

## Appendix 4 – Town Centre Healthchecks

## Hereford City Centre

### Description

Hereford is a historic city and is the County Town of Herefordshire. As such, it is the key service centre for the County, and occupies the highest position in the retail hierarchy. It is by some distance the largest centre in Herefordshire in respect of unit numbers and floorspace. The town is focused around a historic retail core, which includes a number of attractive period buildings, such as the Grade I listed Hereford Cathedral, that add character to the city but which do not provide modern, purpose built accommodation that appeals to national multiple retailers.

However, the Old Market shopping centre in the northern part of the city provides a significant amount of modern, purpose built retail accommodation and, as such, accommodates the greatest concentration of national multiples in Hereford. The shopping centre opened in May 2014. In addition to this, the city accommodates a significant number of high end and independent retailers alongside more traditional day-to-day retail and service operators. As with other centres in Herefordshire, the town plays a key role in meeting the needs of both the local and tourist population.

Although the town benefits from a diverse range of retail operators, it also has a vacancy rate higher than both the national average as well as the vacancy rate as recorded at 2012. Whilst a number of these vacancies have been the result of wider market trends, particularly in respect of clothing goods operators (such as the closure of Debenhams and Outfit in the Old Market shopping centre), the proportion of vacant units is such that efforts are required to diversify the offer in the city centre to both re-let currently vacant properties but to also drive additional footfall in order to improve the overall vibrancy and vitality of the city centre.

Hereford city centre is a generally attractive retail destination and has a high standard of environmental quality, with a number of attractive shopfronts which add interest and vibrancy to the street scene. It is also well integrated into the transport network, in respect of both roads and public transport.



Figure 1: Temporary planters located on Bridge Street. Interventions to improve the appearance of the centre are common throughout Hereford.



Figure 2: The Old Market shopping centre provides a number of modern, purpose built retail units.



Figure 3: The public realm on Widemarsh Street is high quality, and provides an attractive retail destination.



Figure 4: Maylords Orchards shopping centre has lower levels of vibrancy than other parts of the city centre.



Figure 5: Hereford is an attractive, historic centre with a number of period and listed buildings, including Hereford Cathedral.



Figure 6: High Town is located at the core of the city centre, and is a key focus for both pedestrian and retail activity in the town.



Figure 7: Brook Retail Park, located to the north of the city centre, is a key retail destination in the city centre.



Figure 8: The Beryl bike share scheme provides an easy and sustainable means of access throughout the city centre.

**Table 1 City Centre Floorspace Composition**

GOAD Category	Floorspace at 2022 (sq.m)	Floorspace at 2022 (%)	Floorspace UK Average at 2022 (%)
Comparison	37,960	29.7	30.2
Convenience	20,570	16.1	15.5
Financial and Business	8,080	6.3	6.8
Leisure	29,620	23.2	25.9
Retail Service	11,460	9.0	7.2
Vacant	20,170	15.8	13.8
<b>TOTAL</b>	<b>127,860</b>	<b>100</b>	<b>100</b>

Source: Composition of city centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of May 2022; UK Average from Experian Goad Report April 2022.

**Table 2 City Centre Unit Composition**

GOAD Category	Units at 2022	Units at 2022 (%)	Units UK Average at 2022 (%)	Units at 2012 (%)
Comparison	170	28.3	27.0	44.7
Convenience	50	8.3	9.3	5.8
Financial and Business	47	7.8	8.9	34.8
Leisure	137	22.8	25.0	
Retail Service	92	15.3	15.7	
Other	0	0.0	0.0	2.1
Vacant	105	17.5	13.8	12.6
<b>TOTAL</b>	<b>601</b>	<b>100</b>	<b>100</b>	<b>100.0%</b>

Source: City centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of May 2022; UK Average from Experian Goad Report April 2022; Units at 2012 taken from Herefordshire Council Town Centres Study Update 2012

## Uses

Hereford is the key retail and service location in the authority area, and as such its offer is focused around comparison goods and service operators. The composition of land uses across the city centre is broadly similar to the current national average position.

There are 170 comparison goods operators in the city centre, which equate to 28.3% of all units. This figure is slightly higher than the current national average of 27.0% of comparison units, but does represent a significant decrease on the 44.7% of comparison goods units recorded at 2012. Although this is a substantial change, it is considered to be reflective of wider changes in respect of comparison goods operators since that time through contraction in the fashion sector and department store sectors, and the closure of Debenhams and Outfit which previously traded from the city centre. It should be noted, however, that the Old Market shopping centre commenced trading in 2014 and that the deterioration in the comparison goods sector may have been even more marked were it not for the attractive and modern retail environment that it provides.

By virtue of the town's size, the comparison goods sector is still relatively diverse and is considered to be commensurate with the centre's role in the retail hierarchy. Hereford contains a number of key national multiples,

including M&S, Primark, Waterstones, TKMaxx, Next and River Island, as well as a number of high end retailers such as L'Occitane, Joules and Seasalt (the last three retailers all trade from the Old Market development).

The proportion of convenience goods operators in the city centre is again similar to the national average, with 50 such operators present at the time of our visit, equating to 8.3% of all units in Hereford (the current national average position equates to 9.3% of operators). This proportion represents an increase on the 5.8% recorded at 2012. Convenience operators include national multiples such as Iceland, Lidl, Morrisons, Tesco and Waitrose, alongside a number of smaller convenience stores and independent operators. The offer is therefore considered to be diverse and a key anchor to activity in the city centre.

A market is held on Hereford High Town, with a general retail market held on Wednesdays, Fridays and Saturdays. A produce and craft market is held every Thursday and the first Saturday of each month.

Service (leisure, retail and financial and business) operators account for 45.9% of all units in Hereford, which represents a good increase on the 34.8% of units recorded at 2012. This improvement in provision is reflective of wider changes across many centres since that time, with leisure and retail service operators taking some of the space vacated by comparison goods retailers. There are 137 leisure service operators, which account for 22.8% of units in the city centre. This figure is slightly less than the 25.0% current national average figure. Leisure service operators include cafés, hot-food takeaways, restaurants, cinemas, nightclubs and public houses. The leisure offer is considered to be generally attractive with a good mix of independents and national multiples, and acts as a key anchor to help drive activity. Additionally, the potential for growth in the city's student population represents an opportunity for additional growth in Hereford's leisure service offer. The leisure service offer is particularly focused around the Old Market development, with a significant number of cafes and takeaways also present along Commercial Road. Retail service operators account for 15.3% of units, a figure broadly similar to the current national average, and the 47 financial and business service operators account for 7.8% of all units.

### **Vacancies**

Our survey identified a total of 105 vacant units throughout the city centre, equivalent to 17.5% of retail units in Hereford. This proportion of vacant units that are vacant is significantly higher than both the national average of 13.8% recorded at April 2022, and the 12.6% vacancy rate recorded in Hereford city centre at 2012. As such, the vacancy rate is a matter of concern and (as the in-street survey undertaken as part of this Study indicates) impacts on visitors' perceptions of the centre and its attractiveness. A number of these vacancies have occurred as a result of wider market trends, particularly in respect of clothing goods operators (such as the closure of Debenhams and the Outfit unit at the Old Market shopping centre).

Whilst vacant units are located throughout the city centre, particular concentrations of vacancies are apparent around the Maylord Orchards shopping centre and along West Street. These areas are notably less vital and viable as a consequence, and there is a need to work with stakeholders (including landlords) to consider how greater activity can be brought to these areas as a top priority. Accordingly, we note proposals to relocate the Library to the Maylord Orchards Shopping Centre (which was purchased by the Council in June 2020) will further add to and improve the vibrancy of the town centre. The presence of two large vacant units at Old Market shopping centre – namely the former Debenhams and Outfit units – also adds to the impression of reduced vibrancy in this particular part of the city centre.

Attention should be given to reoccupying these units as a means to reduce the overall vacancy rate in Hereford. To this end, we note planning application reference P221677/F which seeks the re-occupation of the former Debenhams unit by MandM Direct. The re-occupation of this unit at ground floor level would result in the vacancy rate in respect of floorspace reducing to 13.5%.

**Pedestrian Flows**

Pedestrian activity varied greatly throughout the city centre at the time of our visit. The greatest levels of activity were observed along High Town, Widemarsh Street and Commercial Street. These locations correspond to the primary retail core of the city centre and where the majority of goods and services retailers are located.

Conversely, lower levels of activity were observed particularly along Broad Street, Church Street, and St Owen's Street. These areas lack the vibrancy of the city centre's retail core, with many of the units in these locations being occupied by specialist retailers or non-retail/community uses. The effect of a lack of retail activity, particularly along St Owen's Street on the ground floor, is to create an uninviting pedestrian environment. This feeling is exacerbated by the narrow road carriageways, including West Street and Aubrey Street, which gives the impression that they are somewhat dominated by vehicles.

Low levels of activity were also observed around the bus station and along Commercial Street, and a generally high level of activity was apparent around the town's surface level car parks. This is consistent with the in-street survey which identifies that more than half of visitors to the city centre arrive by private car. The bus and train stations are also relatively removed from the city centre, which contributes to a sense of isolation of it.

**Accessibility**

As the key centre in the authority area and the County Town, Hereford is well related to surrounding settlements and is considered to have a good standard of accessibility, by public transport, private vehicle, and on foot or bicycle. The Hereford city bike share scheme, Beryl Bikes, provides an easy way to get around the city centre, with around 200 bikes located in 66 bays throughout the city. In addition to this, a number of cycle stands were

observed throughout Hereford. Pedestrian accessibility is also considered to be of a high standard, with the pedestrianised parts of the city centre providing a safe, easily navigable environment. Controlled crossing points and subways provide for ease pedestrian movement to and from areas beyond the retail core of the city, such as around the train station.

Hereford train station is located to the north-east of the city centre just off Hereford City Link Road. From here, frequent services travel to a range of destinations including Birmingham New Street, Manchester Piccadilly, Carmarthen, Holyhead, Cardiff Central and Milford Haven. Although the train station is slightly removed from the city centre, it is considered to be relatively easily accessible from it.

Hereford bus station is situated close to the train station, and is located off Commercial Road. The bus station supports a good number of services (such as 33, 461, 861, 449, X3, 36, 476 and 453), which provide frequent access to destinations across the County (such as Ross-on-Wye, Kington and Ledbury), as well as locations further afield, such as Abergavenny, Monmouth and Worcester. Further to this there are a number of bus stops situated throughout the city centre, and, as such, Hereford is considered to have a very high standard of accessibility by public transport.

Accessibility by private vehicle is considered to be good, with a number of car parks located around the city centre. These include 606 spaces at the Old Market, 130 spaces on Gaol Street, and additional spaces at the Bus Station, Bath Street, Berrington Street, City Walls, Friars Street, Garrick House, Hereford Station, Horse & Groom, Kyrle Street, Little Berrington Street, Maylord Orchards, Merton Meadow, Venns Close, Wall Street, and West Street. Customer car parking is also available at the Aldi, Morrisons, Tesco and Sainsbury's foodstores. These facilities provide a large number of short and long term car parking for those visiting the city centre, and are well related and easily accessible to a range of facilities in Hereford. However, stakeholders reported issues with traffic accessibility into the centre, with particular difficulties with congestion along the A49 and other key routes into Hereford.

Hereford is therefore considered to be an easily accessible centre, both for those coming into the city centre but also once visitors are travelling around the city centre itself. It is also noted that the Council have submitted a bid for £25.2m in Levelling-Up Funding (including match funding), which will be directed towards the implementation of a new transport hub at Hereford train station, along with improved walking and cycling routes across the city centre. Irrespective of the as yet undetermined outcome of the bid, it is understood a significant proportion of the project will go ahead. Notwithstanding this, it is clear from stakeholders that accessibility, both for pedestrians and private vehicles into and from the city centre is a challenge.

**Perception of Safety**

Hereford is considered to be a safe and secure city centre, which has a high perception of safety and little visible evidence of crime in terms of anti-

social behaviour, graffiti or loitering (although some 'loitering' was observed along Union Street at the time of our visit). According to the website UKCrimeStats, 475 crimes were reported within a mile radius of Hereford city centre in March 2022. This compares with 384 crimes reported in the same area in March 2021 and 413 in March 2020. The increase in activity perhaps reflects the likely increased use of the centre as greater normality returns subsequent to the removal of Covid-19 related restrictions.

Whilst many areas of the centre benefit from a good standard of natural and passive surveillance, such as along High Town, Widemarsh Street and Commercial Street, areas away from the retail core along Broad Street, Church Street, and St Owen's Street, have significantly lower levels of footfall. The effect of this is to reduce the overall vibrancy and thus also the perception of safety. The city centre is also bisected by a number of ginnels, most of which are fairly enclosed and not overlooked. These areas, particularly at night, are rather unwelcoming. This lack of safe, well-lit routes was raised by stakeholders, who referenced it as a particular barrier to students in the city.

However, by virtue of the city's pedestrianised areas and limited and slow vehicle movements the perception of safety for pedestrians is considered to be generally good.

### **Environmental Quality**

Hereford city centre is an attractive, characterful retail destination that has a history which dates back centuries. This is reflected in a significant number of architecturally interesting and listed buildings, such as Hereford Cathedral on the southern edge of the city centre along Church Street. These buildings are generally well maintained and add an attractive aspect to the retail core of the town. In particular, the area around along High Town, Widemarsh Street and Commercial Street is a pleasant environment. The lack of significant vehicle movements in around this area, but throughout the city centre more generally, further strengthens Hereford's environmental quality. Pedestrianised areas, including Church Street and the Old Market shopping centre add to this. In particular, the modern, purpose built nature of the Old Market shopping centre provides a particularly attractive retail destination, with well-maintained areas of public realm.

Although the environmental quality of the city centre is generally poorer in peripheral areas – such as Broad Street, King Street and Eign Gate – this does not mean that these areas are considered to be of poor quality. Rather the environment and appearance of these locations is primarily functional compared to the more attractive and period appearance of areas around High Town, which have clearly benefited from recent investments into the public realm. The lack of retail activity, particularly along St Owen's Street on the ground floor, reduces the overall perception of vitality, and thus the level of environmental quality, in this location. Observations in the city and from stakeholders highlighted the potential for increased café culture,



particularly around High Town, as a means of increasing the vibrancy and, if managed properly, environmental quality of this area.

The public realm along Eign Gate is rather cluttered, with a large number of street planters and furniture located along the centre of this key route. This somewhat prohibits pedestrian movement, and as such it is felt that this area would benefit from rationalisation of these features.

Notwithstanding this, it is considered that Hereford has a generally high standard of environmental quality, with a distinct character and appearance. However, stakeholders noted that the centre would benefit from new bins and signage and enhanced cleaning, with the current programme of cleaning in the city centre considered by some to be inadequate.

## Conclusions

The County Town of Herefordshire, Hereford is the largest centre in the authority area in respect of both unit numbers and floorspace. The city centre is the focus for national multiple retailers in the County, with purpose built accommodation such as the Old Market shopping centre in the northern part of the city accommodating the greatest concentration of national multiples in Hereford. In addition to this, the city centre accommodates a significant number of high end and independent retailers alongside more traditional day-to-day retail and service operators.

Hereford is an attractive retail destination and has a high standard of environmental quality, with a number of attractive shopfronts which add interest and vibrancy to the street scene. The town is focused around a historic retail core, which includes a number of attractive period buildings.

Local agents have confirmed that commercial rents in Hereford have generally declined in the past five years, and indeed there have been instances of commercial premises being let on High Town for a five year period. This reflects wider national challenges in the retail sector over that period, but also presents an opportunity for the diversification of the offer in the city centre, possibly through increased café culture and an ever-greater food and drink offer.

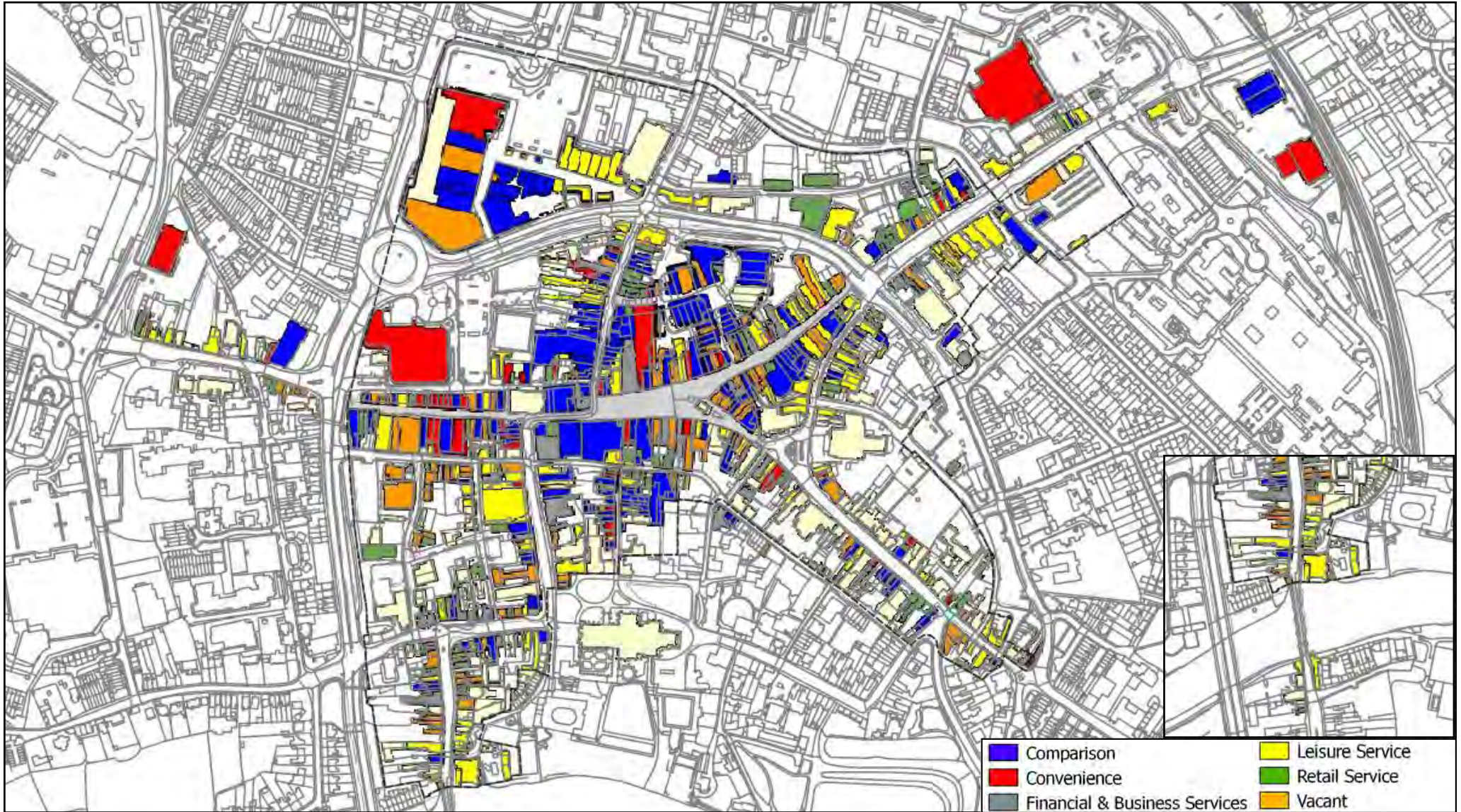
Although the town benefits from a diverse range of retail operators, it also has a vacancy rate higher than both the national average as well as the vacancy rate as recorded at 2012. Whilst a number of these vacancies have been the result of wider market trends the proportion of vacant units is such that efforts are required to diversify the offer in the city centre to both re-let currently vacant properties but to also drive additional footfall in order to improve the overall vibrancy and vitality of the city centre. To this end, the proposed re-occupation of the former Debenhams unit by MandM Direct is considered to be a positive development that may help to reduce the overall vacancy rate in the city centre. Other projects, including the multi-million pound investment to complete refurbishment of Hereford Museum and Art Gallery (HMAG) in Broad Street and the relocation of

Hereford Library to a renovated Maylord Orchards centre will further add to the vibrancy, and offer, of the centre.

The centre would also appreciably benefit from further diversification in order to provide for the re-occupation of retail units, and provide additional reasons to visit and to linger in the centre. To this end, the formation of the Hereford BID in 2015 has helped to catalyse and drive change in the centre since that time, and is working to reinvigorate the centre.

As a result of the increased vacancy rate, and its negative impact in respect of the appearance and function of the parts of the centre, we find Hereford's vitality and viability to currently be moderate.

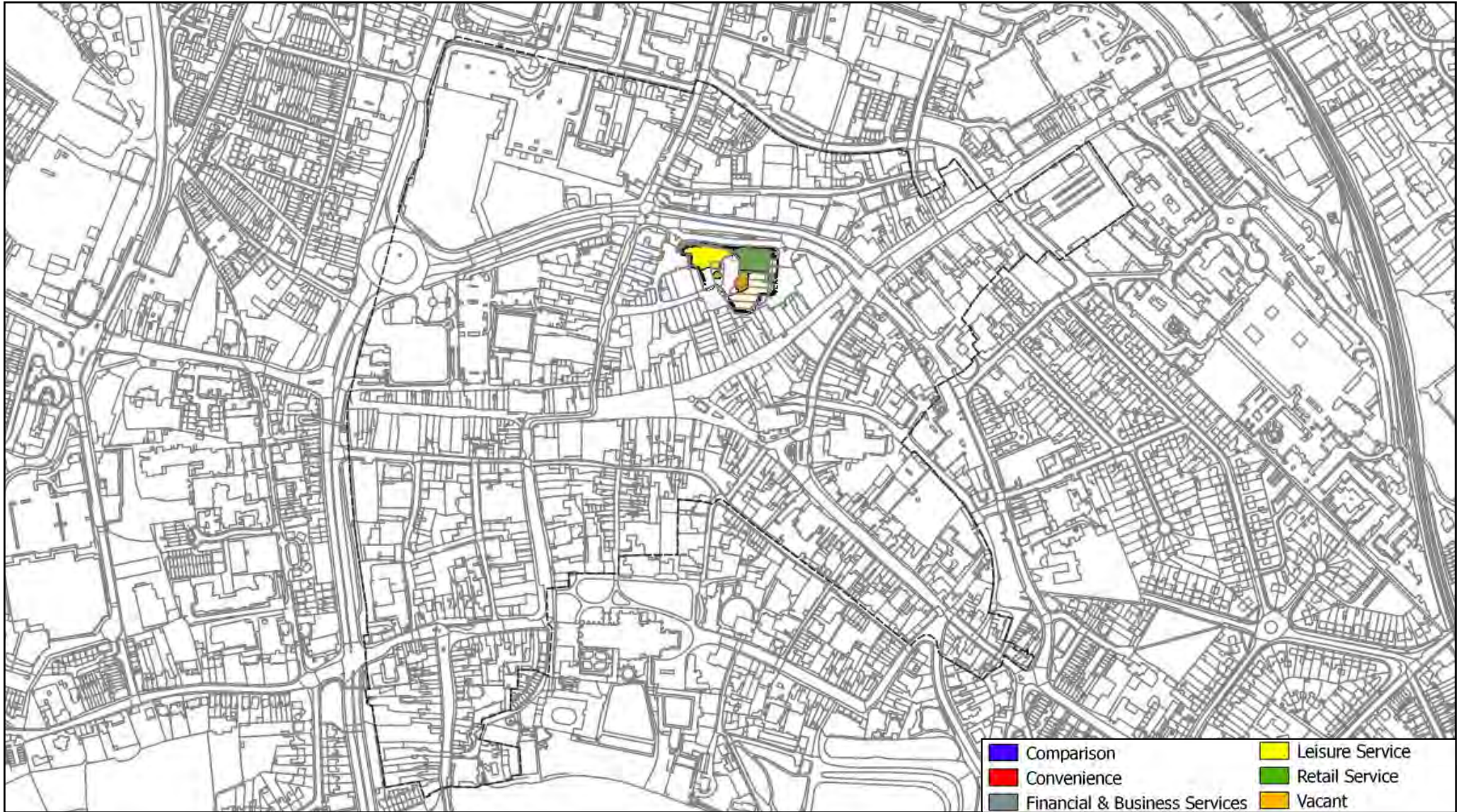
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## Hereford town centre

Herefordshire Town Centre and Retail Assessment 2022

Survey Date - May 2022



## Hereford town centre - first floor

Herefordshire Town Centre and Retail Assessment 2022

Survey Date - May 2022

## Bromyard Town Centre

### Description

Bromyard is a small town centre located in the north east of Herefordshire. The defined town centre is focused along Broad Street, and comprises a historic retail core. Although this results in the town centre having an attractive and characterful appearance, it does reduce the availability of modern, purpose built units which are likely to appeal to the needs of modern operators. As such, it is noted that the defined town centre does not include the Co-operative Foodstore located on Tenbury Road.

Notwithstanding this, the centre provides a reasonable range of operators which are considered appropriate in meeting the day-to-day needs of the local community. The majority of operators are independents, which creates a unique profile for the town. Alongside a diverse range of service and comparison operators, Bromyard has a number of community facilities further support the role and function of the town centre, such as Halo Bromyard.

The defined boundary of the town centre includes a number of residential properties and other non-retail operators, and the centre is generally well maintained and provides an attractive and pleasant retail environment.



Figure 1: Car parking at Market Square.



Figure 2: The Co-op Food store on High Street.



Figure 3: Halo Bromyard Library and Leisure Centre.



Figure 4: Broad Street and High Street are the main retail parades in Bromyard.

**Table 1 Town Centre Floorspace Composition**

GOAD Category	Floorspace at 2022 (sq.m)	Floorspace at 2022 (%)	Floorspace UK Average at 2022 (%)
Comparison	2,896	28.3	30.2
Convenience	881	8.6	15.5
Financial and Business	1,134	11.1	6.8
Leisure	3,331	32.5	25.9
Retail Service	1,338	13.1	7.2
Vacant	663	6.5	13.8
<b>TOTAL</b>	<b>10,243</b>	<b>100</b>	<b>100</b>

Source: Composition of Town centre based on defined town centre boundary taken from Herefordshire Local Plan Core Strategy 2011-2031 and derived from Nexus Planning Survey of May 2022; UK Average from Experian Goad Report April 2022.

**Table 2 Town Centre Unit Composition**

GOAD Category	Units at 2022	Units at 2022 (%)	Units UK Average at 2022 (%)	Units at 2012 (%)
Comparison	33	38.8	27.0	36.7
Convenience	7	8.2	9.3	10.1
Financial and Business	6	7.1	8.9	43.0
Leisure	18	21.2	25.0	
Retail Service	15	17.6	15.7	
Other	0	0.0	0.0	1.3
Vacant	6	7.1	13.8	8.9
<b>TOTAL</b>	<b>85</b>	<b>100</b>	<b>100</b>	<b>100.0%</b>

Source: Composition of Town centre based on defined town centre boundary taken from Herefordshire Local Plan Core Strategy 2011-2031 and derived from Nexus Planning Survey of May 2022; UK Average from Experian Goad Report April 2022; Units at 2012 taken from Herefordshire Council Town Centres Study Update 2012

## Uses

There are 33 comparison goods operators in Bromyard, which account for 38.8% of all units in the town centre. This represents a greater proportion than the current national average, and a slightly large proportion than that recorded at 2012. Operators are diverse and include those focused on providing for the day-to-day needs of the local community (including a pharmacy), together with clothing shops and more specialist retailers, such as an art gallery, antique shops and B&M Johnson kitchens.

The historic nature of the town centre limits the availability of modern, purpose built premises in Bromyard. This may impact on the quantum of floorspace dedicated to convenience goods retail, as there is no large scale grocery provision within the centre. As such, the proportion of convenience goods operators is somewhat lower than may be expected for a centre with Bromyard's position in the retail hierarchy and role in meeting the needs of the local community.

There are a total of seven convenience operators in the town centre which account for 8.2% of all commercial units. This provision is anchored by the Co-op on High Street. Although the convenience offer within the defined

centre is relatively limited, it is noted that there is a larger Co-op foodstore located on Tenbury Road, to the north of the town centre boundary.

At 2012, service operators (leisure, retail and financial and business) accounted for 43.0% of all unit in Bromyard town centre. Our survey of the centre in May 2022 identified that such uses now account for 45.9% of all such units, a figure which represents a small increase on the proportion recorded at 2012. These units, which mainly include leisure service (public houses, hot-food takeaways and cafés) and retail service (hairdressers, beauty salons, undertakers and opticians), are considered to provide an appropriate offer capable of meeting a good proportion of the day-to-day needs of the local community.

### **Vacancies**

At the time of our visit a total of six vacant units were observed throughout the town centre. These units, which are equivalent to 7.1% of all units in the town centre, are distributed throughout Bromyard. Two of the larger units are situated around Market Square, including the former Hope Hotel. The vacant former HSBC at the junction with Pump Street also occupies a key location in the town centre.

Whilst the vacancy rate is not considered to represent cause for concern (it is lower than the current national average and the vacancy rate recorded within the centre at 2012), efforts should be made to secure the re-occupation of these key landmark vacant units in the town centre.

### **Pedestrian Flows**

Apart from around the junction of Broad Street and New Road, pedestrian activity at the time of our visit was regular if relatively light. Broad Street is a particular focus for activity. Throughout the remainder of the centre, particularly along Rowberry Street, lower levels of activity were observed. This is potentially explained by the nature of the units in these locations, which include a greater number of business properties and residential units, which generate lower levels of activity.

The layout of the town centre is such that it lacks a single defined retail 'core'. Rather it is dispersed through a wide area with a number of non-retail uses, particularly residential properties, located within the defined boundary. Although this is particularly the case along Rowberry Street, Broad Street benefits from a continuous retail parade which acts as an anchor for activity. Therefore, pedestrian activity in the town centre is largely focused along Broad Street.

### **Accessibility**

Due to its rural character, Bromyard is considered to have a reasonable standard of accessibility. It is well related to the wider road network, being located just to the north of the A44 Bromyard Bypass, as well as being fairly well integrated into the County's public transport network.

Due to the narrow roads and historic nature of the town centre, which reduces the ease of bus movements through Bromyard, there are no bus services which stop within the defined boundary of the town centre. The closest bus stop to the town centre is located on Pump Street, which serves

service numbers 405, 420, 469, 482, 671, 672, 673 and 674. These services provide frequent access to a range of destinations, including Hereford, Ledbury and Worcester. Hereford can be accessed in approximately 40 minutes via bus from Pump Street bus stop.

Car parking is readily available throughout the town centre, with a considerable amount of free-to-use on-street car parking provided along Broad Street. These spaces provide a large amount of short-term (up to one hour) car parking for those visiting the town centre. In addition to this there are 61 car parking spaces provided on Tenbury Road (to the north of the defined town centre), with one hour of car parking costing £0.50. The town centre is therefore considered to be easily accessible to those arriving by private vehicle.

Bromyard is centrally located adjacent to residential areas in the town, and as such is considered to be easily accessible on foot. In respect of pedestrian accessibility, there are no controlled crossing points in the town centre, although there is a crossing point located at the north-east of the town centre on Church Street (adjacent to the Post Office). As such, the roads which pass through the town centre, and the volume of traffic which moves along them, could create a barrier to pedestrian movement. Additional crossing points, particularly along Broad Street where activity is concentrated, could be explored.

**Perception of Safety**

Bromyard town centre is relatively linear in nature, with a number of non-retail uses within the defined centre boundary. The centre is also bisected by Broad Street and Old Road, which both have a relatively high, and constant, level of traffic moving along them. As such, Bromyard benefits from a high standard of both natural and passive surveillance. Due to the varied activity through the centre, and the residential properties located within it, this surveillance is likely to continue at all hours of the day thereby providing a good standard of safety. According to the website UKCrimeStats, 34 crimes were reported within a mile radius of Bromyard town centre in March 2022. This compares with 41 crimes reported in the same area in March 2021 and 41 in March 2020.

Although the perception of safety in Bromyard is generally of a high standard, the centre lacks any significant pedestrianised areas which could help to improve the overall perception of safety, particularly for pedestrians. However, the wide pedestrian footways along Broad Street, as well as on-street parking in this location ensure that despite the volume of traffic that moves through the centre the perception of pedestrian safety is generally good.

**Environmental Quality**

Bromyard is a pleasant market town, with well-maintained retail units and clear evidence of investment into a number of units to improve the overall retail environment and appearance of the centre. A number of these retail units along Broad Street provide a positive influence on the environmental quality in Bromyard, and tree lined areas of the town centre, such as around The Square, are particularly beneficial features.



A number of the retail units have distinctive storefronts and appearances, and there are a number of historic and period timber framed buildings in the town centre which further improve Bromyard's overall environmental quality. However, peripheral areas, such as Rowberry Street, have a lower standard of environmental quality by virtue of limited activity and fewer ground floor uses in this location, thereby reducing the overall perception of vibrancy.

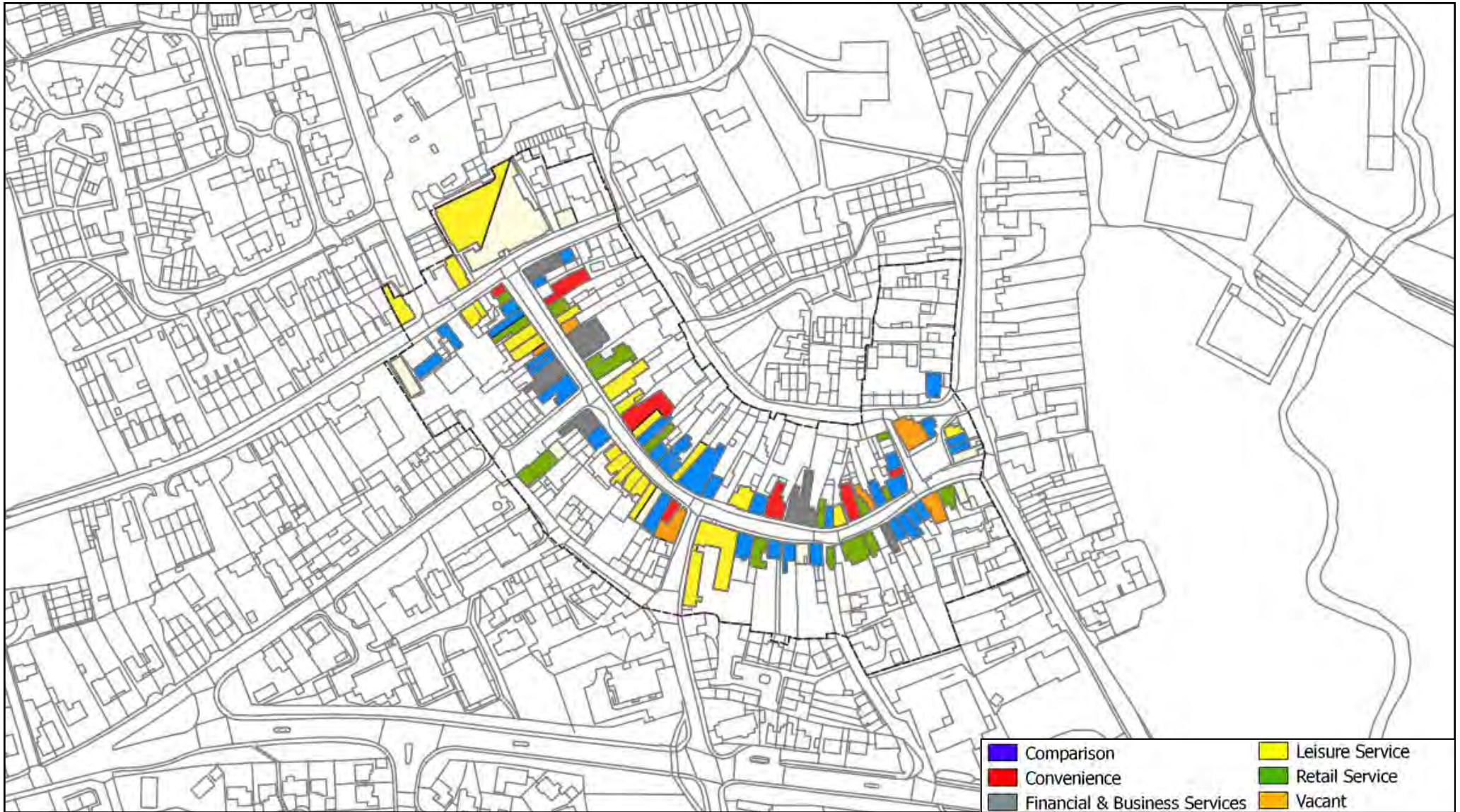
Broad Street is part of a one-way circuit through the town centre, but is a relatively well-used route and, as such, the centre has a high number of vehicular movements through it. The result of this is to negatively impact the centre's overall environmental quality. Notwithstanding this, the environmental quality of Bromyard is considered to be good.

**Conclusions**

Located in the north east of the County, Bromyard town centre is focused along Broad Street, and comprises an historic retail core. This results in the town having few modern, purpose built retail units which are considered to be appeal to national multiples. As such, the majority of operators in the town centre are independents.

The town centre provides a reasonable range of operators which are considered to be easily capable of providing for the day-to-day needs of the local community. Although within the defined boundaries of the town centre are a number of residential properties and other non-retail operators, which impact the vibrancy in parts of Bromyard, the centre is generally well maintained and provides an attractive and pleasant retail environment. The proximity of retail uses to residential dwellings also means that the centre is well located in terms of meeting day-to-day retail needs, albeit we note that its convenience goods retail offer has slightly diminished over the past decade.

Notwithstanding this, Bromyard is considered to be a vital and viable town centre.



# Bromyard town centre

Herefordshire Town Centre and Retail Assessment 2022

Survey Date - May 2022

## Kington Town Centre

### Description

Located in the far west of the County, Kington town centre is a historic town, with an attractive retail core which includes a number of period and heritage buildings which add character and interest to the town centre. Kington's character is further enhanced by its market.

The centre is focused around a linear retail street, comprised of High Street, Church Street and Bridge Street, and includes a diverse range of goods and services which appropriately provide for the day-to-day needs of the local community. Kington is principally anchored by its convenience and leisure service offer, which reflect the centre's role as a key service centre to surrounding villages in this part of Herefordshire. Kington town centre is relatively tightly defined with limited potential development opportunities.



Figure 1: Kington Market Hall on Church Street is a key landmark building in the town, and hosts a number of community events.



Figure 2: The narrow pedestrian footways along High Street reduce the ease and safety of pedestrian movements through the town centre.



Figure 3: The Co-op Foodstore on Crabtree Road underpins the convenience goods offer in Kington town centre.



Figure 4: There are a number of shopfronts located throughout the town centre which lend a positive impression to the town's appearance.

**Table 1 Town Centre Floorspace Composition**

GOAD Category	Floorspace at 2022 (sq.m)	Floorspace at 2022 (%)	Floorspace UK Average at 2022 (%)
Comparison	2,141	24.4%	30.2
Convenience	2,503	28.5%	15.5
Financial and Business	714	8.1%	6.8
Leisure	1,513	17.2%	25.9
Retail Service	1,067	12.1%	7.2
Vacant	845	9.6%	13.8
<b>TOTAL</b>	<b>8,783</b>	<b>100</b>	<b>100</b>

Source: Composition of town centre based on defined town centre boundary taken from Herefordshire Local Plan Core Strategy 2011-2031 and derived from Nexus Planning Survey of May 2022; UK Average from Experian Goad Report April 2022.

**Table 2 Town Centre Unit Composition**

GOAD Category	Units at 2022	Units at 2022 (%)	Units UK Average at 2022 (%)	Units at 2012 (%)
Comparison	23	29.9	27.0	39.7
Convenience	13	16.9	9.3	11.8
Financial and Business	8	10.4	8.9	33.8
Leisure	12	15.6	25.0	
Retail Service	10	13.0	15.7	
Other	0	0.0	0.0	1.5
Vacant	11	14.3	13.8	13.2
<b>TOTAL</b>	<b>77</b>	<b>100</b>	<b>100</b>	<b>100.0%</b>

Source: Composition of town centre based on defined town centre boundary taken from Herefordshire Local Plan Core Strategy 2011-2031 and derived from Nexus Planning Survey of May 2022; UK Average from Experian Goad Report April 2022; Units at 2012 taken from Herefordshire Council Town Centres Study Update 2012

## Uses

Kington is focused around providing for the day-to-day needs of the local community, both within the wider town as well as the surrounding rural areas.

The centre is anchored by a robust range of comparison goods operators, many of which are independently operated. The 23 comparison goods operators account for 29.9% of all units in the town centre, a figure which is greater than the current national average but considerably lower than the proportion recorded at 2012. Comparison goods operators include those focused on providing for the day-to-day needs of the local community, such as a pharmacy, garden goods shop and electrical goods retailer, but also more specialist operators including art galleries, a flooring shop and furniture goods retailer.

The convenience goods offer in the town centre is anchored by Co-op Food on Crabtree Road. The 13 convenience goods operators account for 16.9% of all units in Kington, and include a Spar and Nisa Local, as well as a baker, a butcher, a greengrocer and off-licence. Regular food markets are held every Friday, where a range of locally produced foods, crafts and other

goods are sold. An artisan market is held every third Saturday between April and December.

Service operators, which include leisure, retail and financial and business services, account for 39.0% of all units in Kington. This figure represents a small increase on the 33.8% of such operators recorded at 2012. The range of service operators in the town centre is considered to be diverse, and easily capable of meeting the needs of the surrounding community. Notwithstanding this, the centre's leisure service offer is relatively modest and there may be the potential to expand this in the future.

### **Vacancies**

There are a total of 11 vacant units located throughout Kington town centre. These equate to 14.3% of all units in the town centre, a figure broadly similar to the current national average and little changed from the 13.2% recorded at 2012. The vacant units are located around the junction of High Street and Bridge Street, with the concentration of these units impacting upon the impression of vibrancy in this area.

However, the vacancy rate is not generally considered to represent cause for concern at this time. The stable vacancy rate in the town centre over time is reflective of Kington's role as a key service centre, and its importance in meeting the day-to-day needs of the community in the north-west of Herefordshire.

### **Pedestrian Flows**

Although pedestrian activity was relatively limited at the time of our visit, the levels of activity were constant. At the time of our visit pedestrian activity was most pronounced along High Street, and around the Co-op Foodstore on Crabtree Road. The lowest activity was observed along Bridge Street, perhaps reflective of the limited number of retail uses in this location, as well as the well-used junction of High Street and Bridge Street, which acts to negatively impact pedestrian desire lines. Furthermore, the narrowness of the pedestrian footways, particularly along High Street were observed as acting to reduce the ease of pedestrian movement. Notwithstanding this, pedestrian activity in this location was still observed as being strong.

Limited levels of linked trips were observed between the Co-op foodstore on Crabtree Road and other retailers in the town centre. The foodstore is functionally removed from the main retail parades in Kington and, although it forms part of the defined town centre, the low propensity of linked trips suggest that, in practice, it plays a limited role in driving activity through the town centre. Rather, customers to the food store are likely to arrive by car and use the private car parks provided at the facility for a single trip.

### **Accessibility**

Kington is located in the far west of the authority area, but is well related to the wider regional road network as well as the County's public transport network.

Bus stops located along High Street serve the number 41, 460, 461, 462 and 861 routes, which provide frequent access to a range of destinations

such as Hereford, Knucklas and Llandrindod Wells, as well as other destinations throughout Herefordshire.

There is a considerable amount of car parking located throughout Kington. This includes 53 and 19 free to use spaces at High Street and Market Hall Street respectively, alongside 41 pay-and-display spaces at Mill Street (although these are free to use outside the hours of 8am – 6pm, Monday to Saturday). Additional car parking is provided at The Square. On-street car parking is relatively limited, in part due to the narrow nature of the roads that run through the town’s historic centre.

Pedestrian accessibility is generally good in Kington. The limited volume of slow moving traffic which passes through the centre ensures that pedestrian movements are relatively safe and easy, although the narrow pedestrian footways which line High Street in particular do impact upon users’ ability to use Kington town centre in the most straightforward manner. Furthermore, the relatively dislocation of the Co-op foodstore from the retail ‘core’ of Kington does impact somewhat on its ability to support linked trips on foot to the centre.

**Perception of Safety**

Kington town centre is formed around a linear retail core along High Street, Church Street and Bridge Street. Accordingly, the town centre benefits from a high standard of both natural and passive surveillance, with most parts of the town centre being relatively open. This gives the impression of a safe and secure town centre. Additionally, by virtue of relatively constant pedestrian levels throughout the town centre, the perception of safety for visitors was further enhanced. According to the website UKCrimeStats, 28 crimes were reported within a mile radius of Kington town centre in March 2022. This compares with 11 crimes reported in the same area in March 2021 and 15 in March 2020.

In respect of pedestrian safety, although the centre has a limited number of safe pedestrian crossing points, pedestrian crossing is generally straightforward due to vehicles generally moving slowly through the town centre. Visibility for pedestrian crossing on all roads in the town centre is generally high, however narrowness of the pedestrian footways through Kington do negatively impact upon the perception of pedestrian safety. Notwithstanding this, Kington is considered to be a safe and secure town centre.

**Environmental Quality**

In general, Kington is considered to have a high standard of environmental quality. The majority of retail units appear to be well maintained, and the appearance of them is attractive. Any window retail displays are relatively tidy and do not add to an impression of street clutter, furthermore the limited size of the public realm in the town centre reduces the possibility for street clutter and store-front displays.

However, areas of public realm, particularly around High Street and Mill Street, are of a good standard. Street trees, particularly at the junction of Mill Street and Crabtree Road, and the war memorial at The Square further

improve the appearance and attractive of the town centre. The centre also benefits from signposting and resting points, particularly along Mill Street.

The entirety of Kington town centre comprises a Conservation Area. The number of period buildings throughout Kington (including The Market Hall) add architectural interest and create landmarks that define the town centre. The lack of significant vacant buildings or development plots within the core of the town centre has the effect of creating a high standard of vibrancy which further bolsters the town's overall environmental quality.

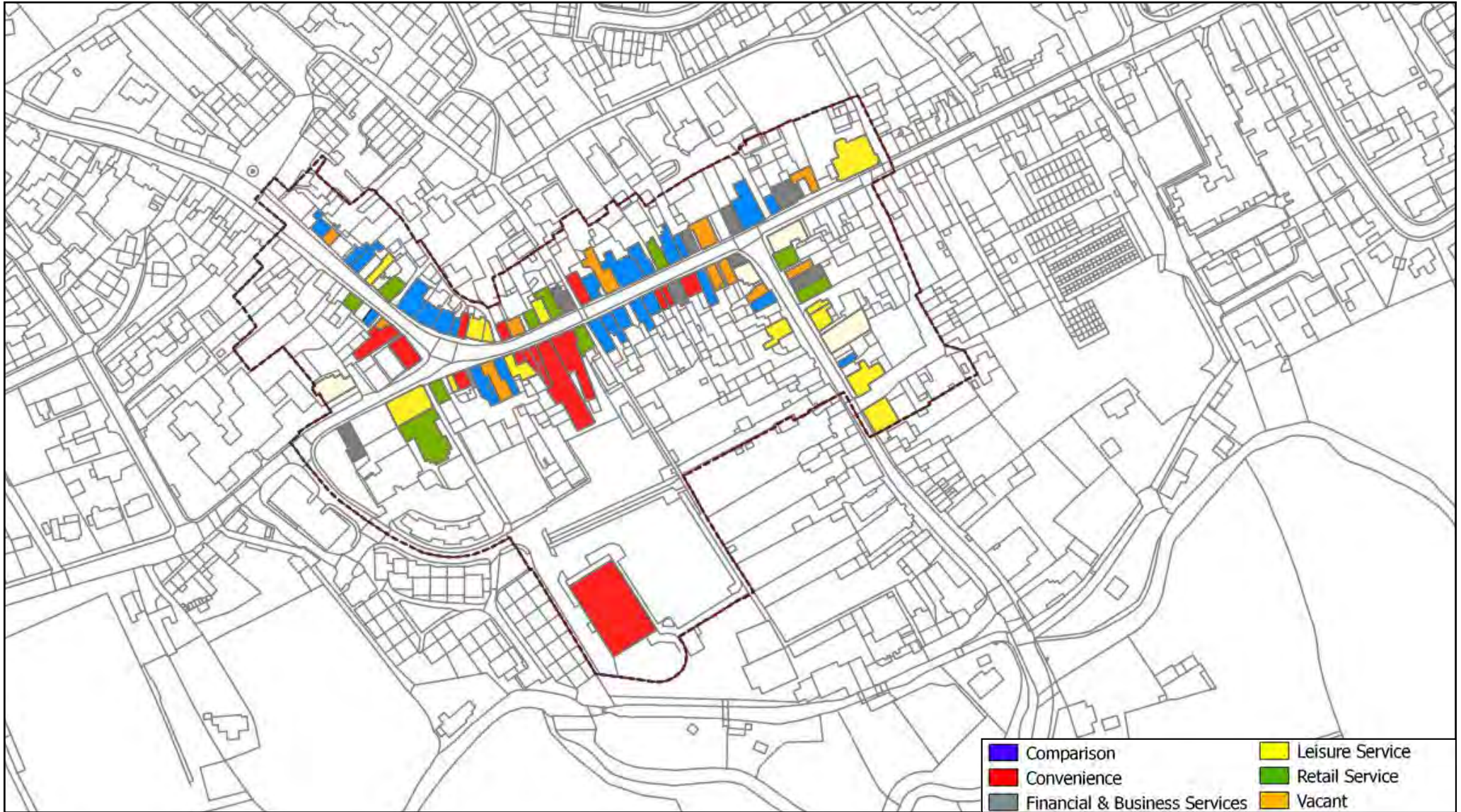
Despite the centre being dominated by public highways and lacking significant pedestrianised areas, the relatively limited traffic that moves through the centre does so at slow speeds. This traffic does not therefore significantly detrimentally impact the centre's overall environmental quality.

### **Conclusions**

Kington is a key service centre in the west of the County, and provides a diverse range of services and facilities geared at meeting the day-to-day needs of the local community. It is anchored by a diverse range of comparison and convenience goods operators, augmented by a number of service operators and community facilities.

The town centre is historic, and this is reflected in the traditional appearance and character of the town centre. The heritage buildings throughout the town lend a positive aspect to Kington, and the large number of independent operators in the town result in Kington having a unique appeal.

Although the vacancy rate is slightly higher than the national average, it has remained stable since 2012 and, as such, is not considered to represent cause for concern at this time. Accordingly, Kington is considered to be a vital and viable centre although it will be important that there is no significant deterioration in the centre's overall vacancy rate.



# Kington town centre

Herefordshire Town Centre and Retail Assessment 2022

Survey Date - May 2022



## Ledbury Town Centre

### Description

Ledbury is situated in the east of the authority area, close to the Malvern Hills. It has a historic retail core, with a number of the buildings, many of which are timber-framed, dating from the 15<sup>th</sup> century. The historic nature of the centre results in a characterful and attractive retail environment, however this is somewhat impacted by the volume of traffic in parts of Ledbury.

Ledbury's offer is focused around comparison and service operators, the majority of which are independents. This is likely the result of the high number of period and historic properties, which limits Ledbury's ability to attract larger retailers. Notwithstanding this, the town centre supports a good range of operators to meet the day-to-day needs of the local community.



Figure 1: The majority of buildings in the town centre are historic and period in nature, limiting the town centre's appeal to national multiple operators.



Figure 2: The Co-op foodstore on New Street. Ledbury is well served by convenience goods operators, although a number of these are beyond the defined town centre boundary.



Figure 3: High Street is the primary thoroughfare through Ledbury, and is the main location for retail and service operators in the town centre.



Figure 4: There is a considerable amount of car parking provided throughout Ledbury, including surface level car parking at St. Katherine's.

**Table 1 Town Centre Floorspace Composition**

GOAD Category	Floorspace at 2022 (sq.m)	Floorspace at 2022 (%)	Floorspace UK Average at 2022 (%)
Comparison	8,040	31.9	30.2
Convenience	4,380	17.4	15.5
Financial and Business	1,920	7.6	6.8
Leisure	6,460	25.6	25.9
Retail Service	2,460	9.8	7.2
Vacant	1,950	7.7	13.8
<b>TOTAL</b>	<b>25,210</b>	<b>100</b>	<b>100</b>

Source: Composition of Town centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of May 2022; UK Average from Experian Goad Report April 2022.

**Table 2 Town Centre Unit Composition**

GOAD Category	Units at 2022	Units at 2022 (%)	Units UK Average at 2022 (%)	Units at 2012 (%)
Comparison	56	34.6	27.0	48.3
Convenience	18	11.1	9.3	12.1
Financial and Business	13	8.0	8.9	32.2
Leisure	31	19.1	25.0	
Retail Service	29	17.9	15.7	
Other	0	0.0	0.0	2.0
Vacant	15	9.3	13.8	5.4
<b>TOTAL</b>	<b>162</b>	<b>100</b>	<b>100</b>	<b>100.0%</b>

Source: Town centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of May 2022; UK Average from Experian Goad Report April 2022; Units at 2012 taken from Herefordshire Council Town Centres Study Update 2012

## Uses

Ledbury town centre is dominated by comparison and service operators, as is often the case with centres with a comparable role in the retail hierarchy. The centre's high number of period and historic properties limits Ledbury's appeal to national multiple operators, who generally tend to prefer modern, purpose built retail premises. As such, the centre is dominated by independent operators.

Notwithstanding the overall decrease in the proportion of comparison goods operators since 2012, Ledbury retains a proportion of such operators that is in excess of the current national average. There are 56 comparison operators in the town centre, which account for 34.6% of all units in Ledbury. Although the level of provision has decreased since 2012, the range of comparison goods operators remains strong and suitable to serve the needs of the local community.

In respect of convenience goods, there are 18 such operators in the town centre which equate to 11.1% of all units, a figure broadly similar to that recorded at 2012 and slightly higher than the current national average. The convenience goods provision in Ledbury is anchored by a Co-op foodstore on New Street. Ledbury was granted a market charter in 1138, and the Ledbury Charter Market is still held on a Tuesday and Saturday. A range of goods, including foods, household goods, hardware and plants are sold.

Although the convenience goods offer within the town centre is relatively limited, beyond the town centre Ledbury is well served by convenience goods operators with a Tesco superstore at The Homend and Aldi at New Mills Industrial Estate.

At 2012, service operators – which include leisure, retail and financial and business service operators – accounted for 32.2% of all units in the town centre. This compares with the 45.1% of all units occupied by service operators at 2022. Leisure service operators include a range of cafés, restaurants, hot-food takeaways and public houses, alongside a diverse range of retail service operators.

### **Vacancies**

Our survey recorded a total of 15 vacant units throughout the town centre at 2022. Notwithstanding the fact that the vacancy rate in Ledbury has increased from 5.4% of units at 2012 to 9.3% at 2022, the vacancy rate remains lower than the current national average at April 2022.

Vacant units in the town centre are clearly located in the more peripheral parts of Ledbury, with particular concentrations along The Southend and Bye Street. Fewer vacant units are located along The Homend and High Street, reflective of the higher levels of footfall in these locations resulting in greater levels of vibrancy.

Accordingly, although the current vacancy rate in Ledbury is not considered to represent cause for concern.

### **Pedestrian Flows**

Pedestrian activity varies considerably throughout Ledbury. The greatest levels of activity were observed along The Homend and High Street, from the junction of Worcester Road to Bank Crescent. That significant levels of activity were observed in this location is to be expected, as this is the location which includes the centre's comparison goods offer, as well as the location of the town's retail banks. It is therefore the area with the greatest concentration of shops and services to serve the day-to-day needs of the local community and visitor population. Bye Street and the link between High Street and the library, which both link St Katherine car park to the main retail 'core' of Ledbury, are well-used pedestrian routes.

More limited levels of activity were observed at the northern and southern ends of the centre, and along Church Street and Church Lane, with even lower levels of activity observed in peripheral areas such as New Street. The lowest level of pedestrian activity in the centre was observed along New Street in the west of the centre. This area of Ledbury has a limited number of retail units, and as such is not considered likely to attract a strong flow of pedestrians.

Although the volume of passing traffic could form a barrier to movement, particularly at times of high congestion, the number of controlled pedestrian crossing points and the generally slow speed at which this traffic moves is such that it is not considered to represent a significant barrier to pedestrian movement.

### Accessibility

Ledbury is considered to have a high standard of accessibility. In respect of public transport, Ledbury train station is located approximately 650 metres to the north of the defined boundary of the centre. The station supports frequent services to Hereford and Birmingham New Street, as well as a less frequent train to London Paddington. Within the centre a number of bus services can be accessed from mostly covered, sheltered bus stands. These bus routes include service numbers 405, 417, 476, 479, 482, 600, 671, 672, 673, 674, 675 and 679, which access Hereford, Great Malvern and Worcester, as well as the Ledbury circular route.

Accessibility by private vehicle is considered to be good. There is plentiful surface level car parking, with a number of pay-and-display facilities located along Bye Street and Bridge Street. St Katherine's car park on Bye Street provides 130 spaces, from £1.20 for 1 hours of parking. Additional facilities are located at Bye Street (72 spaces), Lawnside Road (58 spaces) and Bridge Street (52 spaces). On-street parking facilities are also located throughout Ledbury, including on High Street.

Limited cycle parking facilities were observed in Ledbury. Pedestrian accessibility is generally good throughout Ledbury, although the considerable amount of traffic that moves through the centre does reduce the ease of pedestrian movement through the centre. Although there are a number of controlled pedestrian crossing points throughout Ledbury, where these are located does not necessarily reflect pedestrian desire lines.

### Perception of Safety

In general, Ledbury is considered to be a safe and secure centre which little obvious evidence of crime, litter or anti-social behaviour. According to the website UKCrimeStats, 58 crimes were reported within a mile radius of Ledbury town centre in March 2022. This compares with 55 crimes reported in the same area in March 2021 and 55 in March 2020.

Although more central areas around High Street and The Homend benefit from a good standard of natural and passive surveillance, and high levels of pedestrian activity, areas further from the centre, including Bye Street, New Street and covered shopping areas on to the rear of The Homend, feel less secure. This is partially due to the lower levels of pedestrian activity in these areas, and thus less surveillance. However, the standard of safety even in these areas is still considered to be good.

Pedestrian safety is also somewhat compromised by the considerable amount of traffic that moves through the centre, and the narrow pedestrian footways that provide limited separation between vehicles and pedestrians in parts of Ledbury. However, as this traffic generally moves slowly through the centre, and due to the provision of controlled pedestrian crossing points, this is not considered to be a significant detrimental issue.

### Environmental Quality

The number of period and historic buildings in the town centre, including Ledbury Market House, Church Street and Church Lane and around The Homend, provide positive points of interest, and further add to the centre's

character and overall attractive appearance. Indeed, the centre's unique appearance which has developed over many years results in Ledbury having a charming character which is an attractive retail destination.

In the western part of the town centre along New Street the environmental quality is considered to be lower than in other parts of the centre. This is due to the reduced levels of vibrancy and pedestrian activity in this location, which is somewhat removed from the main 'core' of the town centre, along with fewer retailers which could provide a degree of interest.

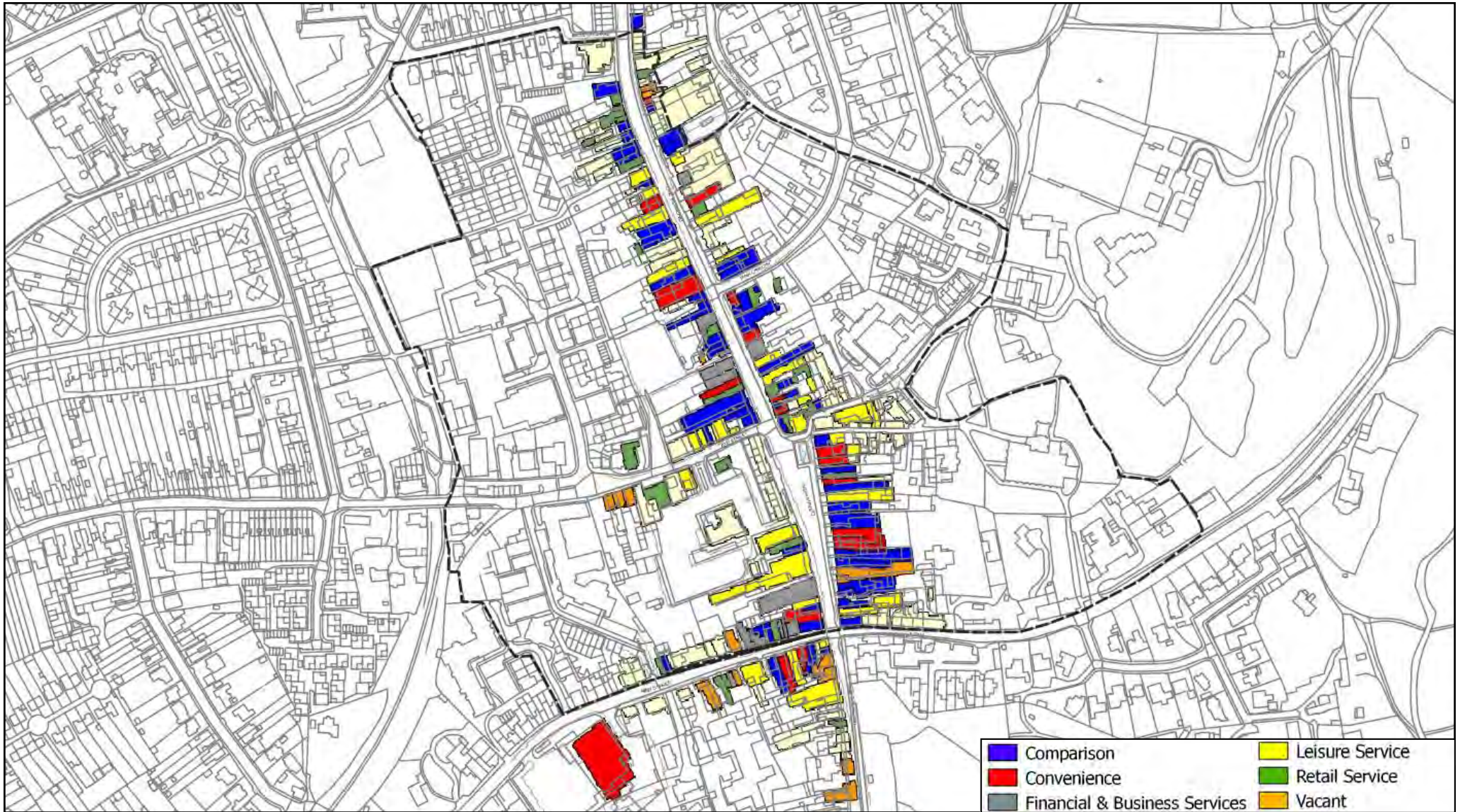
The appearance of The Homend and High Street in particular is considered to be good, with evidence of upkeep and maintenance visible. Seasonal planting, street furniture and evidence of a café culture which line High Street in this location further improve Ledbury's sense of place.

In general, Ledbury has a high standard of environmental quality which is underpinned by its combination of historic buildings and the town's pattern of development over many years. This will be further improved if the Council is successful in securing its bid for £4.7m in Levelling-Up Funding (including match funding), which will be directed towards landscaping at Ledbury Masters House and St Katharine's car park. This bid has been submitted to the Government and is currently awaiting a decision as to the outcome.

## Conclusions

As with the other market towns in Herefordshire, Ledbury has an historic retail core. This provides a characterful and attractive retail environment, although similar with other towns in the authority area the town centre lacks modern, purpose built retail premises. Notwithstanding this, the town centre provides a diverse range of operators who are considered to be easily capable of providing for the day-to-day needs of the local community. The centre has also become more diverse in recent years, with comparison goods units being successfully repurposed for service uses.

Although the vacancy rate has increased from 5.4% of units at 2012 to 9.3% at 2022, the vacancy rate remains lower than the current national average as at April 2022. These units are located in the more peripheral parts of Ledbury, with fewer vacant units located in the main retail core along The Homend and High Street. As such, Ledbury is considered to be vital and viable, and the current vacancy rate in Ledbury is not considered to represent cause for concern.



# Ledbury town centre

Herefordshire Town Centre and Retail Assessment 2022

Survey Date - May 2022

## Leominster Town Centre

### Description

Leominster is one of the larger town centres in the County, and as such provides a diverse range of retail and service operators to provide for the day-to-day needs of the local community. As with other towns in Herefordshire, Leominster is a market town focused around an historic retail core. As a result of this, the centre is dominated by independent operators due to the limited stock of modern, purpose built retail floorspace. The key advantage of this is that the town has a number of unique and characterful operators which underpin an offer which differentiates itself from other centres.

These operators also have a number of attractive shopfronts, which combined with the attractive architecture of the period and historic buildings in the town centre, add to a high standard of environmental quality throughout much of the town centre. Leominster is also considered to be highly accessible, with an easily navigable retail core for pedestrians, well related to wider public transport networks and accessible to a relatively wide catchment area.



Figure 1: Aldi foodstore on Dishley Street. Leominster has a reasonable range of convenience goods operators.



Figure 2: Corn Square provides both car parking, but also space for a frequent market and other events held throughout the year.



Figure 3: Much of Leominster town centre is formed by historic units and streets, such as High Street shown here.



Figure 4: Leominster bus station provides frequent services to a range of destinations throughout the County.

**Table 1 Town Centre Floorspace Composition**

GOAD Category	Floorspace at 2022 (sq.m)	Floorspace at 2022 (%)	Floorspace UK Average at 2022 (%)
Comparison	9,910	29.3	30.2
Convenience	4,810	14.2	15.5
Financial and Business	3,030	9.0	6.8
Leisure	6,260	18.5	25.9
Retail Service	3,890	11.5	7.2
Vacant	4,940	15.0	13.8
<b>TOTAL</b>	<b>33,770</b>	<b>100</b>	<b>100</b>

Source: Composition of Town centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of May 2022; UK Average from Experian Goad Report April 2022.

**Table 2 Town Centre Unit Composition**

GOAD Category	Units at 2022	Units at 2022 (%)	Units UK Average at 2022 (%)	Units at 2012 (%)
Comparison	72	30.4	27.0	50.3
Convenience	21	8.9	9.3	8.0
Financial and Business	22	9.3	8.9	33.7
Leisure	40	16.9	25.0	
Retail Service	41	17.3	15.7	
Other	0	0.0	0.0	3.0
Vacant	40	16.9	13.8	5.0
<b>TOTAL</b>	<b>237</b>	<b>100</b>	<b>100</b>	<b>100.0%</b>

Source: Town centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of May 2022; UK Average from Experian Goad Report April 2022; Units at 2012 taken from Herefordshire Council Town Centres Study Update 2012

## Uses

There are 72 comparison goods operators in Leominster, which equate to 30.4% of all units in the town centre. Although this represents a significant decrease on the 50.3% of units recorded at 2012, the proportion remains greater than the national average. The change in the comparison goods sector in Leominster since 2012 is reflective of changes in the wider sector over that period. Comparison operators are mostly located along High Street, Broad Street and around Corn Square, and include a range of independent operators and national multiples such as Savers, WHSmith and Boots.

Leominster Market is held every Friday in Corn Square, with traders selling a range of goods including fruit and veg, fresh fish, flowers and plants, bread, cheese, meat and pies, clothing, pet supplies and homewares. A Monthly Farmers Market is held every second Saturday between 9am and 1pm, and the Leominster Food Fayre is held annually in the Corn Square on the first Saturday in September.

Our survey recorded a total of 21 convenience goods operators, which account for 8.9% of all units in the town centre. These operators include Aldi on Dishley Street, as well as Co-op Food, Spar, Thorntons and Holland and Barrett.



The 2012 survey recorded 33.7% of operators as being in service use. Such uses, which include leisure, retail and financial and business service operators accounted for 43.6% of all units at the time of our visit. This trend, namely an increase in the proportion of service units and an equivalent decrease in the proportion of comparison goods operators, has been observed in other centres, both nationally and within Herefordshire.

**Vacancies**

Our survey recorded a total of 40 vacant units throughout the town centre. These vacant units account for 16.9% of all units in Leominster, a figure which represents a greater proportion than the current national average and an increase on the 5.0% observed at 2012.

For the most part these vacant units are located throughout the town centre, with the greater proportion being found in more peripheral areas. A significant concentration of vacant units is observed around West Street and South Street, where the Royal Oak Hotel is located. We are also aware that the Talbot Hotel, which has most recently provided accommodation to homeless people, is currently on the market. Efforts should be made to ensure that these units are brought back into active use as soon as possible. Some of these vacancies may offer potential for conversion to other uses, including residential. The loss of these facilities was highlighted by stakeholders in the context of increased AirBnB rentals in the town, competing with more established guest houses and hotels and threatening the viability of these.

**Pedestrian Flows**

At the time of our visit, generally high levels of activity were observed throughout the town centre. The greatest concentration of activity was observed around Corn Square and High Street, as well as to a lesser extent Drapers Lane and Broad Street. Generally lower levels of pedestrian activity were observed in more 'peripheral' parts of the town centre, such as along West Street, Etnam Street and South Street. In respect of West Street, the lower levels of activity are potentially the result of a greater concentration of vacant units and food and drink operators, which are likely to have opening hours which drive activity during evening hours.

The limited volume of vehicular movements through most of the town centre ensure that pedestrian movements are relatively easy, and the town centre is well connected by a series of footpaths and ginnels which link areas of Leominster and allow for easy accessibility through the town. These are also well sign posted.

Despite this, pedestrian movements to and from the town centre are somewhat challenging by virtue of the A44/B4361 which surrounds Leominster town centre to the north, west and south. Although there are a number of controlled pedestrian crossing points along this route, the volume of vehicle movements does somewhat restrict pedestrian flows. Notwithstanding this, the town centre is considered to be easily navigable by pedestrians and benefits from high concentrations of pedestrian activity at areas with the greatest concentration of retail and service operators.

**Accessibility**

The standard of accessibility, by various means of transport, is considered to be very good at Leominster town centre.

In respect of public transport, Leominster is also well served, primarily trains and buses. Accessibility by bus is very good, with bus stops located throughout the town centre. The key Leominster bus station interchange is located to the south-west of the town centre on Westbury Street. A number of bus services, including 401, 402, 403, 404, 426, 482, 489, 490, 492, 494, 495, 496, 501, 502, 504 and 507 can be accessed. These routes service a range of destinations including Hereford, Ludlow and a number of other destinations throughout Herefordshire.

Leominster train station is situated approximately 500 metres to the south-east of the town centre. Located on a key train line, with direct services to a range of destinations nationally, including Crewe, Manchester Piccadilly, Cardiff Central, Holyhead and Carmarthen, as well as more local destinations such as Hereford. Frequent services are provided throughout the day, and as such the town is considered to be well integrated into both the local and national public transport networks.

In addition to a large amount of on-street car parking located throughout the town centre, there is considerable surface level car parking provided throughout Leominster. These include 269 spaces at Broad Street, 163 spaces at Etnam Street, 79 spaces at Central Area and 64 spaces at Dishley Street. Although these car parks are pay-and-display, car parking is free beyond the hours of 8am-6pm from Monday through to Friday. The centre is therefore considered to be easily accessible by private vehicle, with these car parks also being well related to the town centre and the key retail core.

Pedestrian accessibility is generally good throughout the core of the town centre, largely by virtue of the limited traffic movements through this location and occurrence of some pedestrianised areas. Although movements across the key routes that run around the edge of the town centre (Westbury Street, Dishley Street, Cursneah Road and New Street) can be challenging due to the number of passing vehicular movements. Although there are a number of controlled pedestrian crossing points along these routes, pedestrian movements are more limited due to the amount of traffic in these locations. Numerous bike stands are located throughout the town centre. Overall, Leominster town centre is considered to be a highly accessible centre.

**Perception of Safety**

Leominster town centre is a key retail destination in the north of the County, with a considerable concentration of pedestrian activity and active ground floor uses. By virtue of this, the town centre generally feels safe and secure. The level of activity and general vibrancy of the town centre, particularly along High Street and around Corn Square also ensure that there is a high standard of both natural and passive surveillance in the main areas of the centre. Open shop fronts add to an overall high perception of safety. The standard of security is somewhat lesser in more peripheral parts of the centre which have a generally lower level of activity and therefore

less surveillance, increasing the chances of criminality in these locations. According to the website UKCrimeStats, 132 crimes were reported within a mile radius of Leominster town centre in March 2022. This compares with 96 crimes reported in the same area in March 2021 and 120 in March 2020.

Within the core of the town centre pedestrian safety is considered to be very high. This is largely due to the lack of traffic moving through central areas of Leominster. However, the volume of traffic on routes surrounding the town centre does reduce the overall perception of pedestrian safety for those walking to and from the town centre. Furthermore, the relatively narrow width of the pedestrian carriageway in parts of the town centre does reduce the perception of pedestrian safety by forcing users to walk often relatively close to the road and vehicle movements.

### **Environmental Quality**

Leominster's appearance, with a number of attractive and characterful period buildings, provides a unique and interesting retail setting. The area around Corn Square (which is also the location of the Leominster Street Market), along High Street and Broad Street is considered to be a particularly attractive area with a high standard of environmental quality. The wide carriageway of Broad Street, with a number of attractive shop fronts and landmark buildings, provides a sense of arrival into the town centre from the north. Areas to the south and west, along West Street and South Street, have a lower standard of environmental quality when compared to other parts of Leominster. However, these areas still benefit from a number of period buildings, although the reduced level of vibrancy, pedestrian activity and greater concentration of vacant units in this location (such as the vacant Royal Oak Hotel and Talbot Hotel) negatively influence these areas. These areas appear to be somewhat more tired in their overall appearance. As such, it is thought that they would benefit from additional investment to improve their appearance relative to other areas.

It is noted that the Council have submitted a bid for £4.7m in Levelling-Up Funding (including match funding), which in Leominster will be directed towards Corn Square regeneration and Public Realm projects and the Old Priory / Innovation Hub. This bid has been submitted to the Government and is currently awaiting a decision as to the outcome. The town is also benefiting from the multi-million pound High Street Heritage Action Zone (HSHAZ) Fund through improvements to public spaces, with a focus on Corn Square and a number of other improvements to historic buildings and spaces across the town.

Despite a being generally attractive centre with a good standard of environmental quality, the volume of traffic movements through parts of the town centre does negatively influence the overall appearance of Leominster. However, this activity is peripheral to the main core of Leominster, so its impact upon the central retail area is limited. As such, Leominster is considered to have a high standard of environmental quality.

### **Conclusions**

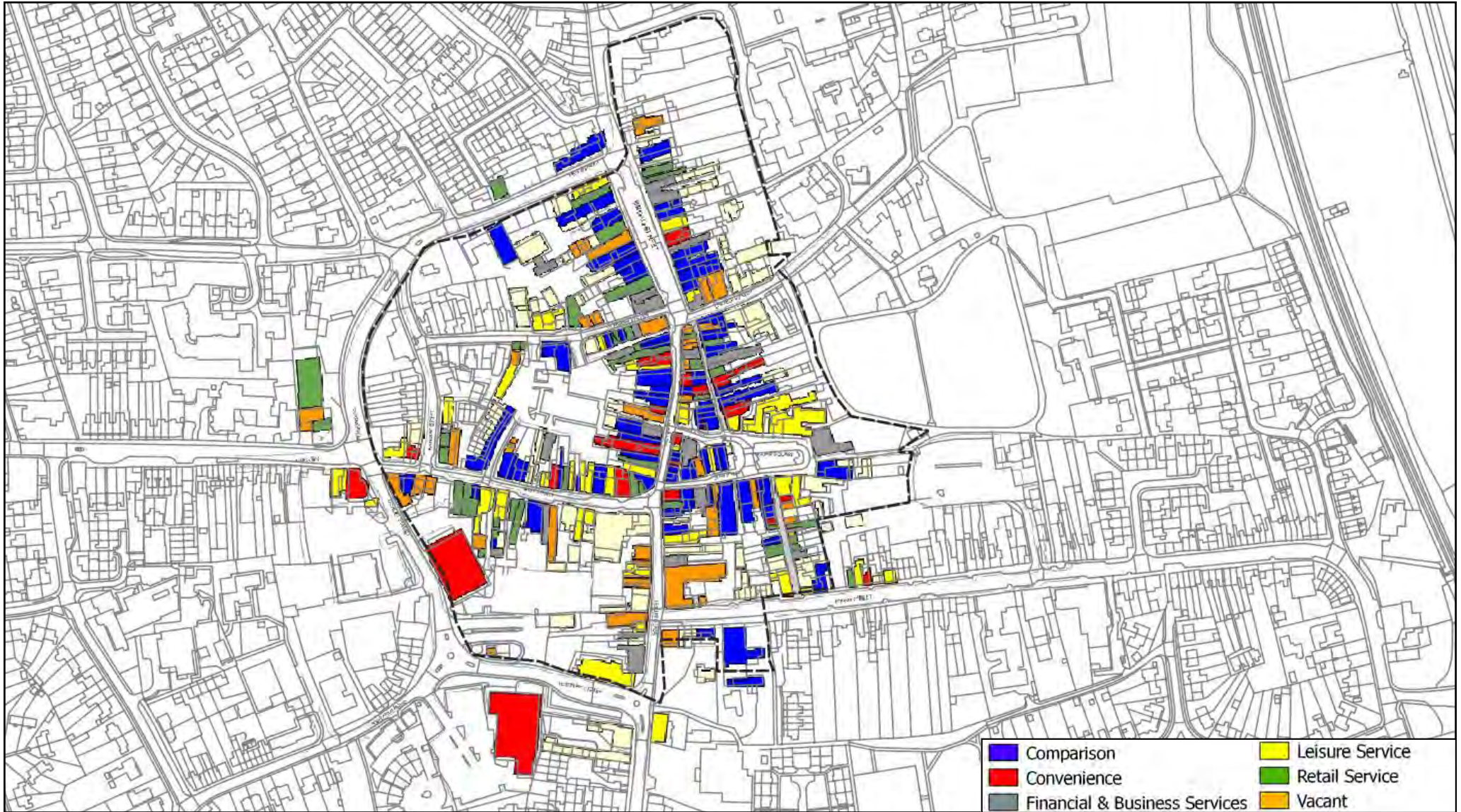
Leominster is one of the larger retail destinations in Herefordshire, and provides a diverse range of retail and service operators to provide for the

day-to-day needs of the local community. The town centre is dominated by independent operators due to the limited stock of modern, purpose built retail floorspace. The key advantage of this is that the town has a number of unique and characterful operators which underpin an offer which differentiates itself from other centres.

Our land use survey identified that 16.9% of units are currently vacant, which is substantially higher than the vacancy rate of 5.0% observed at 2012.

The units are generally located in the more peripheral parts of the town centre and, whilst it will important to ensure that the vacancy rate does not further increase, Leominster is found to be a reasonably vital and viable centre.

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# Leominster town centre

Herefordshire Town Centre and Retail Assessment 2022

Survey Date - May 2022

## Ross-on-Wye Town Centre

### Description

Situated within the Wye Valley AONB, Ross-on-Wye is an historic and attractive market town. Indeed, Ross-on-Wye has been voted the UK's best-loved market town. These factors help to drive a significant tourist population through the town, with the town promoting itself as 'the birthplace of British tourism'. However, despite a large tourist population, Ross-on-Wye also provides an offer focused on meeting the day-to-day needs of the local community.

The town centre's comparison goods offer has remained robust since 2012, and represents a proportion far in excess of the current national average. It is therefore clear that the town centre performs a key role in meeting comparison goods needs, both for the local community and the tourist population. The convenience goods offer in the town centre is strong, and is anchored by a number of key foodstores. As such, Ross-on-Wye also successfully performs a role as a key service centre.



Figure 1: Croft Court Shopping Centre provides an attractively maintained area of public realm, situated away from the main retail core of the town centre.



Figure 2: The Market House, at the centre of Ross-on-Wye town centre, is an attractive building reflective of the town's historic development.



Figure 3: The retail parade along Gloucester Road is the focus of many national multiple comparison goods retailers, and provides modern, purpose-built floorspace.



Figure 4: The Aldi foodstore on Brookend Street. The town centre is underpinned by a strong range of convenience goods operators, particularly in respect of floorspace.

**Table 1 Town Centre Floorspace Composition**

GOAD Category	Floorspace at 2022 (sq.m)	Floorspace at 2022 (%)	Floorspace UK Average at 2022 (%)
Comparison	14,000	35.4	30.2
Convenience	9,410	23.8	15.5
Financial and Business	2,560	6.5	6.8
Leisure	6,790	17.2	25.9
Retail Service	4,370	11.0	7.2
Vacant	2,440	6.2	13.8
<b>TOTAL</b>	<b>39,570</b>	<b>100</b>	<b>100</b>

Source: Composition of Town centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of May 2022; UK Average from Experian Goad Report April 2022.

**Table 2 Town Centre Unit Composition**

GOAD Category	Units at 2022	Units at 2022 (%)	Units UK Average at 2022 (%)	Units at 2012 (%)
Comparison	94	40.7	27.0	40.6
Convenience	19	8.2	9.3	8.0
Financial and Business	24	10.4	8.9	33.5
Leisure	40	17.3	25.0	
Retail Service	37	16.0	15.7	
Other	0	0.0	0.0	1.9
Vacant	17	7.4	13.8	16.0
<b>TOTAL</b>	<b>231</b>	<b>100</b>	<b>100</b>	<b>100.0%</b>

Source: Town centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of May 2022; UK Average from Experian Goad Report April 2022; Units at 2012 taken from Herefordshire Council Town Centres Study Update 2012

## Uses

The comparison goods offer in Ross-on-Wye is considered to be diverse. The town centre's comparison goods offer has 'bucked the trend' and has remained consistent since 2012. There are 94 comparison goods operators in the town centre, which account for 40.7% of all operators in the town. This represents a figure broadly similar to that observed at 2012, and a proportion far in excess of the current national average. It is therefore clear that the town centre performs a key role in meeting comparison goods needs, both for the local community and the tourist population. As such, operators include both day-to-day operators, such as pharmacies, florists, clothing shops, newsagents and The Agricultural department store, but also more specialist retailers such as antique shops, ceramic retailers and fitted kitchen retailers. Although the mix of comparison operators is generally good, stakeholders reported a concern about the proportion of charity shop operators in Ross-on-Wye.

Ross-on-Wye is an historic market town, and twice weekly markets are still held every Thursday and Saturday between 9am and 3pm. Thursday traders sell a range of goods including flowers & plants, fruit & veg, fish and clothing, whilst the Saturday market specialises in local crafts and foods, with a variety of goods for sale.

There are 19 convenience goods operators, which account for 8.2% of all units in the town centre (however, by virtue of these units being relatively large in size, the proportion of convenience goods floorspace is equivalent to 23.8% of the total stock of retail floorspace). The convenience goods offer is anchored by Morrisons, Sainsbury's and Aldi alongside a number of smaller convenience operators.

Mirroring the decrease in the town's vacancy rate since 2012, the proportion of service operators has increased from 33.5% at 2012 to 43.7% at 2022. These operators are focused both on providing for the day-to-day needs of the local community, as well as operators focused on meeting tourist needs such as restaurants, public houses and cafés.

### **Vacancies**

At 2012, 16.0% of all units in the town centre were recorded as being vacant at that time. Since then, there has been a substantial decrease in the vacancy rate in respect of units at Ross-on-Wye, with 17 vacant units in the town centre accounting for just 7.4% of all units. This figure, not only representing a decrease from the 2012 vacancy rate, is substantially lower than the current national average for vacant units, which is 13.8%.

With the exception of a number of vacant units along New Street, which is a more peripheral location within the town centre, these vacant units are located throughout the town centre such that no one part of the main retail core of Ross-on-Wye feels as 'dominated' by vacant uses.

As such, the current vacancy rate is not considered to represent cause for concern as the town benefits from a high standard of vitality.

### **Pedestrian Flows**

At the time of our visit, both pedestrian activity and footfall were considered to be healthy. This activity was concentrated along Broad Street and around The Market House, with more limited levels of activity observed on High Street and Gloucester Road. However, in general pedestrian activity varies considerably throughout Ross-on-Wye, with significantly lower levels of activity observed in the peripheral parts of the centre.

During our visit, a moderate number of linked trips were observed between the Morrisons foodstore and the main retail core of Ross-on-Wye. The limited activity beyond Broad Street can potentially be attributed to the level of vehicular traffic that moves through the centre, with this forming a barrier to safe and straightforward pedestrian movements. The limited activity in peripheral parts of the centre, can also be attributed to the narrow pedestrian footways, particularly along High Street and the fact that the Morrisons foodstore 'turns its back' on the retail core of Ross-on-Wye.

The majority of people are considered to access the centre by car, with the car parks observed to be very well used at the time a survey was completed.

### **Accessibility**

Ross-on-Wye is considered to have a good standard of accessibility in respect of public transport and private vehicles. The town is situated at the end of the M50 motorway, and as such is well related to both the local and



national road networks. There are a number of pay-and-display car parks located within or just beyond the defined boundary of the centre. These include Red Meadow (126 spaces), The Maltings (107 spaces) Kings Acre Upper (78 spaces), Corn Exchange (55 spaces), Edde Cross Street (49 spaces) and Kings Acre Lower (44 spaces), as well as a large surface car park for customers to the Morrisons foodstore. Cycle parking facilities, mostly in the form of Sheffield stands, are located throughout the centre.

Due to the historic nature of the town centre and the narrowness of the roads that move through Ross-on-Wye, bus movements are restricted through Ross-on-Wye. Bus stops are located along Cantilupe Road and Station Street to the east of the town centre. From these stops, a number of services including 31, 32, 33, 34, 35, 40, 40A, 44 and 459 can be alighted. These services provide frequent access to a range of destinations including Hereford, Gloucester, Greytrees, Cinderford, Kings Thorn and Monmouth.

Pedestrian accessibility is considered to be good. Pedestrianised areas, such as Croft Court Shopping Centre, and wide pedestrianised areas around The Market House, provide safe environments for those on foot. Elsewhere in the town centre, the narrowness of the road carriageway and the volume of vehicular movements that pass through the centre of Ross-on-Wye reduces the ease of safe pedestrian movements.

#### Perception of Safety

Ross-on-Wye has a good sense of security within the centre provided by a well maintained environment, free from litter or signs of deterioration. The car parks as such have the perception of being safe and secure. The centre is overlooked in most locations, and benefits from considerable standards of both natural and passive surveillance. Areas such as Broad Street and Gloucester Road have an open feel, located close to the activity associated with the main retail core and with good visibility of the surroundings.

Although the centre generally feels safe and secure, the volume of vehicular movements that pass through the centre of Ross-on-Wye impacts negatively on the overall standard of pedestrian safety. However, the wide pedestrian footways along Gloucester Road and the lower levels of vehicular activity in this location ensure that pedestrian safety is good in this location.

According to the website UKCrimeStats, 117 crimes were reported within a mile radius of Ross-on-Wye town centre in March 2022. This compares with 72 crimes reported in the same area in March 2021 and 107 in March 2020.

#### Environmental Quality

Ross-on-Wye is focused around an historic retail core, and is considered to be an attractive town which provides a pleasant retail environment. The town has a long history, with the Market House at the core of the centre dating from between 1650 to 1654. Accordingly, many of the buildings within the town centre are of a historic nature and a considerable proportion are listed. Specific buildings, including The Church of St Mary the Virgin, provide a positive contribution towards the centre's overall environmental quality. Almost the entirety of the town centre is located

within a defined Conservation Area, which is considered to be reflective of both the historic and attractive nature of the town.

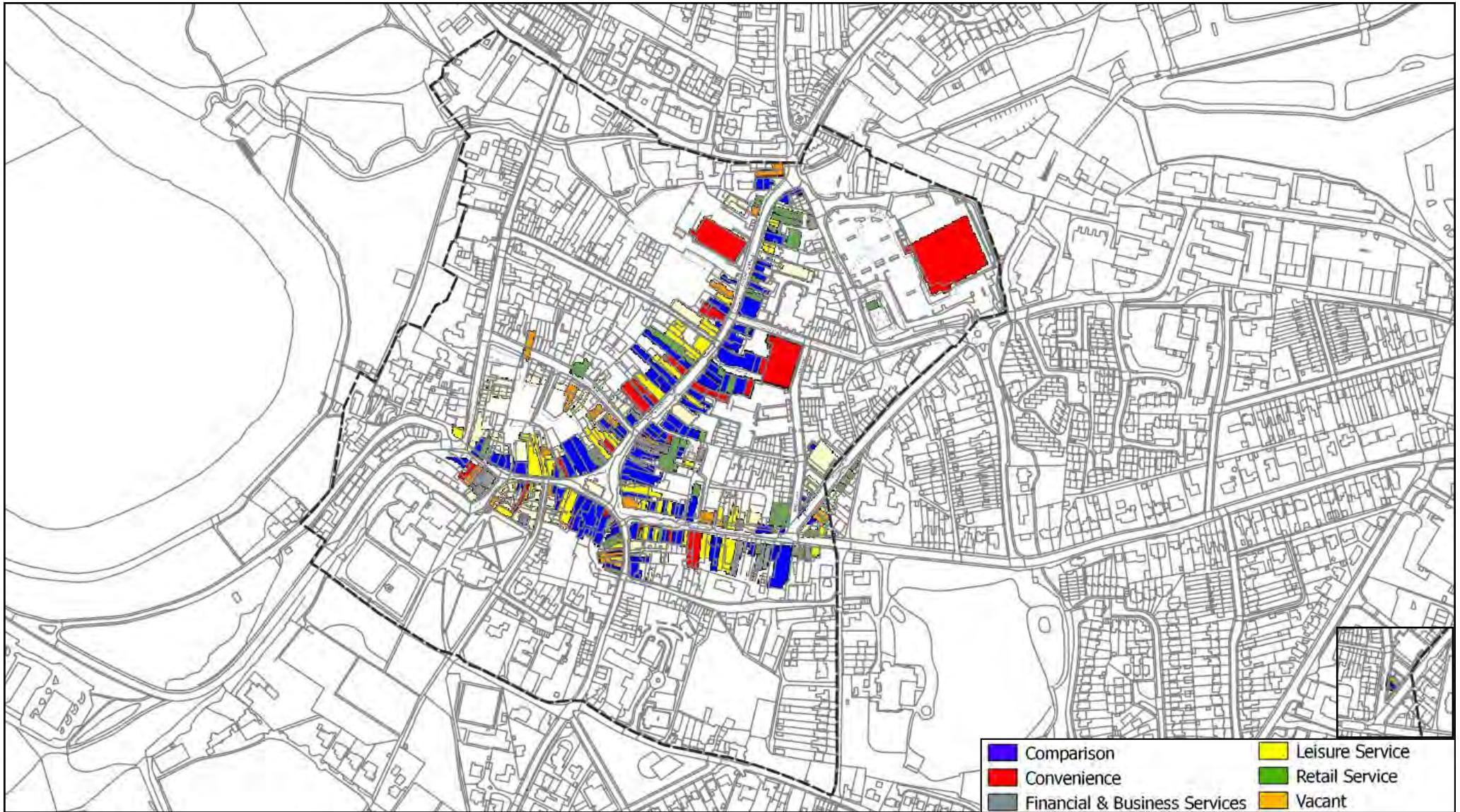
The centre is generally well maintained, as are the retail units themselves. There are seasonal planters and street furniture located throughout the centre. The public realm in the surroundings is again well planned and maintained, with clear signposting around the centre. Evidence of investment in public realm is clear, and has improved the overall appearance and character of the centre. These areas are of a simple design and provide opportunities for seating and café culture. No apparent environmental issues relating to anti-social behaviour or vandalism were observed. Notwithstanding this, some stakeholders felt that the overall level of cleanliness in the town centre was relatively poor, and would benefit from increased street sweeping and pressure-washing.

However, a negative contributor to the environmental quality of Ross-on-Wye is the volume of passing traffic through the centre. This is exacerbated by the narrow nature of the roads in the parts of the centre, which result in some congestion. Although pedestrianisation of (at least part of) the town centre was mentioned by stakeholders, it is understood that there could be concerns about the impacts this may have on the trading ability of established operators.

## Conclusions

A historic and attractive market town, Ross-on-Wye has been voted the UK's best-loved market town, considered to be 'the birthplace of British tourism', the town centre benefits from considerable tourist activity, and as such meets the needs of this population as well as those of the local community.

The town centre's comparison goods offer has remained robust since 2012, and represents a proportion far in excess of the current national average. Furthermore, the town's vacancy rate has declined substantially since the 2012 survey, accounting for just 7.4% of all units. This substantial decrease in the town's vacancy rate, as well as its clear role in meeting the needs of the tourist and local communities is such that Ross-on-Wye is considered to be a highly vital and viable centre.



## Ross-on-Wye town centre

Herefordshire Town Centre and Retail Assessment 2022

Survey Date - May 2022