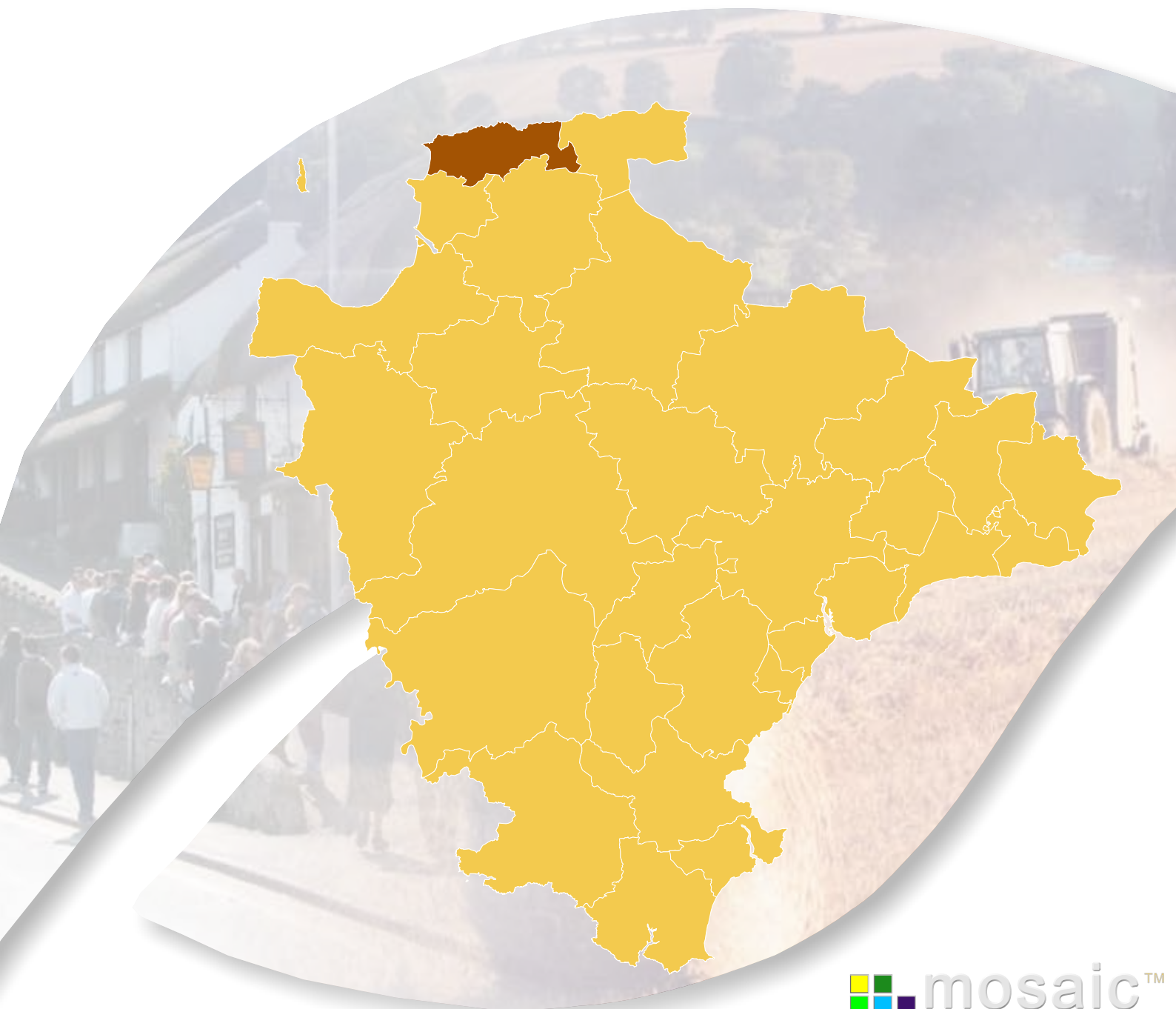


Ilfracombe

Devon Town Mosaic Profile

November 2009



Ifracombe Mosaic Profile

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Introduction

A distinctive feature of Devon is the large number of market and coastal towns spread across the county. Across Devon the relationship between towns, villages and the surrounding countryside is complex. Devon's towns provide a wide range of facilities and services for people and communities in the surrounding hinterland, including employment, education and training, shopping and leisure facilities. They are vital to the well being of surrounding communities, as they offer a variety of services to their hinterland.

To understand these areas in more detail this profile, one of 29 covering the area administered by Devon County Council, has been produced by the County Council's Strategic Intelligence Unit. The profile provides an overview of lifestyle characteristics identified within the Mosaic dataset. Such characteristics include the age, wealth, housing, occupation, health, education, crime and the environment.

The profile is structured around a series of maps, graphs and tables to illustrate the Mosaic makeup of the area. It is intended that this profile will be viewed alongside the "Devon Town" baseline profile to provide a picture of what life is like in each Devon Town.

Ilfracombe

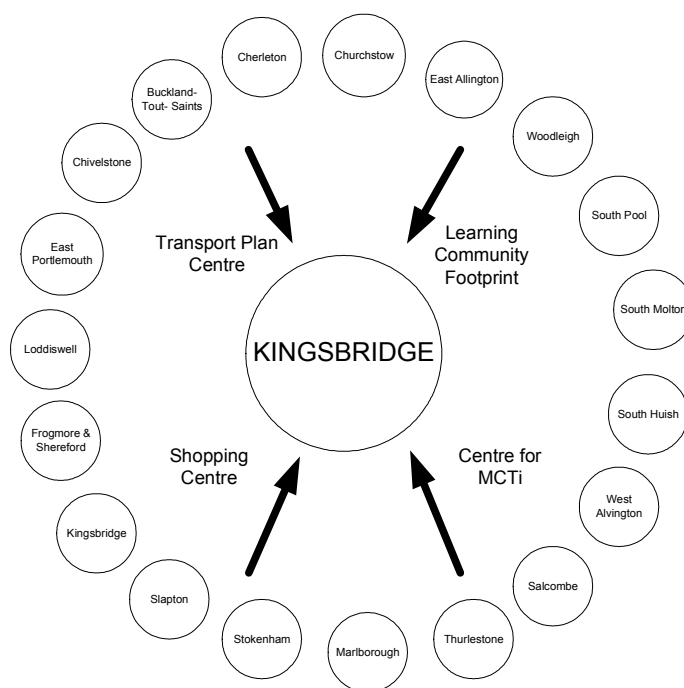
The Mosaic profile shows more than a quarter of households in the rural category and another quarter in the group most associated with close knit communities in late 19th century housing, built to be near local services and employment – just over a fifth of households are in the better off elderly category.

Identifying Devon Towns

The main factor that decides a town's hinterland is provision of services; the place that the hinterland looks to in order to provide the things it needs to survive. In order to identify the 28 Devon Towns, analysis of the following services and other relevant factors have been taken into account:

- Local Travel Plans – which are based on public consultation and map local travel patterns, the majority of which are made up of short journeys in and around local communities as part of people's daily lives.
- Shopping catchment areas – which are the service most frequently accessed by people.
- Learning Community catchment areas – which have a major influence on where people look to for services. Learning Community catchments do not always follow district or even county boundaries, but are based on a collection of feeder primary schools.
- Market and Coastal Towns Initiative areas - The Market and Coastal Towns Initiative was started after recognition that the health of a market town is vital to the well being of its hinterland, and that many of Devon's market towns were in need of regeneration. It is a Central Government initiative, administered by the RDAs. Over half of Devon is included in the Market and Coastal Towns Initiative.
- Parishes - The boundary definitions are shown in terms of parishes, as they are traditionally the smallest area used for 'clustering'.

The diagram below is an illustration of how this works for one Devon Town: Kingsbridge.

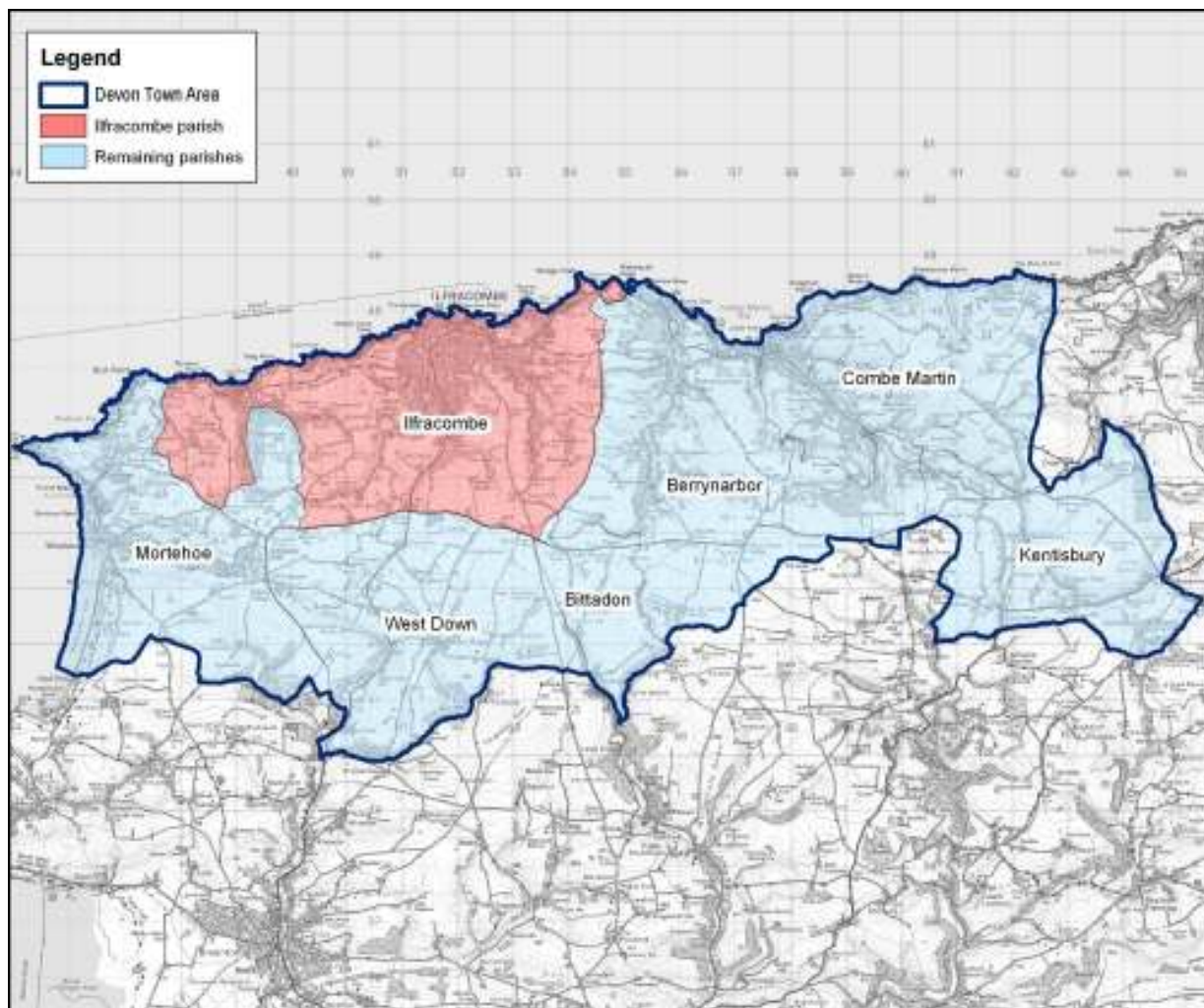


Exeter also provides a similar or related “market town“ function as well as being a sub regional centre with a larger sphere of influence.

Area definition

The “Devon Town” areas have been defined as aggregations of parishes. The following parishes make up the Iffracombe “Devon Town” area:

Berrynarbor	Bittadon	Combe Martin	Iffracombe
Kentisbury	Mortehoe	West Down	



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Each “Devon Town” area comprises a centre (coloured red) and its surrounding hinterland. For the purposes of utilising the Mosaic data, analysis has been included at a ward level within Iffracombe parish and for the surrounding hinterland at a parish level.

Comparison data has been included within various tables and graphs. Where reference is made to Devon this refers to the area administered by Devon County Council. Where reference is made to national this is the UK.

Within this profile the Mosaic dataset has been analysed by the number households within a given area.

Background

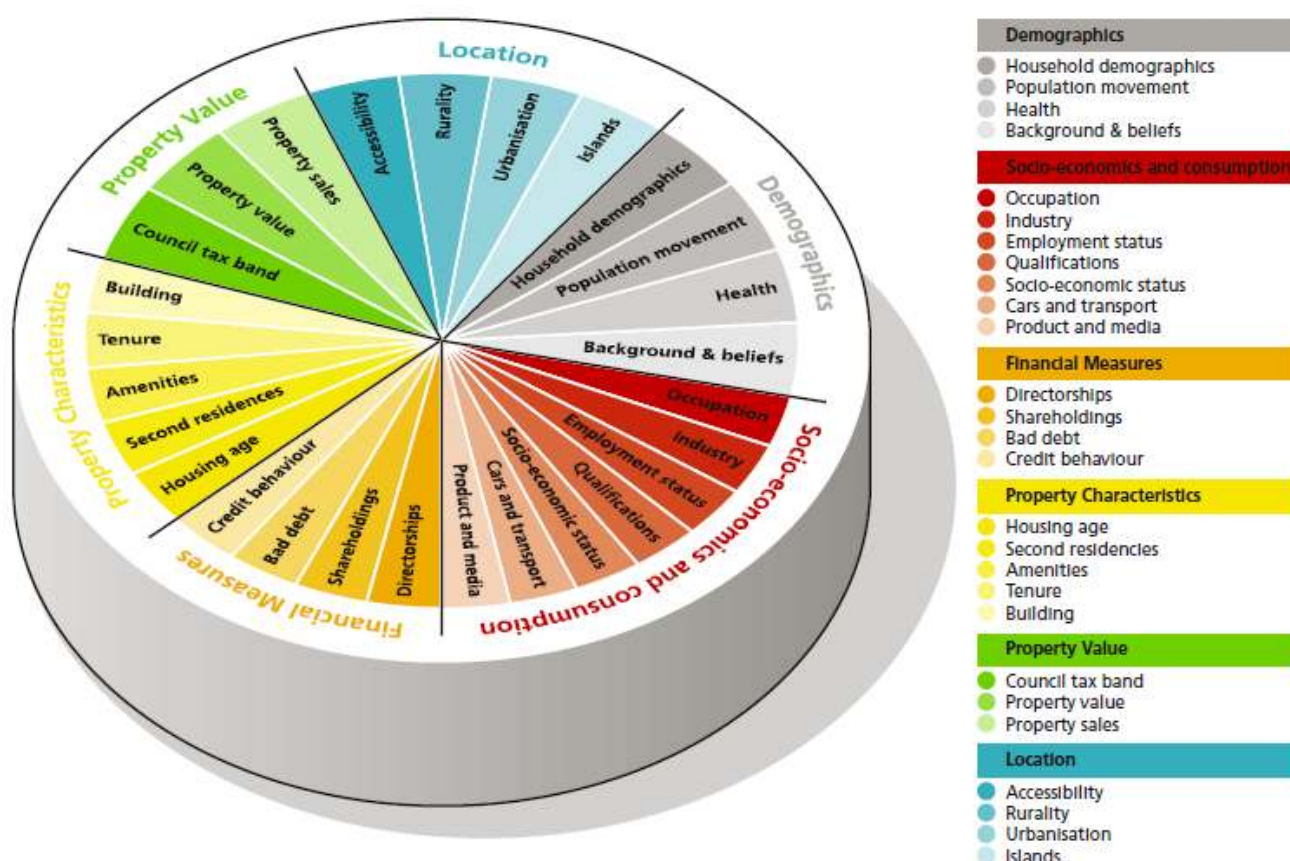
Mosaic Public Sector is designed to identify groupings of consumer behaviour for households and postcodes. The methodology used is unique to Experian, and has been redefined during many years of creating classifications using data from different sources and different levels of geography. Around 54% is sourced from the 2001 census and 46% includes the edited Electoral Roll, Experian Lifestyle Survey information and Consumer Credit Activity, Post Office Address File, Shareholders Register, House Price and Council Tax Information and ONS local area statistics.

Mosaic classifies postcodes into 11 Mosaic Groups and then subdivides them further into 61 detailed Mosaic Types. The Mosaic codes will be used and their descriptions provided where relevant, with the basic key features for all codes included in the appendices.

In each type there are a number of key features which make each category distinctive and are useful to bear in mind when devising communications or treatment strategies targeted at them. These are subjective and are intended to highlight key issues rather than to be comprehensive.

Mosaic at household level is being used for 2009. Not every one of the county's 348,000 households will match exactly to just one of 61 different Mosaic Types. The description should be recognised as "ideal types", examples to which individual cases approximate only with various degrees of exactness.

The diagram below illustrates the data sources within the Mosaic UK dataset.



Further information can be found on the Experian website – www.business-strategies.co.uk

Summary

The Ilfracombe Devon town area comprises the main town and a surrounding hinterland of 6 parishes, a mix of both inland and coastal: Berrynarbor, Bittadon, Combe Martin, Kentisbury, Morteheo and West Down.

Ilfracombe is a seaside resort on the north coast of Devon. A large percentage of businesses are within the distribution, hotels and restaurants sector. Historically the economy was based around the sea trade and fishing, but now manufacturing is more important than these.

The largest group in the area is the rural group K which accounts for 29% of households and is higher than the Devon average. As a whole the Ilfracombe area has more than double the proportion of group D (28%) than the area covered by Devon County Council (13%).

All the rural parishes are made up mostly of group K. The coastal parishes of Combe Martin and Morteheo parish have high proportions of the elderly group J.

Within Ilfracombe parish, Ilfracombe Central, East and West wards there is a higher proportion of group D than the average for the area as a whole. There are also high proportions of group J and C.

Group C - Older families living in suburbia

Group C - comprises people who have successfully established themselves and their families in comfortable homes in mature suburbs. Children are becoming more independent, work is becoming less of a challenge and interest payments on homes and other loans are becoming less burdensome. With more time and money on their hands, people can relax and focus on activities that they find intrinsically rewarding.

Group D - Close-knit, inner city and manufacturing town communities

Group D - is comprised of people whose lives are mostly played out within the confines of close knit communities. Living mostly in older houses in inner city neighbourhoods or in small industrial towns, most of these people own their homes, drive their own cars and hold down responsible jobs. Community norms rather than individual material ambitions shape the pattern of most residents' consumption.

Group J - Independent older people with relatively active lifestyles

Group J - consists mostly of pensioners who own their homes and who have some source of income beyond the basic state pension. Many of these people have, on retirement, moved to the seaside or the countryside to live among people similar to themselves. Today many of these people have quite active lifestyles and are considered in their purchasing decisions.

Group K - People living in rural areas far from urbanisation

Group K - contains people whose pattern of living is distinctively rural. They live not just outside major population centres but also deep in the countryside, in small communities which have been little influenced by the influx of urban commuters. These are places where people with different levels of income share attachments to local communities, and where engagement with the community and with the natural environment are more important to most residents than material consumption.

Further information about the Mosaic Groups and Types are provided in the Appendices.

Analysis by mosaic group

Key Features

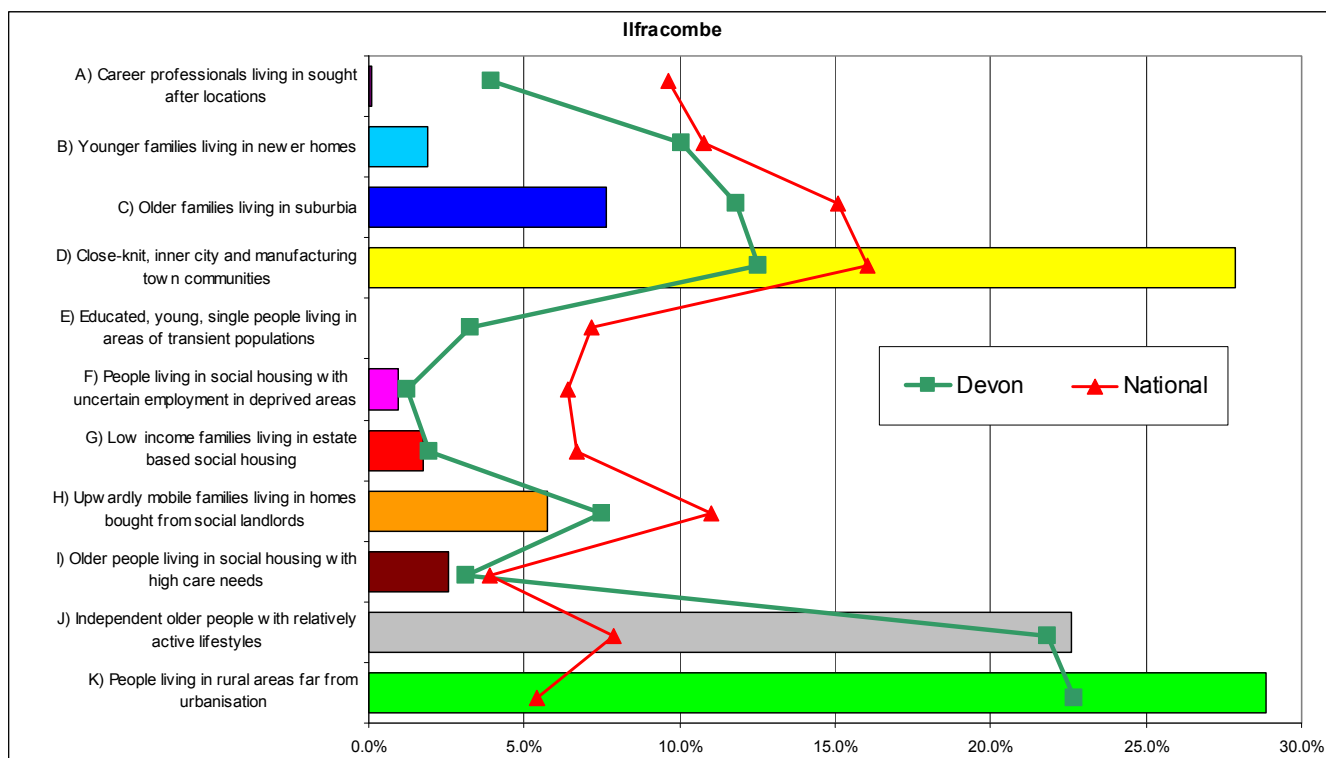
The National figures compared with Devon are higher in most groups because of the over representation of the elderly group J and rural group K in Devon.

This chart shows that group K, with approximately 29%, is the highest group in the town area, closely followed by groups D (28%) and J (23%). All three groups are more prevalent in Iffracombe than in Devon as a whole.

Whilst groups B, F, G, H and group I do not feature much overall there is still enough representation to mean that these lifestyle types could be clustered in specific places. This will be looked at later on in this document – their key features can be seen in the appendix.

Main Mosaic Groups in the Iffracombe Devon Town area.

The following graph and table show the main Mosaic Groups appearing in Iffracombe, they also show the proportions of all Mosaic Groups appearing in Devon and nationally.



Note: **Red = Prominent Mosaic Groups (> 5%)**
 Shaded = over represented in Ilfracombe compared with Devon

Mosaic Group	Mosaic Household Results		
	Ilfracombe	Devon	National
A	0.1	4.0	9.6
B	1.9	10.1	10.8
C	7.6	11.8	15.1
D	27.9	12.6	16.0
E	0.0	3.3	7.2
F	1.0	1.3	6.4
G	1.8	1.9	6.7
H	5.8	7.5	11.0
I	2.6	3.1	3.9
J	22.6	21.8	7.9
K	28.9	22.7	5.4

Source: Mosaic data 2009 - © 2004 Experian Ltd

Mosaic Groupings by ward/parish

Key Features

Ilfracombe Devon Town has a varied mix of Mosaic Groups with only group E being absent.

The three wards that comprise Ilfracombe are similar to each other in that group D dominates in all three, though the proportions are different with Central ward having 55%, East 36% and West 30%. The second most prevalent group in all three wards is group J. Ilfracombe East has 23% of Group C.

With regard to the more rural parishes all of them have at least 50% group K and Kentisbury is 100%. Combe Martin (the largest rural parish), Mortehoe and Berryarbor have high percentages of group J.

The following table shows the main Mosaic Groups appearing in Ilfracombe, it shows the proportions of households in each Mosaic Group.

Area	Percentage of Households											Total H'holds
	A	B	C	D	E	F	G	H	I	J	K	
Ilfracombe Central	-	1.3%	-	55.3%	-	3.2%	2.4%	13.7%	6.0%	14.0%	4.1%	2,075
Ilfracombe East	-	3.6%	23.3%	35.6%	-	0.8%	-	0.6%	-	24.3%	11.7%	1,109
Ilfracombe West	-	3.3%	15.7%	30.0%	-	0.1%	4.8%	8.7%	3.3%	22.0%	12.2%	2,031
Ilfracombe	-	2.6%	11.0%	41.2%	-	1.5%	2.8%	9.0%	3.7%	19.3%	8.9%	5,215
Berryarbor	-	-	0.3%	-	-	-	-	-	-	21.1%	78.7%	342
Bittadon	4.8%	-	-	-	-	-	-	-	-	-	95.2%	21
Combe Martin	-	-	2.1%	8.9%	-	-	-	0.5%	1.6%	27.4%	59.4%	1,313
Kentisbury	-	-	-	-	-	-	-	-	-	-	100.0%	109
Mortehoe	0.7%	1.5%	2.3%	3.0%	-	-	-	-	-	42.3%	50.1%	986
West Down	0.4%	2.1%	0.4%	-	-	-	-	0.4%	-	3.2%	93.6%	281
Rural Parishes	0.3%	0.7%	1.7%	4.8%	0.0%	0.0%	0.0%	0.3%	0.7%	28.1%	63.4%	3,052
Devon Town	0.2%	0.9%	1.0%	25.2%	0.0%	1.3%	1.0%	5.7%	2.8%	22.4%	39.4%	5,127
Total Households	9	48	53	1,294	0	67	49	292	145	1,149	2,021	5,127

Source: Mosaic data 2009 - © 2004 Experian Ltd

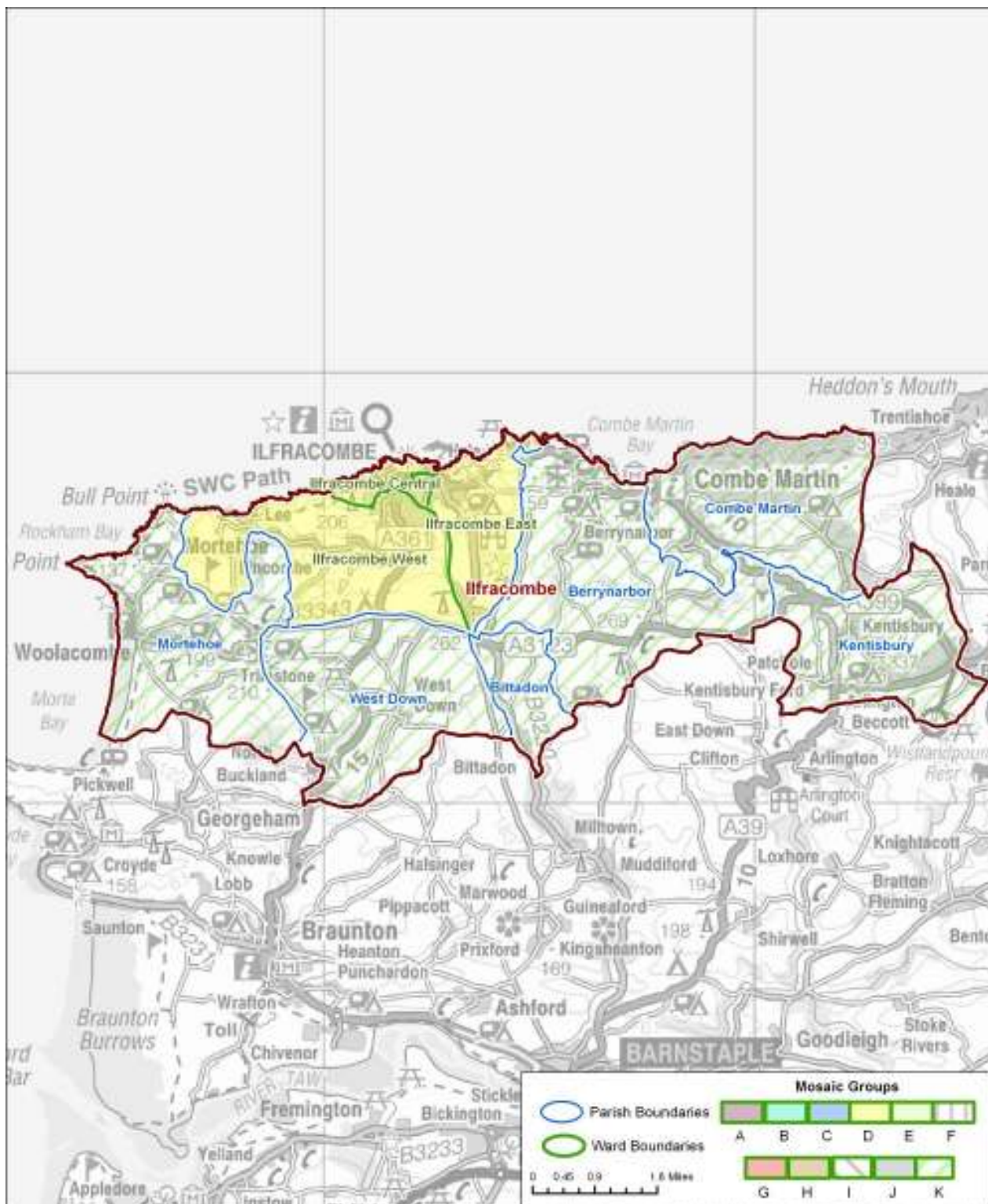
Note: Red = Predominant Mosaic Group
Blue = Significant Mosaic Group >20%

Main Mosaic Groups

Key Features

The map below illustrates that Iffracombe itself is dominated by group D but all the surrounding parishes are group K

It should be noted however that other Mosaic Groups could be present to a lesser degree; these other groups are shown later in this report in various maps, tables and graphs.

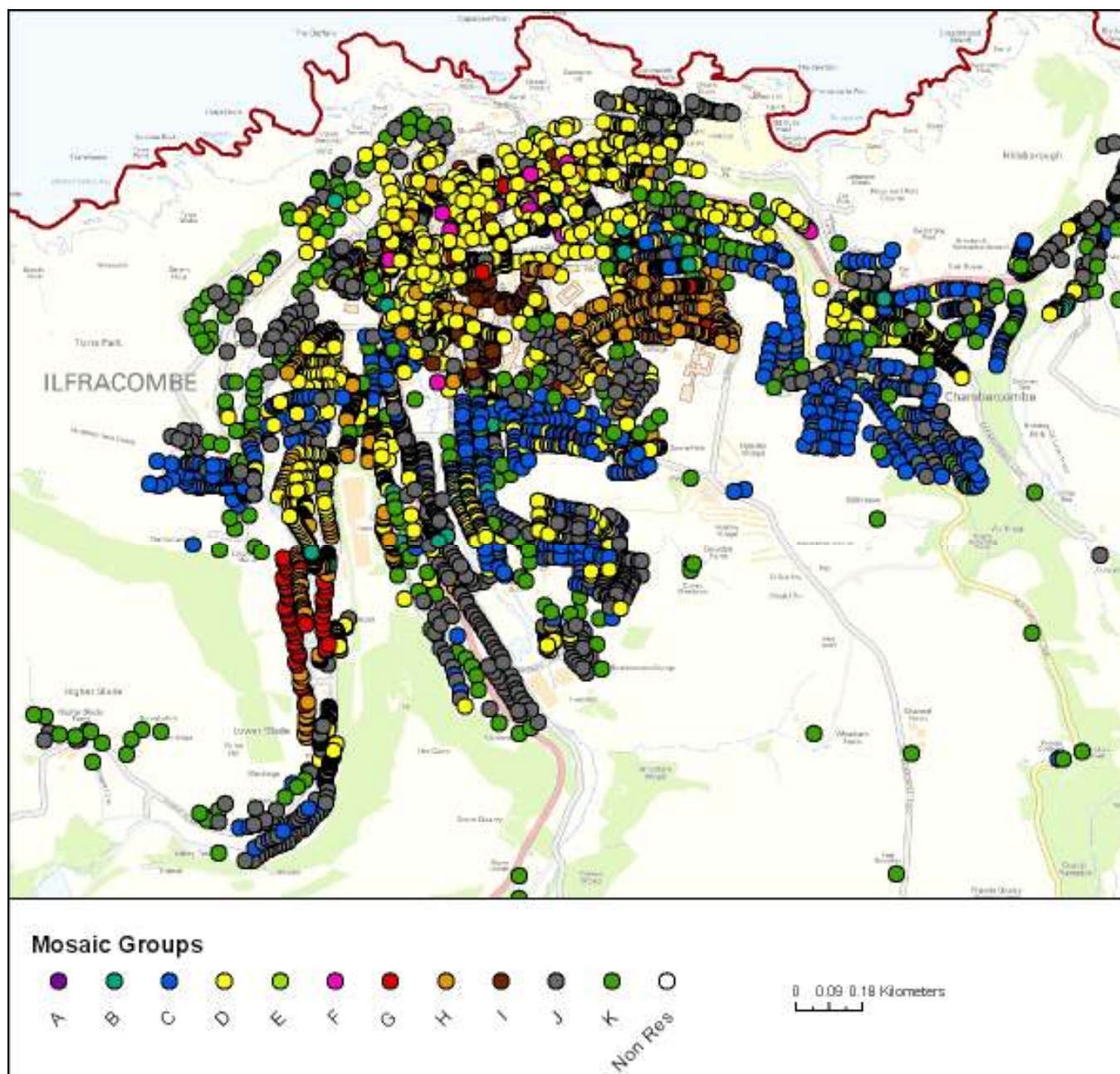


Ilfracombe

Key Features

The map below shows that the greater part of Ilfracombe towards the town centre comprises group D with a smattering of group P. To the south of the centre there are pockets of more deprived groups: for example, group H is evident just to the south of the town centre. Further south there is also a pocket of the more deprived group G.

With regard to the more affluent groups, group C can be seen in numerous clusters to the south and east. Group J also tend to be in clusters around the periphery, most notably lying in the north west and the south.



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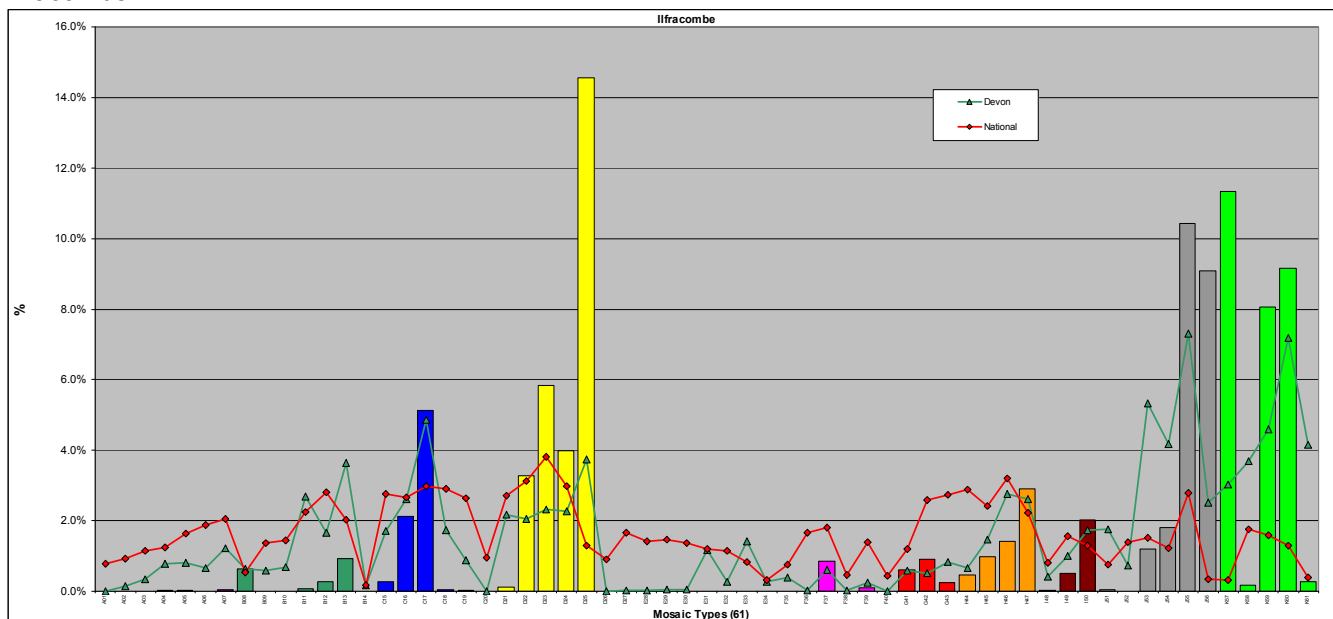
Analysis by mosaic type

Mosaic Types in the Iffracombe Devon Town area.

Key Features

The most common type in the area is D25 (15%) followed by K57 (11%) and J55 (10%). There are a further four types that each have over 5% of the total coverage of Iffracombe (C17, J56, K59 & K60); all of these are over-represented when compared to Devon and national proportions.

The following graph categorise Iffracombe households into Mosaic Types. They are then compared to the national and Devon Mosaic profiles in order to show similarity or difference. Some Mosaic Types do not appear in Iffracombe.



Source: Mosaic data 2009 - © 2004 Experian Ltd

The following table shows the comparative proportions of Mosaic Types in Ilfracombe; these are illustrated in the above graph.

Note: **Red = Prominent Mosaic Types (> 5%)**
 Shaded = over represented in Ilfracombe compared with Devon

Mosaic Types	Percentage of Households		
	Ilfracombe	Devon	National
A01	-	0.0%	0.8%
A02	-	0.1%	0.9%
A03	-	0.3%	1.2%
A04	0.0%	0.8%	1.2%
A05	0.0%	0.8%	1.6%
A06	-	0.7%	1.9%
A07	0.1%	1.2%	2.0%
B08	0.6%	0.6%	0.5%
B09	-	0.6%	1.4%
B10	-	0.7%	1.4%
B11	0.1%	2.7%	2.3%
B12	0.3%	1.7%	2.8%
B13	0.9%	3.6%	2.0%
B14		0.2%	0.2%
C15	0.3%	1.7%	2.8%
C16	2.1%	2.6%	2.7%
C17	5.1%	4.9%	3.0%
C18	0.1%	1.7%	2.9%
C19	0.0%	0.9%	2.6%
C20	-	0.0%	1.0%
D21	0.1%	2.2%	2.7%
D22	3.3%	2.0%	3.1%
D23	5.8%	2.3%	3.8%
D24	4.0%	2.3%	3.0%
D25	14.6%	3.7%	1.3%
D26	-	0.0%	0.9%
D27	-	0.0%	1.7%
E28	-	0.0%	1.4%
E29	-	0.1%	1.5%
E30	-	0.1%	1.4%
E31	-	1.2%	1.2%
E32	-	0.3%	1.2%
E33	-	1.4%	0.8%
E34	-	0.3%	0.3%
F35	-	0.4%	0.8%
F36	-	0.0%	1.7%
F37	0.9%	0.6%	1.8%
F38	-	0.0%	0.5%
F39	0.1%	0.2%	1.4%
F40	-	0.0%	0.4%
G41	0.6%	0.6%	1.2%
G42	0.9%	0.5%	2.6%
G43	0.2%	0.8%	2.7%
H44	0.5%	0.7%	2.9%

H45	1.0%	1.5%	2.4%
H46	1.4%	2.8%	3.2%
H47	2.9%	2.6%	2.2%
I48	0.0%	0.4%	0.8%
I49	0.5%	1.0%	1.6%
I50	2.0%	1.7%	1.3%
J51	0.0%	1.8%	0.8%
J52	0.0%	0.7%	1.4%
J53	1.2%	5.3%	1.5%
J54	1.8%	4.2%	1.2%
J55	10.4%	7.3%	2.8%
J56	9.1%	2.5%	0.3%
K57	11.3%	3.0%	0.3%
K58	0.2%	3.7%	1.8%
K59	8.1%	4.6%	1.6%
K60	9.2%	7.2%	1.3%
K61	0.3%	4.1%	0.4%

Source: Mosaic data 2009 - © 2004 Experian Ltd

Key features of the more dominant / over represented Mosaic Types are shown in the appendices.

Main Mosaic Types

Key Features

The most frequent Mosaic type in the area is D25, followed by K57 and J55.

In Ilfracombe parish the urban D25 accounts for almost 25% of the households (and 46% of the Ilfracombe Central Ward).

In the rural parishes the two rural types of K57 and K60 together make up 47% of the households.

The tables below drill down into each parish/ward within the Devon Town area in order to reveal the three most prominent Mosaic Types that could potentially remain hidden if the Devon Town area is considered as a whole without reference to its components. It should be noted that there may be other Mosaic Types within the area which appear in several parishes but do not feature amongst the most prominent types.

Those highlighted in red indicate types not identified when looking at either Ilfracombe parish or the rural parishes as a whole.

Area	1 st			2 nd			3 rd		
	Mosaic Types	House holds	%	Mosaic Types	House holds	%	Mosaic Types	House holds	%
Ilfracombe Central ward	D25	954	46.0%	J56	183	8.8%	H47	152	7.3%
Ilfracombe East ward	J55	210	18.9%	C17	199	17.9%	D25	163	14.7%
Ilfracombe West ward	J55	372	18.3%	D23	244	12.0%	C17	189	9.3%
Ilfracombe parish	D25	1,149	24.6	J55	734	15.7	D23	529	11.3

Area	1 st			2 nd			3 rd		
	Mosaic Types	House holds	%	Mosaic Types	House holds	%	Mosaic Types	House holds	%
Berrynarbor	K57	146	42.7%	K60	122	35.7%	J56	70	20.5%
Bittadon	K60	19	90.5%	A04	1	4.8%	K58	1	4.8%
Combe Martin	K59	454	34.6%	J55	189	14.4%	K57	179	13.6%
Kentisbury	K60	109	100.0%	-	-	-	-	-	-
Mortehoe	K57	484	49.1%	J56	353	35.8%	J53	48	4.9%
West Down	K60	241	85.8%	K61	22	7.8%	J56	9	3.2%
Rural Parishes	K57	809	26.5%	K60	634	20.8%	J56	542	17.8%

Area	1 st			2 nd			3 rd		
	Mosaic Types	House holds	%	Mosaic Types	House holds	%	Mosaic Types	House holds	%
Devon Town area	D25	1,204	14.6%	K57	938	11.3%	J55	862	10.4%

Source: Mosaic data 2009 - © 2004 Experian Ltd