to be a slight increase in figures in this my second year as I am more established.

Our monthly figures are affected by weather and the timing of Easter. However having bumped along (what we thought was the bottom) for 2009, 2010, 2011and 2012, the road closure has meant our numbers have slipped by up to 10% for 2013/14.

Shop sales are down but have kept same level of turnover by working outside of town.

In my opinion after being in my shop last 20 years the footfall numbers are considerably down and I have been speaking with local people who do not come into Totnes due to heavy traffic and gridlocked roads.

Turning off access to the town – visitors confused as to where to enter the town.

Because people are finding it hard to get into Totnes let alone find suitable parking they are just not bothering

DCC Economy and Enterprise comments on

Totnes Experimental Traffic Order : Economic Impact Study

This report aims to ascertain whether and how the ETO in Totnes has had an economic impact upon businesses in Totnes town centre. The report concludes that the ETO is having a detrimental effect upon town centre businesses. However, on closer examination, it can be argued that the report has overlooked certain aspects of this issue, and some tenuous links are drawn between its primary data and the impact of the ETO.

Although the report begins from a relatively neutral position, in many instances its analysis of survey data can seem biased in favour of the idea that the ETO is having a negative impact.

National trends

The report suggests that Totnes, although comparatively resilient, has seen business 'flatline' over the last 3 years. A detailed explanation of UK wide trends in high street retail is provided, pointing to negative trends across the UK over recent years. Similarly, figures for the South West indicate the second largest decline in high street footfall in the year up to March 2013 was in this region - mentioned in the report.
All other things being equal, it would be expected that Totnes' town centre would experience similar levels of decline. In order for the report to present a truly balanced argument, explicit reference needs to be made to this, which was not done.
The contribution of UK wide economic trends *are* mentioned, but could be made much clearer, and need to be incorporated into the conclusions of the report, in particular the effects that national trends in supermarket shopping are having – there is no clear link to be drawn to a different effect that supermarkets are having in Totnes compared with elsewhere without further evidence. Likewise the specific effects of internet shopping upon trade nationally compared with Totnes have not been analysed statistically, but have been alluded to.

Business questionnaire

While the report centres around the assertion that business in Totnes has 'flatlined' over the last 3 years, it can be argued that significant assumptions have been made here.
As is mentioned in the report, there is no authoritative data source on this subject, as much of the reporting on local business trends is done on an ad-hoc basis and the report seems to assume business is 'flatlining' on the basis of just 42 business questionnaire responses that included financial information. Whilst this may well be a correct assumption to make, in order for the report to comment accurately on business trends in Totnes', more comprehensive data is needed. This is especially the case, since the report refers to a number of business who have actually been 'able to buck this trend' and have increased their turnover, disproving the idea that business is in decline across the board, and contradicting the report's own claim. Therefore, the report is essentially based on the assumption throughout, that business *has* been 'flatlining' in Totnes, which again, is a major uncertainty and hasn't been incorporated into the conclusions of the report.

Definition of flatlining

A definition of what is meant by 'flatlining' in this context is also needed, as this is a relatively vague term, yet is central to the report. The survey undertaken, refers to a decline in footfall and business revenues in Totnes, therefore it is unclear whether 'flatlining' refers to a plateau in business growth or a decline.

Identification of trends

According to the report, analysis of the financial data gathered by the business survey shows that business in Totnes is 'flatlining' and there is a 'prolonged period of subdued performance coinciding with changes to traffic flows along Fore Street and High Street'. However, what is not mentioned is that there has been a general upward trend in business revenue from the

start of 2011, from which there appears to have been little deviation. Similarly, there was no slump in service business revenue after the ETO was introduced, this can be seen in Figure 15, yet is not mentioned in the report. The increase in overall business revenue during Summer 2013 – after the ETO had been introduced- was also greater than previous years and overall business revenue and retail business revenue have oscillated significantly after the ETO was introduced, rather than remaining static or steadily declining, this was also not mentioned in the report.
Similarly, the report also presents the percentages of businesses reporting monthly changes in sales from April 2013 to December 2013 in table 9, stating that within the +/- 20% range 'the majority of months show more businesses reporting a fall in sales and generally at higher percentages'. This is an extremely vague analysis, and also neglects that fact that considerable percentages of businesses still registered significant growth – in some cases 30% or more - especially at the end of 2013, as these businesses are excluded from the report's analysis. This needs to be included, if the analysis is to be balanced, and data from a longer time period also needs to be used, to determine if these instances of business growth and decline are part of a long term trend, or confined to 2013.

The report also examines business revenue data for 4 specific areas of Totnes, including Fore Street, which would stand to be most affected by the ETO. According to the report Fore Street revenue data shows a 'clear divergence of fortunes' after the introduction of the ETO, implying that revenue has disproportionately fallen here, compared to the other areas. Looking at the graph (Figure 19), although there is a very slight dip in all Series, after the introduction of the ETO, all the Series then increase and Series 1 and 3 reach a greater end of year peak than in 2011. Importantly, revenues are already low – as expected at the beginning of year – when the ETO is introduced and already appeared to be dropping slightly before the introduction of the ETO. Greater discussion of what specifically is meant by a 'divergence of fortunes', and the justification behind this, needs to be included for this analysis to be balanced. It also needs to be noted that this graph only includes 3 datasets, which limits its representativeness.

Importance of footfall on business revenue

The business survey points to a reduction in footfall as the main cause of concern for town centre retailers in Totnes, and is cited as being a major factor in their lack of business revenue. According to the report, the business survey indicates that the issue of footfall is seen as more significant over the past 12 months. Looking at Figures 21 and 22, it is unclear where the justification for this comes from, as the proportion of businesses ranking visitor numbers and footfall as the most important influence on their trading performance seems to have stayed exactly the same. Therefore, without further clarification, this conclusion remains tenuous.

Observed decline in footfall

Importantly, the report makes a significant assumption: that Totnes has experienced a decline in footfall over the last 12 months. A figure of a 5 to 15% decline is quoted, yet it is unclear what the methodology behind this is. A selection of figures provided by businesses to illustrate a decline in footfall numbers is listed in the report. However, there is no standard figure given, and there is no explanation of the methodology used to calculate the overall figure used in the conclusions of the report. There is also no indication of precisely how many traders have observed a decline in footfall. Therefore, the validity of this is debateable without more evidence to indicate whether this is the case or not.

Shopper survey

According to the findings of the shopper survey, 11.5% of visitors interviewed said that the ETO has made them shop less in Totnes. However there is no indication of the actual number of respondents, or to what degree they have been 'shopping less'. The limitations of the survey are mentioned to an extent in the report, however bearing in mind the highly qualitative nature of the survey, and its limited sample size, concluding that footfall is decreasing, on the basis of this survey is tenuous.

Although a decline in town centre footfall is a potentially valid assumption to make, given national trends, car parking data for the same period indicates that although on-street car parking has declined, off-street car parking has increased, and is likely to have compensated for the decline in on-street parking. It is acknowledged that the authors of the report did not have access to numerical car parking data until after publication. However it is understood that the general trends had been communicated verbally the week before and car parking figures can provide a reliable proxy for visitor numbers.

The report also draws the conclusions that there have been a reduction in the number of shopping trips from surrounding villages into Totnes and that visits to Totnes are of shorter duration, without backing this up without correlating this to specific responses.

Importance of wider factors

It may well be the case, that *some* of the businesses surveyed *have* experienced a decline in footfall over this period and a decline in revenue as a result. However, if observed changes in business revenues happen to occur alongside the implementation of an ETO does not automatically mean that the ETO is responsible and needs to take into account longer-term trend data. Furthermore a correlation between the two cannot be assumed, yet the report has made this assumption, and has provided no justification for this. Although there is extensive mention given to the wider economic context of town centres in the UK, this does not seem to have been incorporated into the analysis sufficiently.

When drawing conclusions the report attempts to link the ETO with negative business trends at every opportunity, without any discussion of other local factors. For example, although the gas main repair work along Fore Street ran between January and March 2013, it is also reasonable to suggest that it might take an additional period for the local economy to recover from the impact of this. This means that when the ETO was introduced in April 2013, the shops in Fore Street that the report argues experienced a reduction in revenue as a result of the ETO, may actually have still been feeling the effect of road closure due to the gas main repair. Without incorporating other local factors like this into the analysis of survey data, it is not possible to present a balanced argument. Similarly, as mentioned, wider economic trends have also not been adequately discussed when analysing survey responses.

Therefore, there are several issues with this report, which limit its validity. The data collected that points to a reduction in business revenue as a result of a reduction in footfall has multiple issues, and the conclusions drawn from this are in places quite tenuous. Most importantly though, is the assumption throughout any analysis, that the ETO is the reason for these negative business trends, and a lack of consideration of wider factors. This means that this report does not seem to present a balanced argument.

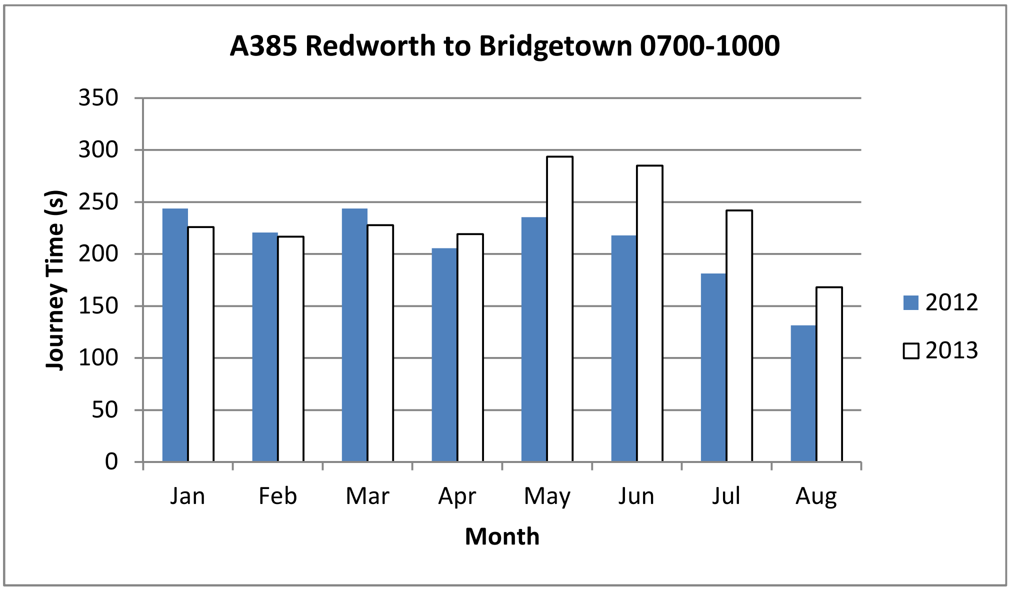
Conclusion

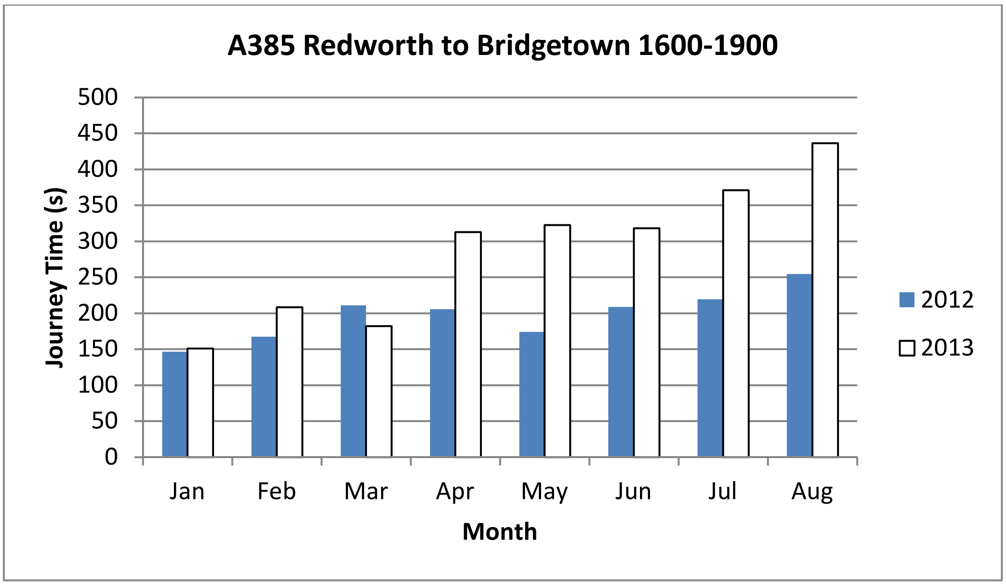
The report draws the conclusion of significant local economic cost of the ETO, but ignores the effects of wider UK shopping trends in Totnes, including year-on-year rises in internet shopping. It looks at a very narrow time period, without drawing out wider retail trend effects specifically on Totnes and in its conclusions tends to discount results where businesses are performing well, thereby not assessing the whole picture of retail business in the town. While ETO and Wales and West Utilities works took place in early 2013 a temporary drop in trade may have been expected, however, post-works business conditions appear to have returned to trend and in some cases have been better. These factors also need to be fully assessed to provide a fuller and more balanced picture of the ETO effects in Totnes.

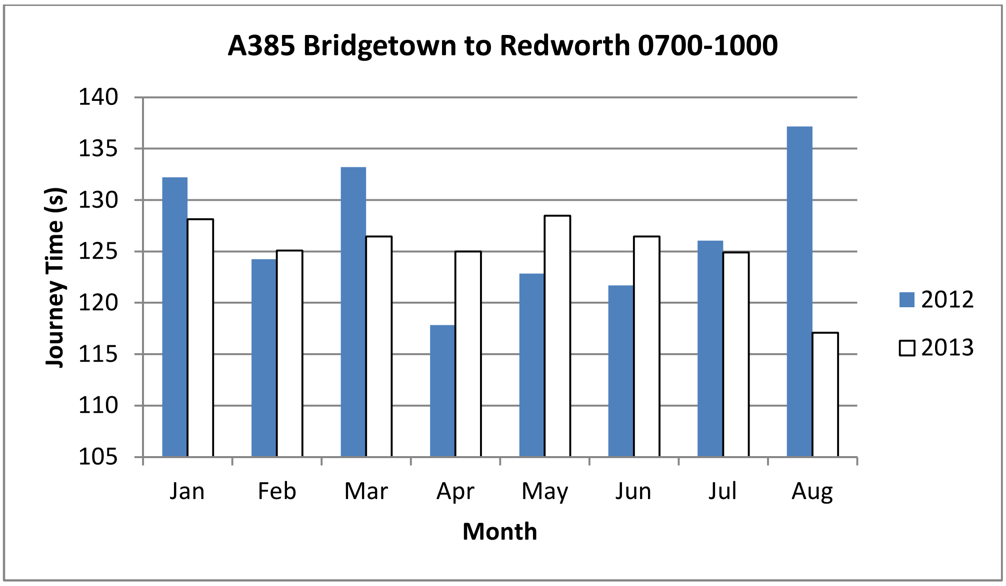
Jamie Evans
Senior Economic Development Officer

Department for Transport Congestion Monitoring

Roads in Totnes, January to August 2012 and 2013.



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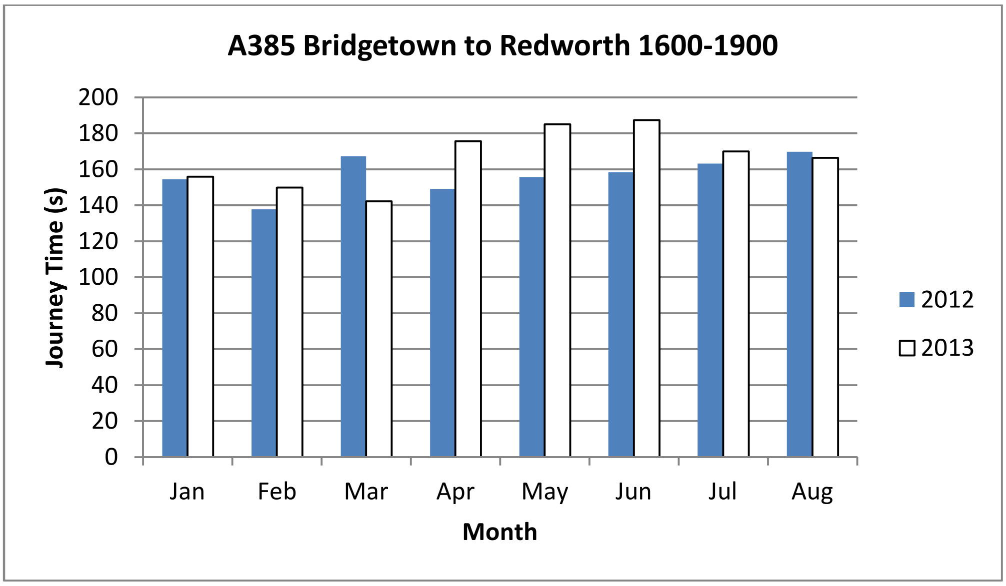
Journey Time (s)
140
135
130
125
120
115
110
105
Jan
Feb
Mar
Apr
May
Jun
Jul
Aug
Month
2012
2013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Journey Time (s)
200
180
160
140
120
100
80
60
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20
0
Jan
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Mar
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May
Jun
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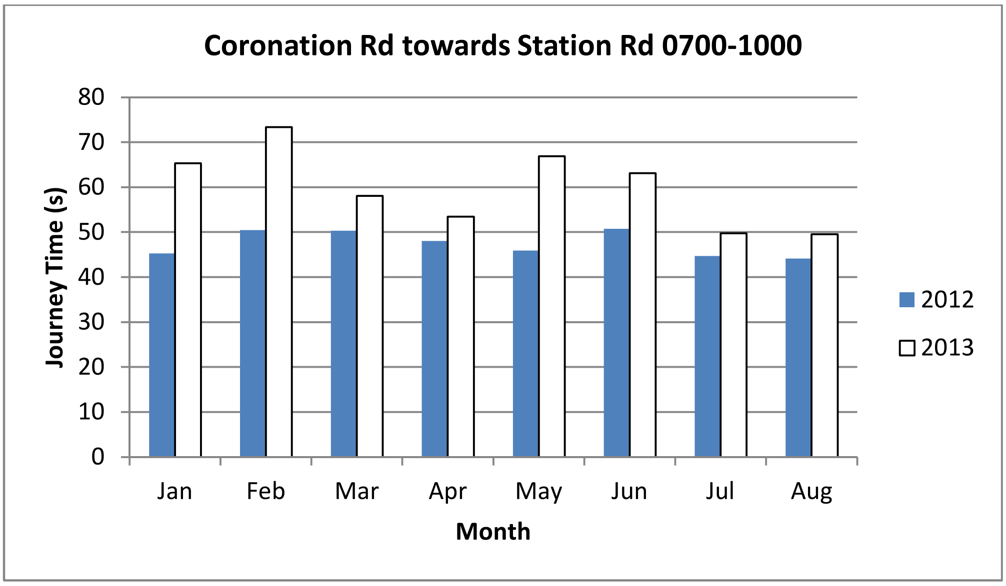
Aug
Month
2012
2013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80
70
60
50
40
30
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10
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Journey Time (s)
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Feb
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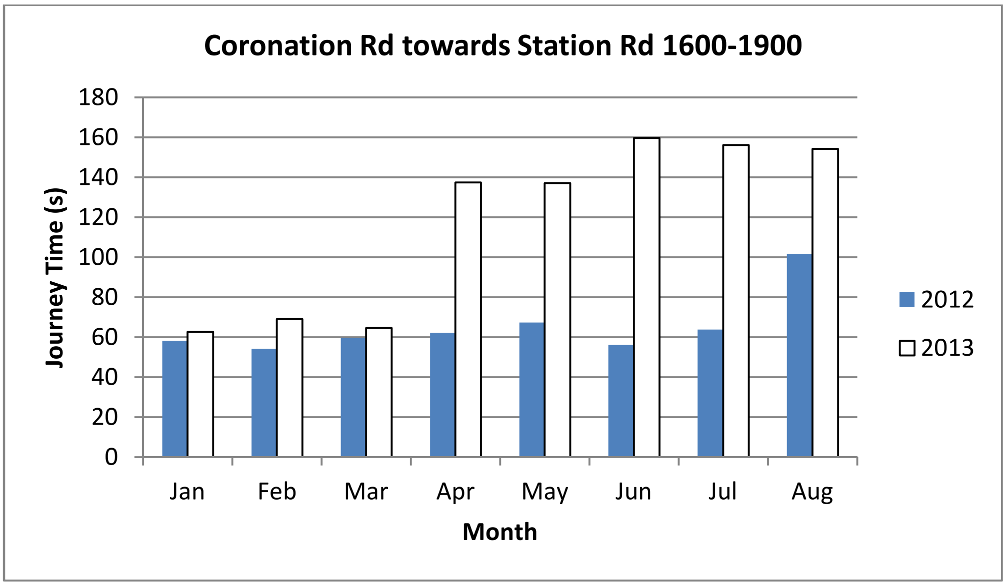
Jun
Jul
Aug
Month
2012
2013


Coronation Rd towards Station Rd 1600-1900
180
160
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Journey Time (s)
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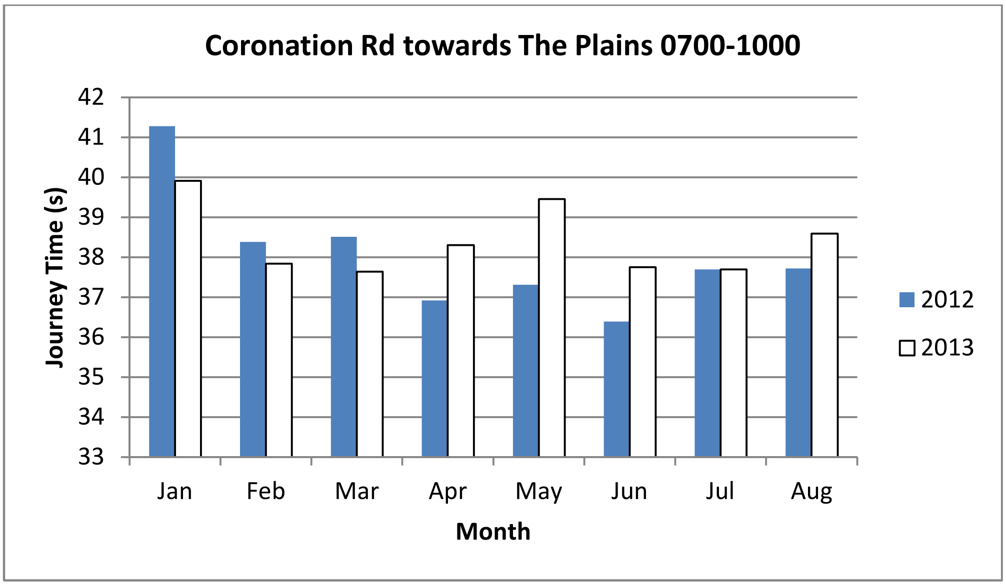

Coronation Rd towards The Plains 0700-1000
Journey Time (s)
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41
40
39
38
37
36
35
34
33
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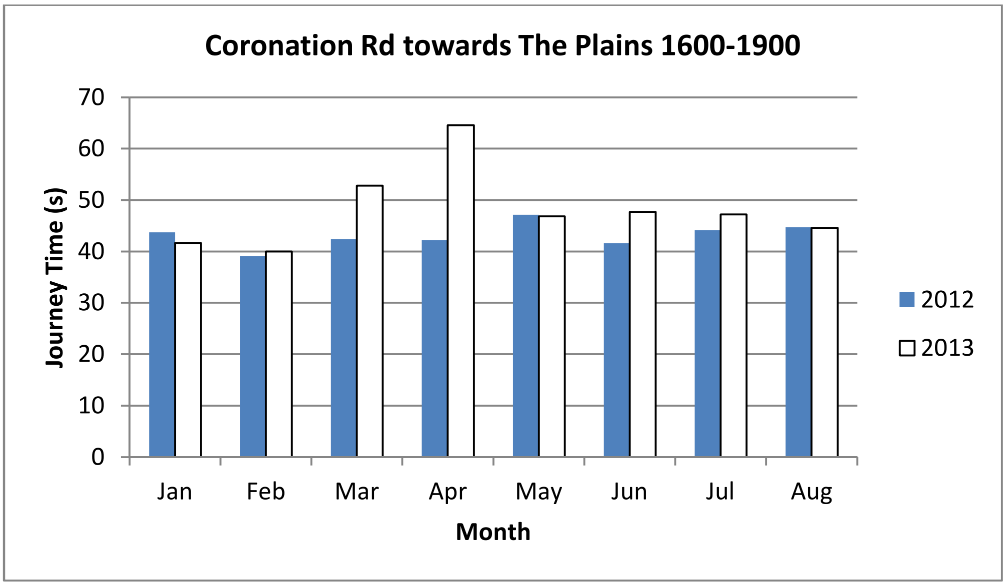
May
Jun
Jul
Aug
Month
2012
2013



Coronation Rd towards The Plains 1600-1900
Journey Time (s)
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20
10
0
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Feb
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Jun
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Aug
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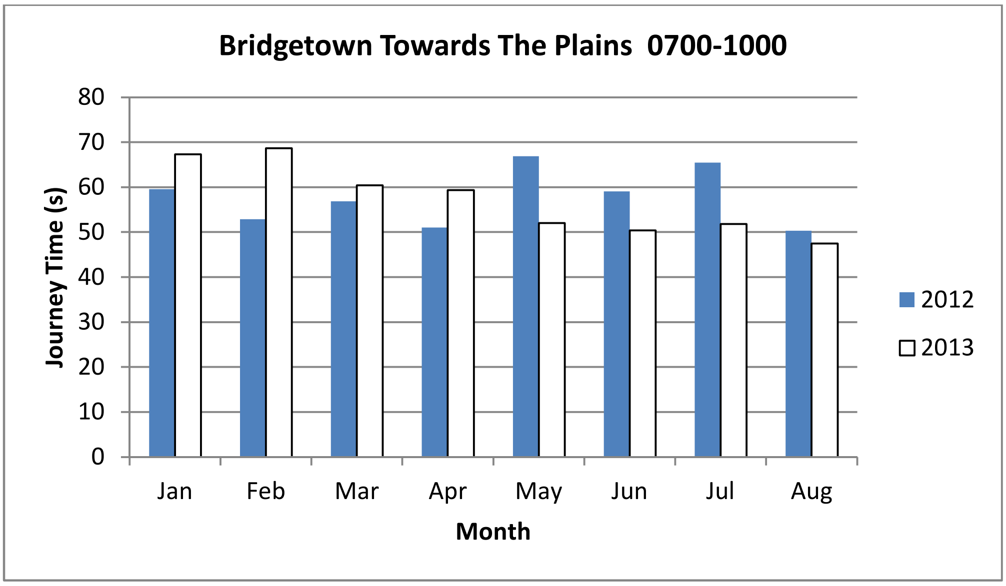
2012
2013


Bridgetown Towards The Plains 0700-1000
Journey Time (s)
80
70
60
50
40
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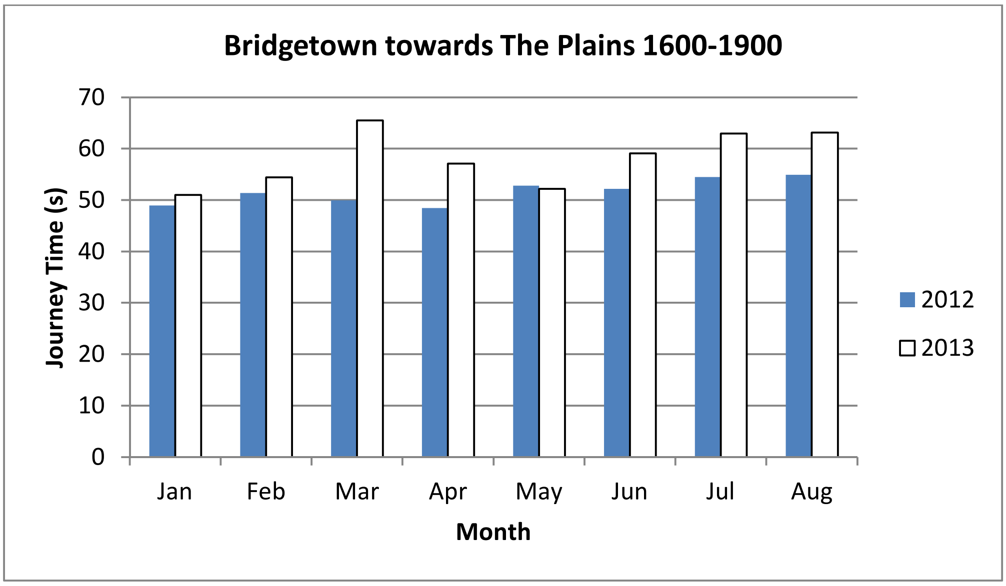
2012
2013


Bridgetown towards The Plains 1600-1900
Journey Time (s)
70
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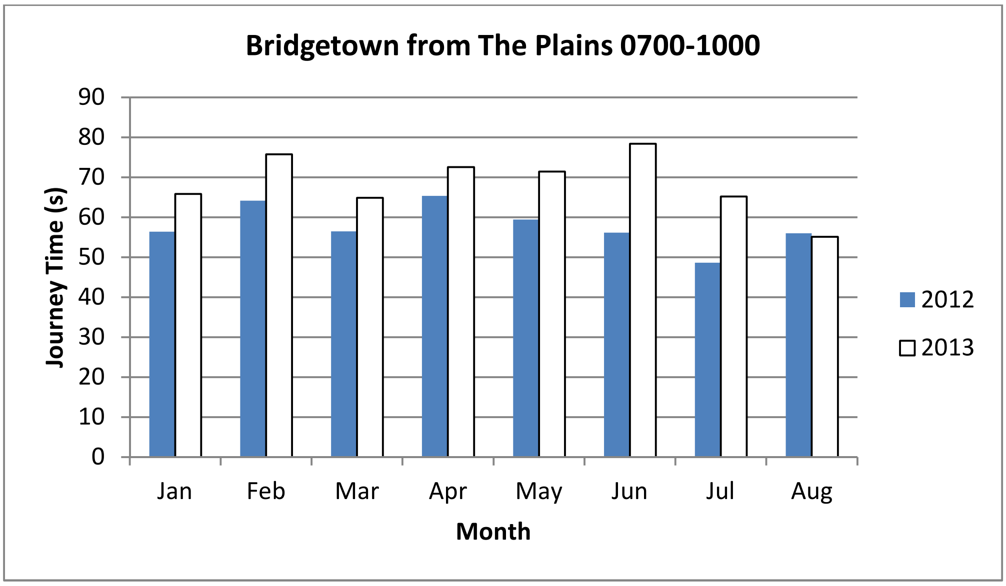
2013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Journey Time (s)
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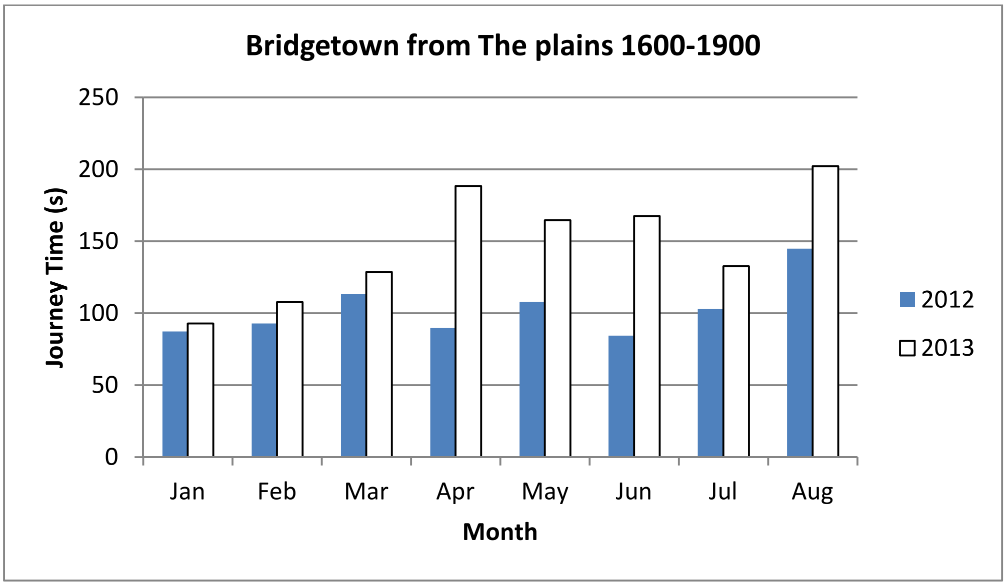
2012
2013


Bridgetown from The plains 1600-1900
Journey Time (s)
250
200
150
100
50
0
Jan
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Jul
Aug
Month
2012
2013

Appendix VI

Totnes ETRO 2013 Feedback

- Summary of feedback numbers
- Feedback FOR
- Feedback AGAINST
- Feedback OTHERS
  . Observations
  . Clarification wanted
  . Only if
  . Not sure

Summary of feedback for Totnes ETRO 2013

11/04/2014

	Feedback received from:	Against	For	Clarification wanted	Observations	Only if	Not Sure	Total
		89	**95**	**4**	**5**	**2**	**3**	**198**
5	Bob the Bus	4	0	0	1	0	0	5
2	Commuter	2	0	0	0	0	0	2
2	Ex-resident	1	1	0	0	0	0	2
1	MP		0	1	0	0	0	1
44	Not Known	25	16	1	1	0	1	44
86	Resident	22	62	0	2	0	0	86
23	Shopper	9	11	0	0	1	2	23
29	Trader	21	4	2	1	1	0	29
6	Worker	5	1	0	0	0	0	6
198		**89**	**95**	**4**	**5**	**2**	**3**	**198**

	Date	Street Name	Post Cod	Town	1Resident Visitor Trader	For /Against	Comment 1	Comment 2	Comment 3
6	01-Jul-13	Sparrow Road	TQ9 5PI	Totnes	Resident	For	this is by far the best thing to happen to the town since 1992	trade is down throughout the country	Congestion needs to be sorted but to go back to old lay would be madness
9	24/05/201319	Plymouth Road		Totnes	Resident	For	improved shoppers experience	Empty shops must have made decision before gas works and not result of new layout	better signing required, parking costs??
10	29-Jun-13		TQ9 7RZ	Harberton	Shopper	For	No drop in footfall	drop in sales maybe down to not selling what buyers want	pedestrianise top of town if psiible and into duce 1/2 hr free parking
11	25-Jun-13	Plymouth Road	TQ9 5PH	Totnes	Resident	For	Much more pleasant to shop now	downturn in trading also down to the recession, poor business models, the poor weather and the road works	Totnes is a welcoming and inviting place to walk in.
12	31 May 1302 /	Weston Lane	TQ9 5QT	Totnes	Resident	For	Safer and more enjoyable	parking is still avaible for shoppers	downturn in trading also due to weather and recession
14	08-Jul-13	Nelson Close		Staverton	Shopper	For	Calmer and safer	access is easier from my direction now	I now spend morer tome and monet in town
15	01-Jun-13	Glendale Terrace	TQ9 5NY	Totnes	Resident	For	Has reduced rat-runners	parking is still avaible for shoppers	Poorly signed. Signing needs to be improved
16	26-Jun-13	Bridge Road	TQ9 5F(	Totnes	Resident	For	safer and more pedestrian-friendly	trade will improve over time	Better long-term signage required
18	27-May-13	High Street			Trader	For	Reduced traffic means a more relaxe shopping experience.	downturn in trading also due to weather and recession	a proper trial length is required
19	24-Jun-13	High Street	TQ9 5SN	Totnes	Trader	For	Will benefit long term...More pleasnt without rat runners.... footfall same by card transactions but value of sales down due to possible buying from interent and endless recession…	Keep ETRO going for at least another 6monts	Better long-term signage required

	Date	Street Name	Post Cod	Town	1Resident Visitor Trader	For /Against	Comment 1	Comment 2	Comment 3
22	23-May-13				Not Known	For	The high street feels so much safer	It is still possible to drive through town centre	
25	03-Jun-13	Home Meadow	TQ95XY	Totnes	Resident	For	Shopping now enjoyable		
26	28-May-13	Fore st			Resident	For	Rat run has stopped	parking is still avaible for shoppers	Right turn for large vehicles need to be improved
27	12-Apr-13	CHRISTINA PARK	TQ95UR	Totnes	Resident	For	Disable drivers can exit directly on to the footway on Lower Fore St .		
28	22-May-13			Totnes	Resident	For	Much safer to for peds	Reduced traffic flow	add traffic calming on Station Road
30	29-Jun-13	The Lamb	TQ9 5SE	Totnes	Resident	For	Only if Shared surface later		
32	24-May-13	Bridgetown			Resident	For	,taking the anxiety out of using the High Street.	seems to be advantagous to locals and visitors	
34	08-Jul-13				Not Known	For	Safer and calmer	Clearly ped numbers are up	
35	03-Jan-00	South Street	TQ9 5DZ	Totnes	Resident	For	The reversal of traffic has had such a positive impact. The reversal has led to a huge reduction in traffic racing up the High Stree		
39	28-Jun-1310-A	Fore st			Resident	For	Stopped rat running more pleasant to shop	Trade will pick up once everyone gets use to ne wlayout	Safer to cross Statn Rd / Fore St jnc to slower vehicle movements
40	22-May-13 09-Jul-13 19-Sep-13	Fore st	TQ9 5NJ	Totnes	Resident	For	better place to live, free from the noise and fumes of traffic, which constitutes a considerable safety hazard	will be a positive effect on trade in the medium and long term	
42	15-Jun-13			Totnes	Resident	For	Better for peds, down turn posss due to other factors	Better signing required	
43	15-Jun-13			Totnes	Resident	For	Better for peds, down turn posss due to other factors	Better signing required	
49	24-May-13			?	Shopper	For	are able to drive up the street and park usually	Well done!new scheme is great for myself and my mother	

	Date	Street Name	Post Cod	Town	1Resident Visitor Trader	For /Against	Comment 1	Comment 2	Comment 3
50	03-Jun-13			Not known	Not Known	For	More relaxed and safer for shoopers	better signing required	
54	24-May-13			?	Ex-resident	For	Reduced rat runners who don't stop	Better directions (see below) and perhaps making free parking available for a period might encourage shoppers back	
57	08-May-13	Borough Pk Rd	TQ9 5XW	Totnes	Resident	For	more pleasant experience when out shopping	signing could be improved promote town as ped friendly	
61	07-Jun-13	Church Road		Newton Abb	Shopper	For	now a pleasant shopping experience	has solved the Rat run	
62	09-Jun-13	Taunton Court			Resident	For			
63	25-May-13	Woodbrook	TQ9 5AS	Totnes	Resident	For	I see the scheme a	if old layout is reintroduced additional work needs to be done	
64	31-May-13			Totnes	Resident	For	There is a noticeable reduction in the volume of traffic and its speed, which I attribute to an absence of rat-runners through the centre of town.	I would expect the shops to do better business over the summer from tourists who are more willing to spend time in the town centre.	
65	02-May-13	High Street	TQ9 5SQ	Totnes	Resident	For	Stopped rat running	Made it safer	
72	14-Jun-13	Jubilee Roa	TQ9 5BP	Totnes	Resident	For	More pleasant shopping experience than before, and I suspect that it time it will make the town more attractive to visiting shoppers.	Trades are short-sighted not to see the potential benefit that a pleasanter shopping experience will bring.	
73	09-Jul-13	Fairseat Close	TQ9 5AN	Totnes	resident	For	has largely reduced speeding rat runners	I now stay longer to shop and talk	Make permanent

	Date	Street Name	Post Cod	Town	1Resident Visitor Trader	For /Against	Comment 1	Comment 2	Comment 3
75	24-Jun-13	High Street	TQ9 5SN	Totnes	Trader	For	Will benefit long term...More pleasnt without rat runners.... footfall same by card transactions but value of sales down due to possible buying from interent and endless recession…	Keep ETRO going for at least another 6monts as Sort signin g out the it should be ok	
77	16-Jun-13	Someset Place		Totnes	Resident	For	more pleasant experience when out shopping	more pleasant experience when out shopping	
82	03/06/201316	Brooklands	TQ9 5AR	Totnes	Resident	For	has greatly reduced the 'rat running' through Fore St/High St/the Narrows.	The much increased volume of traffic in Catherine St is regretable	
83	23-May-13				Worker	For	Reduced vehiclesd and safer	the streets are generally full of other shoppers whenever I venture out	
85	19-Jun-13	South Street	TQ9 5DZ	Totnes	Resident	For	Reduced Rat run musch safe with no los of footfall	Better signing required	
88	20-May-13	High Street	TQ9 5SN	Totnes	Resident	For	Become nuch safer	Shoppers and peds more relaxed should over time more will apprecate	
89	08-May-13	Culverdale	TQ9 5UE	Totnes	Resident	For	such a greatly improved experience for pedestrians.	Make the street safe for pedestrians and they will stick around and shop	
90	13-Apr-1302-S			Not known	Not Known	For	Numbe of cars may increase over time	Speeds have increased	regioster my support
93	25-Jun-13	Follaton	TQ9 5NB	Totnes	Resident	For	the town a much more attractive place to come to	Any downturn in business at the moment in Totnes is happening all over the West Country, in fact all over the country. The economic climate, and meteorological climate have both had an influence over the last few months.	

	Date	Street Name	Post Cod	Town	1Resident Visitor Trader	For /Against	Comment 1	Comment 2	Comment 3
96	24-May-13	Maudlin Road		Totnes	Resident	For	As someone who uses the HIgh Street a lot I think that the recent reverse flow has been of enormous benefit to the town centre, it is safer, less noisy	Resulted in reduced rat running	
98	09-Jul-13	High Street	TQ9	5PB	resident	For	Rat running reduced so cars now faster	3 new shops just opened	Continue ETRO
101	01/07/2013 09/07/2013			Totnes	Resident	For	On the whole I support the new road layout, please keep it. But please support traders!	The work to the high street earlier in the year, a massive increase in internet shopping and the poor weather all have their part to play 'perceived' trade slow down not just the new layout	
109	24-Jun-1321-S	Dukes Road		Totnes	Resident	For	more pleasant now rat runners have been removed	Trade wiil improve long term	Don't believe it is more dangerous as suggested by shared space campaigners
116	07-Jul-13	Culverdale	TQ9 5UE	Totnes	Resident	For	it is a work of genius	Trades are not discount the probable explanation of poor shop takings is general economically weak state	Improved car parking signs and signs for peds
119	03-Jul-13	Plymouth Road		Totnes	resident	For	1. Shared Space	2.As it is now	3. Back to square 1
120	27-Jun-13	courtfield	TQ9 5RG	Totnes	resident	For	How much better the environment is, less traffic more inclined to visit.	Congestion is no worse than the last 18yrs	Compromis ebewtween full pedestriansatio n and old system.
121	02-Jul-13			Not known	Not Known	For	Slashed rat running	more pleasant experience when out shopping	Continue the scheme
123	09-Jul-13	Southcote Orchard	TQ9 5PA	Totnes	resident	For	shopping in Totnes Town Centre is much better with less motorised traffic	if there is a slow down in retail trade, it is due to the recession	I would urge you to maintain the experiment for the rest of the summer at least.

	Date	Street Name	Post Cod	Town	1Resident Visitor Trader	For /Against	Comment 1	Comment 2	Comment 3
127	09-Jul-13	Fairseat Close	TQ9 5AN	Totnes	Resident	for	much better	Can drive and access shops if required	I now spend morer tome and monet in town
128	09-Jul-13			Totnes	Resident	For	much safer and quieter	Has made huge differnce	
134	09-Jul-13	Someset Place	TQ9 5AX	Totnes	resident	For	Safer and easier for peds	access maintained	no loss in footfall
136	09-Jul-13	Oakland Road		Newton Abb	Shopper	For	the changes are positive and more welcoming to the visitor.	Full pedestrianise would be better	I'll not come back if you revert to old layout.
143	10-Jul-13			Not known	Not Known	For	As ped I find the new system better	It is to earlier to end ETRO	Better than no right turn idea which I had concerns about
144	10-Jul-13	Somerset Place		Totnes	Resident	For	much improved more vibrant more pleasant and healther	Other reasins for poss loss of trade throi some traders are up	better signage required
145	10-Jul-13	Fore st	TQ9 5DA	Totnes	Resident	For	really enjoying the new system, quiter & no boy racers at night	Reduced number of drivers driving the wrong way	trade also down to economy
146	10-Jul-13	Fore st	TQ9 5DA	Totnes	Resident	For	really enjoying the new system, quiter & no boy racers at night	Reduced number of drivers driving the wrong way	trade also down to economy
148	11-Jul-13	Windmill Down Fa	TQ9 7RY	Totnes	Resident	For	makes the road safer to a huge degree	has massively improved the atmosphere	has made me feel much happier as a pedestrian
151	12-Jul-13			Not known	Not Known	For	probably best left as it is at the moment if it stops traffic driving up the town.		
154	12-Jul-13	Sparrow Road	TQ9 5PR	Totnes	Resident	For	Much more pleasant to shop now	keep right turn from High st to Plymouth R0ad	better signing required to car parsk and for peds from Car parks
155	12-Jul-13	Sparrow Road	TQ9 5PR	Totnes	Resident	For	Much more pleasant to shop now	keep right turn from High st to Plymouth R0ad	better signing required to car parsk and for peds from Car parks
156	12-Jul-13			Not known	Not Known	for	It is much safer for peds and much more pleasant to spend time in the streets	There are many pedestrianised streets in towns and cities throughout the UK and especially on the continent.	I would much prefer the entire street to free of any traffic except for emergency vehicles and Bob the Bus.
158	15-Jul-13			Totnes	Resident	For	Much more pleasant to walk down High St	I would not like it to revert to the old way!!	

	Date	Street Name	Post Cod	Town	1Resident Visitor Trader	For /Against	Comment 1	Comment 2	Comment 3
159	16-Jul-13	Totnes Down Hill		Totnes	Resident	For	much better, traffic is slower and drivers are more courteous.	poor trade is not due solely to the trial scheme.BUT may well have had an impact at first	Trades should be looking at what they are selling in these hard times
160	17-Jul-13	Totnes Down Hill		Totnes	Resident	For	much safer and enjoyable for peds	has dramatically reduced flow thro town centre	keep new layout
162	21-Jul 1301-A			Totnes	Resident	For	..it has become a safer and more pleasant place to live.	need more shops which serve residents and shoppers,	online survey was removed as ETRO was in lead with 50% (21Jul13) 1Aug13 (52% to keep ETRO)
163	23 Jul 1302 Ap			Littlehempst	Shopper	For	Present diversion working perfectly	Safer and rat run has subsided	in general the parking spots are all filled as usual
164	23-Jul-13	Leechwell Street	TQ9 5SX	Totnes	Resident	For	Rat running has stopped	small price to pay for the peace and relaxation for pedestrians using the street now	Access is still possible - just a little less convenient
165	22-Jul-13	Bramble Close	TQ9 6GA	Dartington	Shopper	For	Much nicer and less dangerous as ped and driver		
167	09-Aug-13	Farewell Road		Totnes	Resident	For	Pedestrians can enjoy the high street now that the rat running has stopped.	Deliveries to the shops are much easier and without causing jams and traffic fumes.	Footfall in my perception has actually improved and will continue once people spread the word on the improved shopping experience.
168	09-Aug-13	Totnes Down Hill	TQ9 5EU	Totnes	Resident	For	The new traffic flow arrangements, (short of a full pedestrianized scheme), seems to me to be a good compromise	Walking through the town today there were large numbers of people with only a few vehicles cautiously threading their way through the pedestrians	I shop in the town the year round and am certain that the traders would only benefit from the reduction in traffic once the new arrangement has had time to "bed" in
169	11-Aug-1310-A	North St	TQ9 5NZ	Totnes	Resident	For	improved shoppers experience	shared space not required as already have with new sysytem	Perhaps remove kerbs in narrows

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170	11-Aug-13			Not known	Not Known	For	Present arrangements much better but pedestrianised would be safer and better option	Shared space is awful	
171	11-Aug-13			Not known	Not Known	For	improved shoppers experience	PLEASE KEEP THE PRESENT SYSTEM	Shared space will NEVER WORK.
172	14-Aug-1321-/	Fore st	TQ9 5NJ	Totnes	Trader	For	I like the present traffic scheme and every "punter" I have talked to also appreciates it.	The past three months of comparing figures against 2012 shows an increase every month year on year and an overall increase during that period of 55%.	I think that signage in car parks (eg maps) would help visitors. I suspect that people are coming to Totnes for the "experience" rather than serious "shopping" . Cafes and places that offer something special and unique are profiting.
174	16-Aug-13	Coplans Meadows	TQ9 6ES	Totnes	resident	for	really enjoying a less congested and polluted shopping experience	The present traffic order is for 'access only' to the town centre and the reverse-flow system is a cheap and excellent way of ensuring that this is complied with, while allowing 24 hour access to businesses and residents.	I walk into ~Totnes, several times a week, the streets are packed with people, now able to overflow onto the road, as the pavements become congested.
176	21-Aug-13	Riverside	TQ9 5JB	Totnes	Resident	For	I would like to express my support for the Experimental Traffic Order in Totnes	. I have lived here for 23 years and I think this is the best arrangement there has been so far.	

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177	21-Aug-13			Not known	Not Known	For	I am now able to enjoy the experience of shopping in Totnes	Although there are still too many vehicles emitting their obnoxious fumes, the present situation is much better than when the "rat run" was the norm	I would like to see an even greater emphasise on pedestrian priority.
178	21-Aug-13	Broom Park	TQ9 6JR	Dartington	Resident	For	I am very much in favour of keeping the traffic to a minimum in Totnes Fore Street and High Street	For parents with pushchairs, children, groups of young people and the elderly there can be no question as to if there should be traffic or not.	Anyone now watching the street can see how pleasant, quiet, relaxed and enjoyable it is and how nearly everyone WALKS IN THE STREET!
179	23-Aug-13	Belmont Terrace	TQ9 5QB	Totnes	Resident	For	I'm writing to express my support for the continuation of the Order	We now have the 'shared space' that Reopen Totnes are calling for. Pedestrians have 'established dominance' during the shopping day, and so we and vehicles can share the space equally. 3. I feel that the 'shared space' which Reopen Totnes are calling for is a diversion.	4. A vital first step towards putting people first in the centre of town has been achieved. The calmed streets appear to me to have just as many people as before, and rather more on occasions. However, because vehicles are not nearly so obtrusive
182	09-Apr-14			Not known	Not Known	For	improvement for a cyclist,walker & car driver	The 'Rat Run' has been reduced significantly	Better with left lane outside Hospital
183	05-Apr-14			Dartington	Shopper	For	More attractiove place for shoppers	Ped no. appear to be same. If takings down mybe due to econ climate	Poss sign lower Fore st as Shared space required
184	06-Apr-14			Not known	Not Known	For	Personally I think it's a great improvement for pedestrians	I think it's not the final solution - It's confusing for motorists	no further decisions made until the results of econ survey are in
185	02-Apr-14				Not Known	For	Safer	more pleasant to walk up Fore St	

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186	02-Apr-14	Bowdon House	TQ9 7PW	Totnes	Shopper	For	Prefer new layout	Less throgh Traffic	Better signing of roundabout could be achieved
188	02-Apr-14	Northgate	TQ9 5NX	Totnes	Resident	For	More attractiove place for shoppers	The only scheme that has worked to reduce rat runs	Survey of shops to see impact of new arrangement
189	02-Apr-14	Bridgtown		Totnes	Resident	For	As shopper, walker with pram feel safer due to reduction of fast traffic	more inclined to wander thro town centre	
191	02-Apr-14			Stoke Gabrie	Shopper	For	Safer , with slower, quiterand more considerate traffic	Given narrow pavements feel happy to bring kids	Support shared space idea
194	10-Apr-14			Not known	Not Known	For	Not best but I support continuance	Major cross roads not being addressed	Tinkering intern routes help peds but not traffic around town
195	10-Apr-14	South Street		Totnes	Resident	For	I vastly prefer the new arrangement	There's much more foot traffic, it's much more comfortable walking around town	road signage in Totnes is TERRIBLE. Particularly to car parks
196	10-Apr-14	Staple		Dartington	Shopper	For	I vote we keep this system. The main street is more ped friendly	The 'new reversed' LO is a great improvem't on the previous LO	Safer to shop - we only have to look one way & there is less traffic
197	10-Apr-14	Droridge	TQ9 6JQ	Dartington	Not Known	For	I really like the new system.	Better for peds & hardly effects my occasional use of the rd as a motorist at all.	Believe reported impact on traders is temporary

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1	13-May-13	High Street			Trader	Against	Loss of trade. Poor signing	Congestion- Coronation roundabout and edge of town	
2	05-Jun-13	Bow Road	TQ9 7HP	Tuckenhay	Shopper	Against	Congestion on Coronation Road	Dangerous on 7 star roundabout	Not so safe for peds
3	12-Apr-13	Fore st	TQ9 5NJ	Totnes	Resident	Against	Negative impact on Totnes and trade	Congestion and increase dangers	Vehilces being driven the wrong way
4	03-Jun-13	High Street			Trader	Against	Loss of Trade	Will force shop to close	
5	24-May-13			?	Not Known	Against	Reduced footfall, bad for traders	ridiculous	
7	29-May-13	Carr Lane	TQ72PU	Slapton	Shopper	Against	Trade down as difficult to access shops	FOI on accident data requested	
8	31-May-13			Totnes	Resident	Against	There is now no longer passing traffic	Putting off shoppers due dificulties and congestion	independent traders in the High Street should have last decision
13	25/03/2013 30/05/2013	High Street		Totnes	Trader	Against	Impact on visitor numbers during day and evenings	Rat run did not exist. Now dangerous, confusing, poor signing and increased congestion	Look at parking fees
17	28-May-13			?	Not Known	Against	Difficult to get into Fore St due to congestion	Close High st on Fri market day	
20	31-May-13				Resident	Against	Diifficult to shop for disable person who is driven around	Increased congestion	
21	08-May-13	High Street	TQ9 5PB	Totnes	Trader	Against	loss in trade	dangerous for preds and vehicles	
23	28-May-13	courtfield		Totnes	Resident	Against	I have been forced to desert the town and go elsewhere. The town is dead	Not green with longer routes and diffficult due to congestion	
24	01-Jun-13	Brooke Farm Forge	TQ4 7PQ	Paignton	Bob the Bus	Against	Increased congeston on Coronation Road	inconvenient for old people using the bus and increase stress	
29	26-May-13			? Totnes	Worker	Against	Traffic by-passing town and making routes into and out of Totnes harder	Scheme is drinving people away so trade is down	
33	26/03/2013 27/05/2013			Totnes	Trader	Against	Is going to be as it is going to affect the businesses	Observation congestion	

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36	24-Jun-13	Carrions		Totnes	Not Known	Against	Ghost town	Return to old layout	
37	07-Jun-13	High Street	TQ9 5NP	Totnes	Trader	Against	impact on visitor numbers	Confusion on how to drive thro town	
38	30/06/201320	High Street	TQ9 5SI	Totnes	Resident	Against	Not safe	email 2 :It is true that the pedestrian experience is improved in the town as a result of a decrease in the volume of traffic. However, against this we have to balance the pollution and frustration caused by slow-moving traffic jams on the perimeter roads generated by the ETO.	email 2 :In the longer term the town desperately needs an overall A385 highways strategy which will rationalise the flow of traffic through a simplified system at Redworth Junction and Coronation Road Roundabout, together with traffic reduction measures such as park-and-ride,
41	18-Apr-13	Priory Drive	TQ9 5HU	Totnes	Resident	Against	Dangerous drives driving thr wrong way and journey time to work doubled (Congestion)	Bad for trader	
44	30-May-13			Not known	Trader	Against	the new one way system in the High Street isn't working, and is detrimental to the town as a whole.	In my opinion you should revert to the former system, as it was easier to park, without having to go all the way around the town to find a short stay spot.	
45	28-May-13	High Street		?	Worker	Against	confussing diffficult to find parking	Lost vibrancy of town peoople staying away	
46	23-May-13				Not Known	Against	Congestion is worse.. Harder for disable and need to go around agin…visitors will nort stop	Hospital used as short cut…higher speeds in High st…better signing req'd	
47	23-May-13				Not Known	Against	Congestion is worse.. Harder for disable and need to go around agin…visitors will nort stop	Hospital used as short cut…higher speeds in High st…better signing req'd	

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48	29-May-13	Boo Down	TQ13 7LZ	Landscove	Not Known	Against	Lost vibrancy of town	Made it difficult to nip to shops	
51	28-May-13			?	Trader	Against	Killing town	Reinstate old layout	
52	23-May-13	High Street		Dartington	Trader	Against	Reduce car flow to any area and you reduce people passing through it. Reduce people passing though and you reduce footfall. Reduce footfall and you reduce revenue and atmosphere.	The significance of the route up through the town is so fundamental to the prosperity of the town, cutting it off is the equivalent of cutting off a persons legs. It has a crippling and life threatening effect.	
53	26-May-13	Bridgetown		Totnes	Resident	Against	causing congestion it is making the roundabout at the bottom of the town lethal	Affecting trade as foot fall has reduced	
55	26-May-13	High Street			Trader	Against	Trade down had to lay-of staff	Killing the town	
56	28-May-13			?	Ex-resident	Against	Town is losing its life	Has drievn people away	
58	23-Jun-13			Totnes	Resident	Against	The rat running never caused a problem	Congestion on Station rnabout	
59	26-May-13	Bridgetown		Totnes	Resident	Against	huge congestion problem around the outskirts of the town	difficult to get anywhere without having to allow extra time to sit in traffic queues to get through Totne	
60	27-May-13	Plymouth Road	TQ9 5NA	Totnes	Resident	Against	Footfall down and duifficult to pop and shop	Congestion and death of town	
67	02-Jun-13				Not Known	Against	Death of Town		
68	25-Apr-13	Bridgetown		Totnes	Trader	Against	Loss of trade you to loss of traffic	Congestion and polution around town	
69	04-Jun-13	Smithfields	TQ95LR	Totnes	Resident	Against	Unsafe and confusing Fore Peds at bot of Fore St	Congestion Coronation Rd and lower town	
70	11-Jun-13	Manor Way	TQ9 5HP	Totnes	Bob the bus	Against	Increased congestion on Coronation Road	Increased traffic on Station Road has made it more dangerous to residents . Also narroow or no footways	

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71	04-Jun-13	Weston Lane	TQ95UN	Totnes	Resident	Against	Causing Chaos at times when there was not a problem		
76	04-Jun-13	Avalon	TQ10 9LY	Avonwick	Not Known	Against	Pain due tocongestion		
80	12-Jun-13	Old Forge Cottage	TQ9 7SJ	Harberton	Trader	Against	Cogestion is a nightmare	No longer shop her because of the parking situation	
81	03-Jun-13	High Street	TQ9 5SQ	Totnes	Trader	Against	Confusing for visitors looks as if town is closed	Will close business	
87	21-Jun-13			Not known	Worker	Against	Fppt fall down frustrating to shop	Congestion on Station rnabout	
91	27-May-13			?	Not Known	Against	Safety vechicle speed down hill in Fore St	Danger to peds as not use to looking up hill	
92	25-May-13			Totnes	Bob the Bus	Against	Driving trade away	Poor signing meeans peple think town centre is closed	
94	15-Apr-13	Clay Park	TQ9 6RH	Stoke Gabrie	Commuter	Against	Dangerous drives driving thr wrong way and journey time to work doubled (Congestion)	Cannot acces Fore st legally	
95	31-May-13		TQ97ES	Cornworthy	Resident	Against	confusing for visitors and congestion on Coronation road / roundsbout	Lorries have difficulty turning up and down hill in Station Road	
97	26/05/2013 25/06/2013	South Street		Totnes	Trader	Against	accident waiting to happen... cars lost, ... traffic jams everywhere	Safety Vehicle going wrong way and peds looking wrong way	Car parking spaces avail even on bank holiday
99	27-May-13			?	Shopper	Against	Confuisng and inconvenient	Will harm town	
100	06-May-13	Fore st	TQ9 5RP	Totnes	Trader	Against	Safety peds looking wrong way on fore st	cyclist and skateboards using slope to free wheel and gain speed	
102	29-May-13	Station Road			Resident	Against	Safety and speed	Congestion plus parking wrong side of road on Fore St to get children out of Child seat	
103	14-May-13	High Street			Trader	Against	affecting trade	Signing not clear	
104	30-May-13	High Street	TQ9 5NP	Not known	Trader	Against	observed a significant reduction of cars on the High Street.	Visitors are confused by the new traffic flow	

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105	02-Jun-13	bow Creek	TQ9 7HP	Tuckenhay	Shopper	Against	Danger at 7 star roundabout	inconvenient to access Fore street by car	
107	30-Jun-13	High Street	`	Totnes	Trader	Against	Totnes has bucked the national decline, until this year. As result of ETRO	justification on accidents is wrong accidents as vehicle numbers has increas3ed so acidents per car are down.	
108	02-Jun-13	Bridgetown		Totnes	Resident	Against	Totnes traffic has always been bad - but now it is ridiculous.	Put a "no entry" sign where the traffic from Paignton turns left over the old bridge towards the Plains and at least you'll ease things for us locals - and thereby keep ALL through traffic off the Plains and the bottom end of Fore Street.	
110	01-Jul-13			Not known	Shopper	Against	I find the current road layout deeply irritating and feel that it is detrimental to Totnes.	I have seen numerous near misses when cars attempt to drive up Fore Street and again on the roundabout at the Plains.	
111	06-Jun-13				Not Known	Against			
112	30-May-1303-			Not known	Worker	Against	Losss of business	traffic jams & more dangerous for peds	Serrious ped accident on 2nd Apr 14. this has not happ'd before
113	30-May-13			Not known	Bob the Bus	Against	Passengers do not feel safe getting off the bus outside The King William pub, which is the closest the bus now gets to the Post Office in Fore Street.	Passengers missing bus because it is rarely on time, and then use other service if there is one available, and not return to our service because the other services are not so delayed as they do not access the town centre.	

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115	26-Jun-13				Trader	Against	Grid lock ambulance could not get through so drove up Fore Street (twice)	Accideny waiting to happen on Fore St . Station Rd junction with large vehicles trying to turn into upper Fore St	
117	05-Jul-13			Not known	Commuter	Against	Cogestion is a nightmare	Traffic is forced on to ONE roundabout	Should be able to drive up For e St & High St
118	03-Jul-13			Ipplepen	Shopper	Against	No prior signing about new layout	Made congestion worse	
124	09-Jul-13	Manor Way		Totnes	resident	Against	Traffic now faster and more dangerous in Station rd	Far less people in town	Please reverse the traffic
125	09-Jul-13			Not known	Not Known	Against	Not worked	Not an improvement	
126	09-Jul-13			Not known	Not Known	Against	Not worked	Not an improvement	
129	09-Jul-13				Not Known	Against	Please revert to old layout	Congestion is now worse everwhere	
130	09-Jul-13				Worker	Against	Congestion at any time is worse	Less peds and cars mean less trade ..given up finding way to shops	hasle to shop to go around
131	09-Jul-13				resident	Against	Revert back to old layout	Congestion	Turn of ped lights and replace with bridsge (nr Police St)
132	09-Jul-13				resident	Against	Revert back to old layout	Congestion	Turn of ped lights and replace with bridsge (nr Police St)
133	09-Jul-13				Not Known	Against	Revert back to old layout	Disastrous for traders	
135	09-Jul-13			Not known	Not Known	Against	Please put it back to how it was!		
137	09-Jul-13			Not known	Not Known	Against	Revert back to old layout	Will ease congestion and make safe on Station Rd	NO Entry signs and bas access putting off visitors
138	09-Jul-13			Not known	Not Known	Against	Revert back to old layout	Will ease congestion and make safe on Station Rd	NO Entry signs and bas access putting off visitors
139	10-Jul-13				Not Known	Against	Conestion causing frustration	Adverse affect on trade & confusiing for peds	Please reverse the traffic
140	09-Jul-13			Not known	Shopper	Against	traffic flow confusing	potentially dangerous for peds who expect flow in one direction	Makes the town feel cut off

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141	09-Jul-13	Birchwood Close	TQ9 5GB	Totnes	resident	Against	Congestion will result in emergency services not getting thro	ped accidents in favour of polluting everyone else!	Please reverse the traffic
142	09-Jul-13	Plymouth Road	TQ9 5NA	Totnes	resident	Against	absolute havoc, congestion, more dangerous	Trade and footfall down	reverse ETRO and add more humps pinch pts
147	11-Jul-13	Trade Winds		Berry Pomer	Not Known	Against	never encountered such traffic chaos in Totnes	I have also observed several "near misses" near the Plains,as drivers	unless the old system is re-instated, the present system is a time bomb
149	11-Jul-13			Not known	Not Known	Against	The current scheme is confusing for residents & visitors	is having a detrimental effect on town centre trading	Traffic (pedestrian and motor) is the lifeblood of the town centre
150	12-Jul-13			Not known	Not Known	Against	The huge disruption in traffic flow around Totnes now is horrendous.	Hospital car park is being used as a short cut	return to the orignal layout
152	12-Jul-13			Not known	Not Known	Against	It is only a matter of time before a serious accident occurs.	there is an air of uncertainty regarding this new scheme	cars still entering the high street the wrong way at the 7 stars
153	12-Jul-13	Elmhirst Drivve		Totnes	Resident	Against	Grid lock , worse in half term	Revert back and make this the offical rat run	or pedestrianise the whole of Fore and High St and build a by-pass
157	13-Jul-13			Not known	Not Known	Against	Confusing and deters visitors and shoppers	Not safe speeds and turning I stattion road	signing is poor
161	17-Jul-13			Not known	Not Known	Against	is causing a lot of congestion,	a build up of traffic in streets nearby	is putting people off from using the High street

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175	21-Aug-13			Totnes	Resident	Against	much improved experience in the High street but at costs to the residents of St. Katherine's Way, Heath Way and Cistern Street, to users and drivers of Bob the Bus, to staff at Totnes Hospital whose car park has now become a rat run, to ….	extremely poor signage and a road system that is now inherently confusing and more congested than befor	However, traffic throughout Totnes will remain problematic until the stretch of road from the east end of Brutus Bridge to KEVICC is changed so that traffic flows, if not freely, at least fairly smoothly. It is the congestion there that drives people to rat-run through the town, and is beginning to put visitors off coming here. A
181	23-Aug-13	Fire Station		Totnes	Trader	Against	Although Traffic flows within the locality of the fire station are generally poor, particularly at peak times, the ETO has certainly had an increased impact upon this; resulting in delayed response's for emergency cover for the RDS personnel who crew the emergency response vehicles at Totnes.		
187	02-Apr-14			Not known	Not Known	Against	Does not work, devides town in 2, confusing discourages visitors	Nat entrance is bottom of Fore st so shops going out of business	Use shared space and no right turns top. Make them use inner by-pass
190	25-Mar-14			Totnes	Trader	Against	Tennant to businesss struggling to pay rent	Diversion not working for traders	Diversion discourages visitors to pass by and on going to

	Date	Street Name	Post Cod	Town	1Resident Visitor Trader	For /Against	Comment 1	Comment 2	Comment 3
192	10-Oct-13			Hertsfordshi	Shopper	Against	Holiday 1 or a year in Totnes. Massive mistake loosing tourists	Cars travelling both ways in lower Fore St and peds not aware of change	Congestion on on Morrisons roundabout
198	10-Apr-14	Beenleigh	TQ9 7EF	harbertonfor	Shopper	Against	Stop this experiment.	discourages any spontaneous or unplanned shopping at fore street	Putting me of using the shops

	Date	Street Name	Post Cod	Town	1Resident Visitor Trader	For /Against	Comment 1	Comment 2	Comment 3
31	27-Mar-13				Not Known	Clarificationw			
66	30-Jun-13			Stoke Gabrie	Shopper	Only if	scheme has improved safety for pedestrians in Fore Street and High Street due to the reduction in traffic….. The shopping experience is thus much more pleasan	Support if congestion solved	
74	15-Apr-13			?	Not Known	Observations	Signing mprovement req'd to prevent cars going against one way sys		
78	19-Mar-13	Apple Lane	TQ95SQ	Totnes	Trader	Clarificationw	Please call back		
79	29-May-13				Trader	Observations	Figure down	?	
84	25-Mar-13			Totnes	Trader	Clarificationw	Worried about delievry lorries being banned		
86	27-May-13				Bob the bus	Observations	Passeneger bus numbers down	running late due to route length and congestion	
106	02-Jun-13			Totnes	Resident	Observations	Increased congestion	Suggested sign improvements	
114	16-May-13				MP	Clarificationw	?	?	
122	09-Jul-13	Southcote Orchard	TQ9 5PA	Totnes	Resident	Observations	Delightful for peds	slightly confusing and circuitous for motorists wanting to access the town centre	congestion on Station Road corridor… something sensible needs to be done at Redworth Junction
166	08-Aug-13		TQ5 0HG	Brixham	Shopper	Not Sure	High Street traffic is detrimental to a pleasant shopping experience	Complete pedestrianisation , - apart from delivery vehicles. ..,or at least a partial system should be introduced	Traders may iniatilly be agianst as they have in other towns but would not want it removed eg Brixham

	Date	Street Name	Post Cod	Town	1Resident Visitor Trader	For /Against	Comment 1	Comment 2	Comment 3
173	18-Aug-13	Fore st	TQ9 5NJ	Totnes	Trader	Only if	As a RESIDENT of Totnes, I find the experimental traffic system WONDERFUL	As a TRADER in Totnes, my business is similar to last year, so no complaints there. I believe that most Traders' problems are being caused by unfair internet competition, the general economic climate, and the weather	I would like the ETO to be made permanent, subject to improvements to address the complaints of other traders. …………………
180	27-Aug-13			Not known	Not Known	Not Sure	Heard that right turn ban is a possibiulity THIS IS UNSAFE	The new proposed traffic system would results in a massive increase in the number of cars needing to turn right at the top of Cistern Street into the A381 and it will make this junction incredibly dangerous – more cars turning right will	
193	23-Sep-13	4 Coleridge Ho	TQ7 2JG	Chillington	Shopper	Not Sure	No strong opinion but traffic worst around town	DO NOT introduce right turn ban into Plymouth Road	