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Herefordshire Council

Herefordshire Town Centres PPS4 Assessments

Paper 4. Retail and Leisure Need Assessment

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Contents

1 Introduction

1.1 In accordance with the Consultants' Brief dated June 2007, this is one of five Papers to form part of the evidence base supporting retail and town centre policies within the Herefordshire Local Development Framework (LDF). The majority of the technical work and surveys were undertaken in Autumn 2007. Any subsequent updates are referenced as such in the reports.

1.2 This Paper is concerned with the potential for further town centre uses (including retail, leisure, bars and restaurants and offices) within the identified Study Area. It provides an assessment of the broad quantum of floorspace for town centre uses that could be supported within the Study Area and Sub-zones, with a particular emphasis on retail development.

1.3 The quantitative assessments use a base date of 2007, consistent with household telephone surveys and street surveys undertaken in November 2007 as well as Drivers Jonas Deloitte field surveys undertaken in Autumn 2007. However, because of major changes in national economic forecasts and the retail market since then, as well as changing housing requirements, we have updated some of the inputs to the assessments as at July 2010. These are described in Section 2.

2 Retail Assessment – Methodology and Study Area

2.1 This section describes the approach that has been adopted in making forecasts for new convenience and comparison goods retail floorspace within the County.

Methodology

2.2 A step by step methodology to the quantitative assessment for both the convenience and comparison goods sectors has been adopted. The approach is summarised below:

- Establish the population of the Study Area and each of its Sub-zones;
- Establish the expenditure per capita of population of each Zone within the Study Area for both convenience and comparison goods (all categories);
- By a combination of steps (i) and (ii) establish the available expenditure of the Study Area for both convenience and comparison goods (all categories);
- Identify the market share of each centre/store within the Study Area (and significant facilities outside the Study Area) from the household telephone survey; and then assess the flow of expenditure to each location by applying market shares to available expenditure, step (iii);
- Identify the existing floorspace and approved schemes within and immediately outside the Study Area together with their turnovers;
- Compare available expenditure (step iii) with the flow of expenditure and turnover of the existing facilities (steps iv and v), in order to assess any surplus expenditure; and
- Convert any surplus expenditure to floorspace, in order to provide an indication of need for further provision.

2.3 The convenience and comparison goods analyses have both been undertaken on a 'goods' basis, utilising the most up to date population and retail data available (from Experian using the Census 2001 where relevant).

2.4 The definitions of convenience and comparison goods used within the assessments follow the industry recognised classifications.

Convenience goods comprise the following listed items:

- Food;
- Alcoholic drink;
- Tobacco;
- Newspapers and magazines; and
- Non-durable household goods.

Comparison goods comprise:

- Books;

- Clothing and footwear;
- Furniture, floorcoverings and household textiles;
- Audio-visual equipment and other durable goods;
- Hardware and DIY supplies;
- Chemists' goods;
- Jewellery, watches and clocks;
- Bicycles;
- Recreational goods; and
- Other miscellaneous goods.

2.5 All monetary figures in the assessments are expressed in 2006 prices.

2.6 The assessments use a base year of 2007, with the following forecast years - 2011, 2016, 2021 and 2026.

2.7 The retail analyses draw on the results of a household telephone survey undertaken in November 2007, and the shopper surveys for the main centres also undertaken in November 2007.

2.8 It should be noted that projections of expenditure over a lengthy period are subject to margins of error. Our forecasts up to 2016 are based on the most recent estimates provided by Experian in their Retail Planner Briefing Note Update (August 2009). These forecasts take into account the recent economic downturn and indicate lower average growth rates up to 2016 than have previously been experienced, including some years with negative growth.

2.9 The period 2016-2026 is subject of the greatest uncertainty. We have taken a cautious view on expenditure growth in this latter part of the plan-period, and have had regard to the previous long term rates that have been achieved indicated in research by both Experian and MapInfo. Our forecasts are cautious, on the basis that they will be monitored regularly in order to ensure that they remain up-to-date and reliable. We believe that it is prudent at this stage to take a cautious rather than optimistic approach. We identify below the specific rates that we have used.

2.10 Both the convenience and comparison goods assessments adopt a constant market share approach. They assume that the share of expenditure attracted to existing shopping facilities within and outside the Study Area (as deduced from the Interview Surveys) will remain constant over the forecast period. In our view it is appropriate to adopt this approach for the purpose of plan making. However, it may well be that within Hereford City Centre in particular, the market share for comparison goods expenditure will increase if a major new shopping scheme is implemented, and the overall draw of the City as a shopping destination is enhanced. This is a matter that can be tested in the context of specific proposals.

Study Area

2.11 The capacity assessment utilises data for a Study Area, which is defined broadly by the Herefordshire County boundary, but adjusted to reflect more accurately existing retailing patterns. The Study Area is illustrated in Appendix 1.

2.12 The survey area has been divided into six Zones for the purposes of analysis. Herefordshire's key centres within each Zone are as follows:

- Zone 1 - Hereford (comprising Sub-zone 1A (Hereford City) and 1B (Hereford Rural)
- Zone 2 - Kington

- Zone 3 - Leominster
- Zone 4 - Bromyard
- Zone 5 - Ledbury
- Zone 6 - Ross-on-Wye

2.13 Zone 1 is subdivided into two smaller Sub-zones, 1A and 1B. Zone 1A covers those postal sectors that include built-up areas of Hereford City. The elongation of Zone 1A to the south is caused by post-code anomalies. Zone 1B covers a large area of rural Herefordshire surrounding Hereford City. It extends as far as the Welsh border in the west, but contains no retail centres of significant size, and residents are clearly dependent upon Hereford City for most retail purchases.

Population Estimates and Forecasts

2.14 Table 1 within the convenience and comparison assessments at Appendix 2 & 3 sets out the population data for the Study Area.

2.15 The base year (2006) population figures for the Study Area Zones have been established using data from Experian Local Area Retail Expenditure Reports obtained in November 2007. Experian data is based upon the 2001 Census and is adjusted annually with mid-year estimates.

2.16 The population figures to 2026 take account of housing growth/distribution identified within Herefordshire Core Strategy ‘Place Shaping’ Document (as per the Regional Spatial Strategy Phase 2 Preferred Strategy). For the market towns this equates to growth over the plan-period to 2026 of 8,500 dwellings in Hereford, 2,500 dwellings in Leominster, 1,000 dwellings in Ledbury, 1,000 dwellings in Ross on Wye, 500 dwellings in Bromyard and 200 dwellings in Kington.

2.17 Additional housing growth in rural areas is based on Rural Service Centre/Hub allocations identified by Herefordshire Council in June 2010. The remainder of unallocated rural growth (2,600 dwellings) has then been apportioned to Zones 1B to 6 pro-rata to their 2006 population.

2.18 As the Study Area differs from the County boundary, and population base figures for the Zones are taken from Experian base data, there are inevitably some differences between the Study population forecasts and County demographic projections. In order to address these differences, and reflect the detailed demographic inputs used in the County forecasts, such as natural change and growth rates, the household density rates used in the Study have been adjusted to give a population change within the Study Area that is consistent with the forecast population growth contained in the detailed population statistics provided by the Council in July 2010 (a net rise of 20,000 between 2008 and 2026).

3 Convenience Goods Retail Capacity

3.1 This section provides an assessment of the economic scope to accommodate further convenience goods retail development within the key settlements of Hereford, Leominster, Ledbury, Ross-on-Wye, Kington and Bromyard.

Expenditure per Capita Estimates and Forecasts

3.2 2006 convenience goods expenditure per capita estimates for the Study Area have been obtained from Experian Local Area Retail Expenditure Reports (November 2007) and are set out in Table 2 of Appendix 2. We have used convenience goods expenditure per head capita figures specific to each Survey Zone. The base year for the data is 2006 (in 2006 prices). This was the most recent data available from Experian at the time of the original Study and household surveys.

3.3 Retail expenditure per capita from 2006-2007 grew by +2.1% (Experian Retail Planner Briefing Note 6.1, paragraph 3.4.2). The forecast growth rate for the period 2007-2026 has been obtained from Experian Retail Planner Briefing Note 7.1 (August 2009) Figure 1. This shows minimal growth and some years of decline up to 2011, and trend growth of +0.8% and +0.9% in the periods 2012-2016 and 2017-2026 respectively.

3.4 Expenditure absorbed by non-store retail trade (NSRT) has been deducted according to the latest national Experian estimates in Retail Planner Briefing Note 7.1. The percentage reductions do not remain constant and increase from +2.5% in 2006 to +5.9% in 2026.

3.5 Experian defines NSRT as purchases via mail order (including purchases from wholly internet-based companies), purchases from market stalls and purchases from door-to-door salesman. They comment in Retail Planner Briefing Note 7.1 that, because the non-store retailing figures include supermarkets that source internet goods sales from store sales floorspace areas, some internet sales do actually make demands on the floorspace of retail outlets particularly for convenience goods.

3.6 Drivers Jonas Deloitte has grown the 2006 expenditure per capita estimates to provide expenditure per capita forecasts for the period 2007 to 2026.

Available Convenience Expenditure

3.7 Estimates of available convenience expenditure are set out in Table 3 of Appendix 2. These are derived by applying the average expenditure per head figures (Table 2) to the population estimates (Table 1) for each of the forecast years. Estimates for the Study Area as a whole are also provided.

3.8 In addition Table 3 shows expenditure growth over time, as well as the percentage change. For the period 2007-2016 expenditure is forecast to grow by £25.6m, a growth of 9%. Over the period 2007-2026, it is forecast to grow by £74.2m, a growth of 27%. The table below summarises the total available convenience goods expenditure in the Study years of 2007, 2011, 2016, 2021 and 2026.

Table 3.1: Total Available Convenience Goods Expenditure (£m)

	2007	2011	2016	2021	2026
Convenience Spending Power	£274.5m	£281m	£300m	£323.6m	£348.6m
Expenditure Growth		£6.5m	£25.6m	£49.2m	£74.2m
Cumulative Expenditure Growth		2%	9%	18%	27%

Expenditure Flows

3.9 The percentage market shares achieved by each centre/store within the Study Area and the resulting flows of convenience goods expenditure to these centres/stores is shown in Tables 4, 5, 6 and 7.

3.10 Expenditure flows within the Study Area were calculated for all the principal stores/centres within each of the Study Area Zones. Expenditure flows from the Study Area to major stores outside the Study Area, including the Waitrose stores at Great Malvern and Monmouth, and the Tesco store at Gloucester, were also calculated.

3.11 The Interview Surveys identified the first choice and second choice shopping destinations for convenience shopping. 70% of residents' expenditure was allocated to their first choice shopping destinations and 30% to their second choice destinations. The total expenditure flow to centres/stores was derived by summing the expenditure to a centre/store from respondents' first and second choices. The Household Survey provided information on expenditure flows to a centre/store both from within its home Zone and from other Study Area Zones (inflow).

3.12 An allowance was also made for inflows of expenditure from outside the Study Area, to the centres/stores within the Study Area. Information on this was derived in part from the On-street Interview Surveys in Hereford City and the market towns, and in part was based on judgement.

3.13 The outputs of this analysis are shown at the base year 2007 in Table 8. The outputs for the other forecast years 2011-2026 are shown in Tables 9 to 12. Expenditure flows (market shares) are assumed to remain constant over the forecast period.

Turnover of Existing Stores/Centres

3.14 Convenience Table 13 shows the floorspace and estimated benchmark turnovers of the convenience goods floorspace of the existing food store provision within the Study Area.

3.15 The floorspace data for the existing food stores within the Study Area has been obtained from the IGD Foodstore Database (2007) and from Promap (2008). The net/gross floorspace ratios of the facilities are Drivers Jonas Deloitte estimates, unless otherwise known from IGD.

3.16 Verdict on Grocers (2007) and Retail Rankings (2007) has been utilised to identify the convenience/comparison goods floorspace split and the sales density of named retailers. The sales densities from Retail Rankings (in 2005 prices) have been converted to 2006 prices in line with Experian advice in the Retail Planner Briefing Note 5.1 (2007). Although more recent data is available in subsequent Verdict and Retail Rankings publications, we have retained the figures based on 2007 information so as to be consistent with the other base year information in the Study.

3.17 The floorspace of 'other convenience stores' and 'local stores' within the Centres/Zones, is based on GOAD floorspace and Drivers Jonas Deloitte estimates.

3.18 Table 14 provides a summary of 'benchmark' turnovers of the centres derived from the average sales densities, and compares this with the 'actual' turnover of the centres derived from the analysis of the survey responses. This analysis illustrates that the centres are achieving a turnover broadly comparable to their benchmark levels. It should be noted, however, that the overall figures for centres are made up of varying performance figures for individual stores. For example within Hereford City the Tesco store at Abbotsmead Road is trading well, but this is offset by the ASDA store which is under-trading according to our survey analysis.

3.19 The survey results indicate that Leominster is trading well and that this has been caused by above average performance of both the Morrisons and Somerfield stores.

3.20 Within the other market towns, although Ross on Wye as a whole is broadly in balance, the survey results (not shown) reveal that this is predominantly due to the performance of both the Morrisons and Somerfield stores (now operated by Sainsbury's). Whilst these stores are trading well, other stores in the town, such as the Co-Operative are actually trading below benchmark. This situation is similar in Ledbury and Kington.

Commitments

3.21 The estimated turnover of commitments for convenience goods floorspace within the Study Area is shown in Convenience Table 15. Information on the commitments (as of July 2010) has been provided by Herefordshire Council.

3.22 Of particular note is a proposed Aldi store of some 1,550 sq m (gross) located within Ross-on-Wye (Zone 6), as well as extensions for the existing Morrison's stores in Ross on Wye and Leominster. The remaining commitments are minor schemes.

3.23 The emerging Edgar Street Grid proposals for the livestock market in Hereford City are identified separately within the capacity assessment (shown in Convenience Table 16). In making this assessment, based on recent discussions with officers of the Council, we have assumed the development of a circa 3,500 sq.m. gross / 2,450 sq m net foodstore, with a convenience goods / comparison goods split of 85% / 15%, and with a sales density of £11,500 per sq m, which is reflective of a quality food retailer.

Expenditure and Floorspace Capacity

3.24 Convenience Table 16 sets out the capacity position for Hereford and each of the market towns. The analysis is based upon the earlier assessment of:

- catchment populations;
- available expenditure;

- the market shares of available expenditure achieved by each settlement (retained expenditure); and
- and expenditure inflows.

This enables an estimate of the 'actual' turnovers of Hereford City and the five market towns to be made.

3.25 The market shares of expenditure achieved by Hereford City and the market towns from their catchment areas (shown in brackets) are given in the table below.

Table 3.2: Market Share for Hereford and the Market Towns at 2007

	Hereford (Zone 1)	Kington (Zone 2	Leominster (Zone 3)	Bromyard (Zone 4)	Ledbury (Zone 5)	Ross (Zone 6)
Market Share	89%	53%	75%	43%	79%	67%

3.26 Table 3.2 indicates that Hereford City retains a large proportion (almost 90%) of the convenience expenditure within its immediate catchment area - Zones 1A and 1B, indicating the strength of convenience retail facilities within the City.

3.27 For the market towns, the picture is somewhat different. The larger centres of Leominster, Ledbury and Ross on Wye retain a high proportion of their convenience expenditure. However Kington and Bromyard retain only circa half their convenience expenditure.

3.28 In the larger centres with the highest market shares, the residual expenditure (not attracted to the centres) is likely to be expenditure outflows to competing centres/facilities elsewhere from the fringes of their catchments. In the case of the smaller centres there are more widespread expenditure outflows elsewhere, particularly to Hereford City. In all Zones a small element of residual expenditure will also be attracted to village shops.

3.29 In order to arrive at estimates of surplus expenditure any turnover from commitments is added to the turnover estimates of existing shops, and the resulting 'actual' turnover is compared with the 'benchmark' turnover estimates. All of this information at 2007 is derived from earlier tables.

3.30 Benchmark turnovers have been grown over the period 2006-2026 on a variable rate, which equates to half of the expenditure growth rate. This assumption allows for existing retailers to increase their productivity and sales densities during years of positive convenience expenditure growth.

3.31 The difference between 'actual' turnover and 'benchmark' turnover at the 2007 and the forecast dates represents 'surplus' expenditure, which is shown for Hereford City and each of the market towns.

3.32 The final part of Table Convenience 16 illustrates the surplus expenditure in terms of a floorspace equivalent under two scenarios. The first 'Discount Store' scenario provides a floorspace equivalent, assuming a low turnover /sq m based on the 'discount food store' sector of the convenience market. The second 'Quality Store' scenario provides a floorspace equivalent taking the average turnover density of the 'top four' convenience store retailers.

3.33 Table 16 shows that there is no expenditure surplus and therefore no floorspace requirements for Hereford City at 2007 or 2011. Despite the a rise in available expenditure post 2011, all available capacity is absorbed by existing commitments and the Edgar Street Grid proposals and therefore there no additional floorspace requirement is indicated up to 2026.

3.34 Table 3.4 shows the gross floorspace requirements for the market towns at 2007, 2021 and 2026. The floorspace requirements are shown as a range between the low and high scenarios.

Table 3.4: Floorspace Requirements (gross sq m) for the Market Towns

	2007	2021	2026
Kington (Zone 2)	111 to 302	211 to 573	263-715
Leominster (Zone 3)	950 to 2,584	1,113 to 3,028	1,377-3,744
Bromyard (Zone 4)	0	0	0
Ledbury (Zone 5)	88 to 238	407 to 1,108	581-1,581
Ross-on-Wye (Zone 6)	114 to 311	0	0

Findings

3.35 The assessment illustrates that after commitments, there is capacity for further convenience goods floorspace within Hereford (post 2016), Kington, Leominster and Ledbury.

Hereford City – Zone 1

3.36 Zone 1 representing the convenience goods expenditure catchment of Hereford City, contains some 60% of the Study Area population and therefore the bulk of the Study Area available convenience goods expenditure. This in turn is reflected by the wide range of convenience goods facilities in both in the City Centre and non City Centre locations in Hereford.

3.37 In overall terms the relatively limited quantitative need for new convenience floorspace by 2016 will be absorbed by commitments and the assumed implementation of the Edgar Street Grid proposals. Furthermore, as a result of implementation of these schemes, no additional quantitative need for new convenience floorspace is shown throughout the rest of the forecast period up to 2026. However, this finding in respect of theoretical quantitative capacity does not make allowance for any changes in trading patterns that would be brought by a new supermarket as part of the Edgar Street Grid proposals, including any competitive impact on existing supermarkets, nor for any consequential changes in the market share of convenience goods expenditure that might be attracted to the City. The latter point is considered more fully in the context of comparison trading in Section 4.

3.38 In addition there will be a need to provide for some new convenience facilities close to residential areas as part of any major housing expansion area proposals within Hereford City.

Market Towns

3.39 Analysis of the market towns indicates that Leominster (Zone 3) contains the highest level of theoretical capacity. The town has a strong market share achieving an expenditure surplus of circa £8m at 2007, falling to £5.4m in 2011 (see below) and recovering to £7.4m in 2016. The capacity reaches £9.9m in 2021 and grows further to £12.5m in 2026. At the base year of 2007 the level of growth translates into capacity for circa 921-2,505 sq m (gross). Some of this capacity is then absorbed by the planning consent for an extension to the Morrisons store at Baron's Cross Road granted in August 2008. The theoretical floorspace capacity increases as overall available expenditure grows over time. The performance of Leominster is strongly influenced by Morrisons, which is located approximately one km to the west of the town centre.

3.40 Analysis of the other Zones indicates that Kington (Zone 2) and Ledbury (Zone 5) show the strongest positive capacity levels over the forecast period.

3.41 It is interesting to note that Kington has an expenditure surplus of some £1m at the base date of 2007; and that its current market share is only some 53% of total available expenditure. Furthermore the surveys suggest that the town is trading above benchmark levels (Table 14), principally due to the Co-Operative store. Theoretically, this indicates potential for more convenience floorspace in the town with available expenditure being lost to other centres.

3.42 Unlike Kington, Ledbury (Zone 5) retains a much higher proportion of available expenditure (79%). Whilst Ledbury shows very limited positive capacity at 2007, by 2016 there is potential for some 239-650 sq m (gross) convenience floorspace, which continues to increase over the forecast period.

3.43 The analysis of Bromyard (Zone 4) indicates no surplus expenditure up to 2026. The survey results suggest that existing retail facilities within this Zone are trading below benchmark levels. Our 'on the ground' inspections of the town also suggest that there may be a surfeit of floorspace in some parts of the town centre.

3.44 For Ross on Wye (Zone 6) retail capacity is influenced by the commitment for an additional foodstore at Brookend Street in the town centre and the Morrison's extension. At 2007, expenditure capacity is roughly in balance. Implementation of the commitment at Brookend Street and Morrisons extension absorbs the expenditure growth arising by 2016, so that no additional capacity emerges up to 2026.

3.45 It is relevant to note that this analysis assumes the existing market share of Ross on Wye (some 67%) will remain constant. The new foodstore will enhance the retail offer of Ross-on-Wye, which could in-turn increase the town centre's market share of expenditure from its catchment area, thus increasing convenience retail capacity within the town. We have also referred in Paper 2 to proposals for an extension to the Morrisons store in the town now under construction.

4 Comparison Goods Retail Capacity

4.1 This section provides an assessment of the economic scope to accommodate further comparison goods retail development within the key settlements of Hereford, Leominster, Ledbury, Ross-on-Wye, Kington and Bromyard.

Expenditure per capita estimates and forecasts

4.2 Comparison Table 2 sets out the comparison goods expenditure per capita by goods category specific to each Zone. Source data has been obtained from Experian with a base year of 2006 as for the convenience data. NSRT has been deducted according to the latest national Experian estimates (Experian Planner Briefing Note 7.1). The percentage reductions increase from 6.8% in 2006 to 9.1% in 2026.

4.3 Experian defines NSRT as purchases via mail order (including purchases from wholly internet-based companies), purchases from market stalls and purchases from door-to-door salesman. As noted in Section 3, they comment in Retail Planner Briefing Note 7.1 that since the non-store retailing figures include supermarkets that source internet goods sales from store sales floorspace areas, some internet sales do actually make demands on the floorspace of retail outlets, although this applies mostly to convenience goods.

4.4 Comparison goods retail expenditure per capita from 2006-2007 grew by +4.8% (Experian Retail Planner Briefing Note 6.1, paragraph 3.4.2). Our forecasts for the period 2007-2016 are based on the most recent estimates provided by Experian in their Retail Planner Briefing Note 7.1. These forecasts take into account the recent economic downturn and show minimal growth and some years of decline up to 2011, followed by trend growth of +2.5% to 2016 and +2.8% between 2017 and 2026.

4.5 Whilst Experian advocates a +2.8% per annum growth rate for the period 2017-2021, this rate would be lower than the long term rates achieved over a considerable period of time since the 1960s. We have therefore considered it prudent to allow for a slightly higher growth rate of +3.8%, which is still modest compared with the rates over the last 15 years. It should be noted that whilst this Study has used growth rates for this period higher than the latest Experian advice, these are still much lower than the rates used in the RTP Regional Centres Study Update May 2009. Based on long term evidence of recovery rates following previous recessions, RTP assumed that comparison goods growth in the period 2016-2021 would be strong and used a rate of +5.85%, followed by a rate of +4.25% for the period 2021-2026.

Available Comparison Expenditure

4.6 Estimates of available expenditure for comparison goods are set out in Table 4. Within the forecast period up to 2026, the spending power of the Study Area as a whole is steadily increasing. The table below details the total available comparison goods expenditure in the Study years of 2007, 2011, 2016, 2021 and 2026.

Table 4.1: Total Available Comparison Goods Expenditure (£m)

	2007	2011	2016	2021	2026
Comparison Goods Exp	£459.9m	£486.6m	£513.6m	£740.4m	£929.9m
Expenditure Growth		£27m	£107.3m	£253.8m	£437.3m
Cumulative Expenditure Growth		6%	22%	52%	90%

Expenditure Flows

4.7 The market shares of each centre within the Study Area and the resulting flows of comparison goods expenditure to these centres is shown in Comparison Tables 5 to 16.

4.8 Expenditure flows within the Study Area were calculated for all the principal stores/centres within each of the Study Area Zones. Expenditure flows from the Study Area to significant locations elsewhere, such as Cheltenham and Worcester, were also calculated.

4.9 As previously described, a Household Telephone Survey was undertaken by Research and Marketing during November 2007, which informed this analysis. The survey sought to identify the shopping destinations for the specific comparison goods product categories identified in the accompanying tables. With the exception of 'Clothing, Footwear and Fashion' goods the survey identified a single shopping destination.

4.10 In the case of 'Clothing, Footwear and Fashion' goods the survey identified both the first and second choice shopping destinations. We then applied a 70 / 30 weighting in allocating expenditure to the first choice and second choice locations. The total expenditure attracted to a shopping destination was calculated by summing the first and second choice expenditure for that centre.

4.11 The total comparison goods expenditure from the Study Area attracted to each centre/store was calculated by summing the expenditure attracted to the centre for each goods category. The Household Survey provided information on expenditure flows to a centre/store both from within its home Zone and from other Study Area Zones (inflow).

4.12 An allowance was also made for inflows of expenditure from outside the Study Area, to the centres/stores within the Study Area. Information on this was derived in part from the On-street Interview Surveys in Hereford City and the market towns, and in part was based on judgement.

4.13 The outputs of this analysis are shown at the base year 2007 in Table 17. Expenditure flows (market shares) are assumed to remain constant over the forecast period. The outputs for the other forecast years 2011-2026 are shown in Tables 18 to 21.

Turnover of Existing Stores/Centres

4.14 Comparison Table 22 shows the floorspace and estimated benchmark turnovers of the existing comparison goods floorspace within the Study Area.

4.15 The floorspace data for the existing stores within the Study Area has been obtained from Promap (2008), the IGD Foodstore Database (2007) and Herefordshire Council as appropriate. The net/gross floorspace ratios of the facilities are Drivers Jonas Deloitte estimates.

4.16 Verdict and Retail Rankings (2007) has been utilised to establish the sales density of named retailers, and establish comparison/convenience goods floorspace splits where appropriate. For Hereford City Centre and the market towns, an overall sales density has been applied based on Drivers Jonas Deloitte estimates.

4.17 Table 23 provides a summary of 'benchmark' turnover of the centres/stores derived from the average sales densities, and compares this with the 'actual' turnover of the centres/stores derived from the analysis of the survey responses. This table shows that Hereford City Centre is trading well, some £137.5m above benchmark levels. This is offset by an underperformance from facilities outside the City Centre that are trading below benchmark levels.

4.18 Within the remaining Study Area, with the exception of Ledbury (town centre), the market towns are all trading at a level below the benchmark position. In particular, Leominster and Ross-on-Wye are trading well below benchmark levels.

4.19 The market towns of Kington and Bromyard are also trading below benchmark levels, in both cases by £2-2.5m. Kington and Bromyard are the smallest of the five market towns in Herefordshire and thus have the lowest overall turnover levels. The difference between benchmark and survey derived trading positions within Kington and Bromyard is therefore more pronounced.

4.20 In some instances, retailers may naturally trade at levels below the benchmark levels that we have applied, but this does not necessarily indicate a retail weakness. It will be important to monitor the situation in the market towns.

Commitments

4.21 The estimated turnover of the retail commitments for comparison goods floorspace within the Study Area is shown in Table 24. This data has been provided by Herefordshire Council and updated in July 2010.

4.22 A substantial proportion of the expenditure allocated to commitments, is accounted for by retail commitments within Zone 1, the principal one of which is at the Holmer Road Retail Park accounting for some £11m. The bulky goods permission on the Trelleborg site in Ross on Wye, accounts for a further £3.6m.

4.23 As with convenience floorspace, this analysis includes (within Comparison Table 25) comparison floorspace that is expected to come forward as part of the anticipated Edgar Street Grid proposals. Based on information provided by Council officers, this assumes that by 2016, circa 17,500 sq m net comparison goods floorspace will be brought forward, with an assumed sales density of £5,000 per sq m, consistent with benchmark figures for Hereford City Centre (with a further 7,500 sq m net brought forward in Phase II by 2021). The figures also include the comparison goods element of the foodstore (15% of net floorspace), circa 367.5 sq m with a sales density of £7,500 per sq m.

Expenditure and Floorspace Capacity

4.24 Table 25 sets out the capacity position for Hereford and each of the market towns. The analysis is based upon the earlier assessment of:

- catchment populations;
- available expenditure;
- the market shares of available expenditure achieved by each settlement (retained expenditure); and
- and expenditure inflows.

This enables an estimate of the 'actual' turnovers of Hereford City and the five market towns to be made.

4.25 The market shares of expenditure achieved by Hereford City and the market towns from their catchment areas (shown in brackets) are given in the table below.

Table 4.2: Market Share for Hereford and the Market Towns at 2007

	Hereford (Study Area)	Kington (Zone 2)	Leominster (Zone 3)	Bromyard (Zone 4)	Ledbury (Zone 5)	Ross (Zone 6)
Market Share	75%	10%	41%	14%	44%	45%

Note: The market share retention rates are slightly higher than indicated in our ealrlier report due to correction of a spreadsheet formula error in the earlier report

4.26 The catchment area for comparison goods retailing within Hereford City comprises the whole Study Area. Within this area Hereford City retains a 75% market share at 2007. This is a high proportion of the comparison expenditure within its catchment, indicating the strength of comparison retail facilities within the City. The leakage of comparison goods expenditure to facilities outside the Study Area is shown in Tables 17 to 21, which indicate a leakage of expenditure to centres such as Worcester and Cheltenham.

4.27 For the market towns, the picture alters significantly. All the market towns have comparison goods market shares below 50%. Ledbury and Ross on Wye retain the highest proportion of their comparison expenditure. Conversely Kington and Bromyard retain the lowest proportions of comparison goods expenditure. These lower market shares indicate expenditure leakage to the stronger comparison retail facilities within the surrounding higher order centres, particularly Hereford City.

4.28 As noted above, the market shares of expenditure attracted to Hereford City and the market towns are held constant over the forecast period. We comment further on this below in relation to Hereford City.

4.29 In order to arrive at estimates of 'surplus' expenditure, the 'actual' turnover achieved at each centre has been compared with the 'benchmark' turnover estimates. All of this information is at 2007 and is derived from earlier tables.

4.30 As from 2011 the turnover assumed to be generated from commitments is also included (along with actual existing shop turnover) and compared with benchmark turnovers for the purposes of identifying 'surplus' expenditure.

4.31 Benchmark turnovers have been grown over the period 2006-2026 on a variable rate, which equates to half of the expenditure growth rate. This assumption allows for existing retailers to increase their productivity and sales densities during years of positive convenience expenditure growth.

4.32 The final part of Table 25 illustrates the surplus expenditure in terms of a floorspace equivalent. The analysis uses the average sales densities established in Table 22 to provide floorspace equivalents over the forecast period.

4.33 Table 4.3 shows the expenditure surplus and net and gross floorspace requirements for Hereford City at 2007 and the forecast dates.

Table 4.3: Expenditure Surplus and Floorspace Requirements for Hereford City

	2007	2011	2016	2021	2026
Expenditure Surplus	£117.6m	£125.4m	£54.1m	£89.4m	£192.8m
Floorspace Req (net sq m)	22,076	23,551	9,665	14,831	29,670
Floorspace Req (gross sq m)	29,434	31,401	12,873	19,775	39,560

4.34 Table 4.4 shows the gross floorspace requirements for the market towns at 2007 and the forecast dates.

Table 4.4: Gross Floorspace Requirements for the Market Towns

	2007	2026
Zone 2 – Kington	0	0
Zone 3 – Leominster	0	5,187
Zone 4 – Bromyard	0	0
Zone 5 – Ledbury	0	5,458
Zone 6 - Ross-on-Wye	0	4,440

Findings

4.35 These expenditure forecasts indicate substantial available comparison goods expenditure to support comparison goods retail floorspace growth in Hereford City at the base date, which will grow over the forecast period. In the short term the ability to support and deliver new floorspace will be affected by market considerations.

4.36 Forecasts for the market towns (based on them retaining a constant share of expenditure) indicate little theoretical potential for new floorspace. However, this should not inhibit them responding to market opportunities that may arise, particularly relating to any particular niche markets that they serve.

Hereford City

4.37 The analysis identifies significant capacity for further comparison goods retail development within Hereford City, driven by significant planned population growth within the County as well as growing expenditure per head on comparison goods. The Study Area that we have used for the assessment, broadly relating to the administrative County, is illustrative of the sub-regional role and function of Hereford City.

4.38 The forecasts relate to Hereford City as a whole. Unlike convenience goods shopping facilities, which have local catchments, and are therefore more widespread through the City, comparison goods shopping facilities are located predominantly in the City Centre. The major exception is bulky goods retail warehouse facilities located in retail parks such as at Holmer Road.

4.39 Planning policy seeks to steer new comparison goods retail facilities to town centre locations, and no longer makes a *prima facie* distinction between different types of retailing in terms of their location requirements. We have therefore made forecasts for the City as a whole. The location of new facilities (City Centre or elsewhere) will be a matter to be determined by planning policy and the exercise of development control.

4.40 We have noted above that 75% of Study Area comparison shopping expenditure is attracted to Hereford City.

4.41 Household interview surveys undertaken in 1994 indicated that at that time Hereford City attracted 64% of 'high street comparison shopping' from a much wider defined catchment area, which included Monmouth and Abergavenny in the south and Brecon and Builth Wells in the west. It is not possible to make a direct comparison between the findings of the two surveys, because of the significant difference in the catchment areas.

4.42 Our assessment indicates that there was some £117.6m of surplus available comparison goods expenditure at 2007 and £125.4m by 2011. However, after the implementation of the Edgar Street Grid proposals (circa 17,500 sq.m. net comparison floorspace by 2016 and a further 7,500 sq.m. by 2021) and commitments, this figure falls to £54.1m by 2016 before rising to £894m in 2021 and £192.8m by 2026.

4.43 The expenditure surplus translates into a floorspace equivalent of some 29,500 sq m. (gross) at 2007, rising slightly to circa 31,400 sq m. (gross) by 2011. As this assessment includes the Edgar Street proposals, the floorspace requirement drops to circa 12,900 sq.m. by 2016 before rising again to circa 19,800 sq.m. by 2021 and circa 39,600 sq.m. by 2026. It is clear therefore that there is ample theoretical expenditure capacity to support major new comparison goods floorspace in the City Centre.

4.44 It is however important to bear in mind the following in respect of the growth forecasts for Hereford City. The key factor determining the level of floorspace requirement is the assumed level of expenditure per head growth rate. In the period up to 2016, we have allowed for the effects of the current economic and market downturn. Post 2016, we have adopted an average annual expenditure per head growth rate of +3.8%, which is modest as compared with the growth rates experienced prior to the current economic downturn. Furthermore, the assessment makes no allowance for any increase in market shares of expenditure attracted to Hereford that the proposal could bring about; nor do we examine diversions of trade from any existing facilities.

4.45 Another factor that could affect the forecasts is use of the internet. We have made assumptions on internet usage for both comparison and convenience goods, based upon the latest Experian research, but this is an area of uncertainty that should also be monitored.

The Market Towns

4.46 The analysis for the individual market towns illustrates that these centres currently retain significantly lower levels of expenditure than Hereford City. With all the market towns, the market shares for comparison goods lie below 50%. Further analysis of these market shares reveals a significant flow of expenditure to Hereford as the County Town (see Tables 17-21). This pattern of retailing is not surprising for comparison goods, given the extensive range of comparison retail facilities within Hereford City compared to the market towns. It is also interesting to note the flow of expenditure to larger facilities outside the Study Area, including Worcester, Cheltenham, Gloucester and other locations.

4.47 The market shares of the market towns within Herefordshire have a direct relationship to the level of surplus available expenditure capacity within these centres. In particular the towns of Kington and Bromyard retain the lowest proportions of comparison goods expenditure with market shares of only 10% and 14% respectively. Whilst some of the expenditure loss may flow to retail facilities elsewhere within their Zones, this will be a small element of expenditure only. These market share levels therefore illustrate the heavy outflows of comparison goods expenditure principally to Hereford City and other centres such as Worcester (particularly from the Bromyard Zone).

4.48 The theoretical capacity for further comparison retailing in Kington and Bromyard is shown as being limited, with no theoretical capacity over the assessment period.

4.49 Within the other market towns, surplus available expenditure arises over the assessment period. For Leominster, Ledbury and Ross-on-Wye theoretical capacity arises by 2026 with scope to accommodate some 5,187 sq m (gross) in Leominster, 5,458 sq m (gross) floorspace in Ledbury and 4,440 sq m (gross) floorspace in Ross on Wye.

4.50 It is important to bear in mind that the forecasts of potential for new comparison goods floorspace in the market towns are low, because the assessments assume that the low retention rate of available expenditure and heavy expenditure outflows, to Hereford City in particular, will continue.

4.51 The market has brought about the current situation with limited comparison goods investment in these centres. However, it may well be a situation that planning policy would wish to change, if the opportunity arose. If, for example, new comparison goods retail investment were proposed in the centre of a market town, which would increase trade retention and market share, this would no doubt be welcomed by the Council. The capacity thresholds for the market towns shown in our assessments are more a representation of the current market circumstances in these towns, rather than capacity indicators to be built into planning policy.

5 Restaurants, Bars and Cafes

5.1 This section provides an assessment of the economic and commercial scope to accommodate further restaurant/cafés and public houses within the catchment area. This section also provide comment on the likely level of market demand, based on current market patterns.

Existing Provision

5.2 As part of our analysis of the health of Hereford and other centres within the catchment area (see Paper 2), we have commented on the levels of representation by restaurant/cafés and public houses. Hereford City Centre has the largest proportion of bars, restaurants and cafes. These facilities are included within the GOAD service classification for the centre. In 2007, Hereford service uses comprised 39% of the total number of units, some 6% above the national average. These facilities are particularly present around the Broad Street area of the City Centre, and also along Commercial Road.

5.3 From visual inspection, these facilities are operated by a mix of independent and national operators. Operators such as ASK, Pizza Express, Wetherspoons, and Pizza Hut aimed at a cross section of the market, complemented by independent operators such as Thai Gallery and Thai on Wye.

5.4 Within the other centres, there is also a mix of restaurant, bars and café uses. These are predominately operated by independents, such as Annies Bistro in Ross on Wye, the New Golden Dragon Restaurant in Leominster and Mrs Muffin's Tea Shop in Ledbury. Centres such as Ross on Wye and to an extent Ledbury serve as a destination for tourists. As a result, the provision of bars, restaurants and cafes in these centres is important to the continued success of the tourist economy.

Market Trends

5.5 Data on retailer requirements for the catchment area is available from Focus, a respected industry guide that covers the towns of Hereford, Ross-on-Wye, Ledbury and Leominster, though excludes Kington and Bromyard.

5.6 A search of the Focus website in July 2010 indicated that there were relatively few confirmed requirements from café, restaurant and public house operators in the catchment area. Within Hereford the number of requirements has dropped substantially, with only two requirements (Caffe Nero and Eat4Less) compared with 10 café/restaurant/public house requirements in November 2007. The only other live requirement at July 2010 was from Coffee No.1 in Ledbury.

5.7 Discussions with local agents has revealed significant differences between demand and occupation across the centres we have examined. Of primary concern to many agents is the lack of suitable premises in which new restaurant, bar and cafes can locate. In Hereford agents commented that whilst there was adequate demand for units, there are physical constraints with the existing stock such as irregular footplates that causes units to fall short of the operator requirements.

5.8 In addition to constraints with the unit footplates, the lack of rear loading access for instance means that many operators such as JD Wetherspoons have had to seek out premises away from their preferred location, towards the town centre fringes. Such concern was also voiced in Ross-on-Wye where a good level of market interest is hampered by a lack of larger units. This is also an identified concern in Leominster, indeed a recent letting to Wetherspoon is seen by agents as a sign of active demand that awaits suitable premises.

5.9 In Ledbury, one particular agent noted that there is a consistent demand for restaurants and cafes, and that when a suitable premise becomes available it is quickly re-let, even when the previous venture did not perform well economically.

5.10 The smaller centres of Bromyard and Kington have a much lower level of identified demand. Agents in Bromyard and Kington have stated they receive very few enquiries for restaurants and cafes. In Kington for instance an agent stated that one former restaurant had been on sale for two years, whilst others had remained vacant for between six months and one year.

5.11 A notable exception to this is demand to open fast food takeaways in both centres. Agents in Kington reveal that freeholders are reluctant to accommodate such facilities, whilst in Bromyard a concern about over-replication is identified by agents as a barrier to new premises opening.

Expenditure Forecasts

5.12 The importance of leisure spending for the UK as a whole is highlighted by Experian in their Briefing Note 5.1 published in November 2007. In paragraph 2.3 of their report Experian says:

"UK residents' spending is dominated by spending in restaurants, and cafes etc (including pubs). We estimate that this accounts for over sixty per cent of total leisure spend and nearly nine per cent of total spending by UK residents at home."

5.13 Experian estimates that the average expenditure per head of UK residents in restaurants/cafés and public houses in 2006 was £1,109 per annum.

5.14 We have obtained information on actual levels of spending on restaurants, cafés and pubs within the individual Zones from the Experian Local Area Expenditure Report 2007. This is set out in Table 2 in Appendix 4. The expenditure per capita on these services ranges from £986 in 2006 for Zone 2 - Kington to £1,024 for Zone 1A - Hereford City. These figures fall below the national average, in the case of Kington, some £120 below average per capita.

5.15 Experian Retail Planner Briefing Note 7.1 (August 2009) provides the most recent national forecasts of leisure spending as whole having regard to the recent economic downturn. Consumer spending on leisure services is generally more vulnerable than other sectors. Therefore in a time of slowing consumer growth there is likely to be some impact on the leisure sector. It is estimated that spending will contract during 2009 and 2010 (by -4.5% and -1.5% respectively), before growth resumes in 2011 by 0.7% per annum, increasing to 1.4% per annum in 2012. These growth rates are shown in full in the footnotes to Table 2 in Appendix 4.

5.16 A Study Area population of approximately 170,000 people generates total expenditure growth of £18.1m over the period 2006-2011; £37.2m over the period 2006-2016; and £84.3m over the period 2006-2026. This represents a substantial amount of potential additional spending in the later years.

5.17 It must be stressed, however, that this assessment is theoretical. In reality visits to restaurants in particular is optional and very much influenced by market considerations and the offer available. There is, for example, a substantial market difference between fast food restaurant/takeaways and quality dining, both in terms of clientele and the distance that customers are prepared to travel.

5.18 Both the absolute figure of spending in restaurants/cafés and public houses, and its growth potential indicate its importance to the national and local economies. In the case of centres such as Ross-on-Wye its importance is compounded by visitor spending.

Findings

5.19 There is little doubt that there is theoretical expenditure capacity to support additional restaurant/café uses within Hereford City Centre and the five market towns.

5.20 Spending on leisure uses and particularly restaurant, bars etc is sensitive to economic changes. In times of individual spending restraint, visiting restaurant and bars is the key area that is contracted, often above spending on retail goods.

5.21 It is also important to remember that restaurant/café uses are not usually destinations in their own right. The ability to attract new restaurant/café facilities to existing centres will therefore depend upon perceptions of the centre as a whole and its offer, as perceived by residents, visitors, and investors.

6 Leisure and Cultural Uses

6.1 This section provides an assessment of the current market for and scope to introduce further leisure and cultural facilities within the catchment area. This section also provide comment on the likely level of market demand, based on current market patterns.

Existing Provision

Cinemas/Theatre

6.2 Within Hereford City Centre there is a marked concentration of leisure uses along Commercial Road towards Brook Retail Park. The street is occupied by a variety of public houses, takeaways and leisure uses. Located on this street is Hereford's Odeon cinema, the smallest cinema in the Odeon chain with 1 screen incorporating 330 seats. This is complemented by the Courtyard arts centre on Edgar Street, which includes an auditorium able to screen recent releases. The Courtyard centre also provides craft workshops, exhibition and plays/local productions. Within Hereford, close to the train station is a facility called TGS Bowling. This provides ten pin bowling, pool and licensed bar/restaurant facilities all under one roof. It is interesting to note that the three main leisure destinations identified above all lie outside the defined CSCA boundary.

6.3 Elsewhere in the county, there is a mix of leisure facilities. 'Flicks in the Sticks' is operated by a charitable trust Arts Alive. This provides a touring film service showing recent releases in venues such as the Conquest theatre Bromyard, St Mary's Church Hall, Ross-on-Wye, and Brilley Village Hall, Kington. In addition, facilities such as the Market Theatre (Market Street, Ledbury) provide a dedicated venue for film screenings and the performing arts. Overall, there is good provision of cinema/theatre facilities within the various centres in the catchment area.

Swimming, Gyms, Sports

6.4 Halo Leisure is a community based 'not for profit' social enterprise which manages sports facilities across Herefordshire including: Hereford Leisure Centre and Hereford Leisure Pool; Ledbury Leisure Centre and Swimming Pool; Leominster Leisure Centre; Ross Sports Centre and Swimming Pool; and The Bromyard Centre. These facilities provide the local community with access to a range of affordable services from spa facilities in Hereford City Centre through to Step Aerobics at the Bromyard Centre, and golf in Hereford.

6.5 In addition to the facilities provided by Halo Leisure, commercial operators provide gyms and leisure facilities elsewhere in Herefordshire. Examples of these include Holmer Park and Wye Leisure that provide fitness and leisure facilities towards the expensive end of the market and facilities such as Sixth Sense, Blue Lizard and Archways that are privately operated gyms.

Market Trends

6.6 A search of the Focus website in July 2010 identified no national fitness operators with requirements for a leisure facility in Hereford. However, the Planning Inspectorate recently dismissed an appeal for a leisure facility at Holmer Road which was likely to be operated by JJB Sports. The latter suggests that there may still be some demand from national leisure operators in Hereford.

6.7 In relation to further cinema/theatre facilities, we note that the development plan designates a new cinema facility on the site of the cattle market within the defined CSCA boundary of Hereford.

6.8 Discussions with local agents has revealed that there have been few enquiries regarding leisure facilities within the centres with overall demand perceived as low. As with restaurants, cafes and bars, a lack of appropriate premises and sites is seen by agents as a major factor accounting for low demand.

6.9 A particular agent in Leominster noted that there had been two or three attempts to bring new leisure facilities to the town within the last few years, albeit in out-of-centre locations.

6.10 In the smaller centres of Kington and Bromyard, local agents have stated there is very little demand for leisure units.

Findings

6.11 Herefordshire is a geographically extensive catchment with various settlements located some distance apart. Accessibility to services is therefore an important consideration within Herefordshire.

6.12 Existing cinema and theatre facilities *prima facie* appear to provide a good service to local communities within Herefordshire. The 'Flicks in the Sticks' travelling facility provides a good service to those located in centres some distance from the main cinema facilities in Hereford. We note however, that the provision of cinema facilities in Hereford City is somewhat limited. The principal facility is the Odeon cinema which is the smallest cinema in the Odeon chain and this is complemented by the Courtyard facility which serves other performances. We therefore *prima facie* consider there is scope to accommodate additional screens in a modern cinema environment.

6.13 Provision of sport and leisure facilities also appears good in the more rural parts of the County. The facilities operated by Halo Leisure provide a good range of services in the market towns and outside. Across the County, Halo Leisure also operate a diverse range of facilities including spa, golf and exercise classes.

6.14 Within Hereford City Centre, there is limited provision of fitness and sports facilities with Archways Leisure and Blue Lizard Fitness identified from our analysis, though the larger sized facilities are located beyond the town centre. From our analysis we therefore conclude that there may be scope to accommodate further fitness and sports facilities in the City Centre.

6.15 It is notable that the good level of provision in more rural areas of the county is operated by charitable trusts and non-profit organisations. This reflects our discussions with local agents which found that the market for further leisure facilities in the market towns, particularly Bromyard and Kington is somewhat limited.

7 Offices

7.1 This section provides an assessment of the current market for and scope to introduce further office development within the catchment area. It also provides comment on the current level of market demand, based on discussions with agents and our initial analysis of market patterns in November 2007. Our findings in 2007 (see below) were that there was a stable but limited market for office space in Herefordshire, even in Hereford City. Within the market towns the market was even more limited. The continuing economic difficulties since 2007 will not have changed this overall picture and we have not therefore had further discussions with local agents.

Existing Provision

7.2 Discussions with the Council have indicated that there have been no major exclusively office developments in the main centres of Herefordshire since the circa 1960s. A review of the market for available office space in Hereford City Centre has identified a number of units in locations such as Bridge Street and Broad Street. These units are predominantly arranged over the upper floors and extend to between 70 sq m and 255 sq m In other market towns in the County, the pattern is similar with office accommodation in the town centres generally available over existing retail premises. For example, in Ledbury 3 High Street is currently available to the market (at November 2007) comprising 21 sq m located on the first floor.

7.3 Beyond the main centres, there has been some large scale developments centres that incorporate office units. We provide below a brief commentary on these key developments.

Leominster Enterprise Park

7.4 Leominster Enterprise Park is a major employment location within northern Herefordshire and is built on land acquired and serviced by Advantage West Midlands. The site is being developed for uses within planning Classes B1 (Business), B2 (General Industrial) and B8 (Wholesale, Warehousing & Distribution).

7.5 The scheme involved constructing a new access road from the A49 trunk road into the estate to deliver approximately 12 hectares of land allocated for employment use. Current developments on the site include the Leominster Business Plaza a new, self-contained office development of single and two storey accommodation in a range of sizes from 135 sq m to 372 sq m with larger accommodation available on a bespoke basis.

Leominster Business Plaza

7.6 Within this development six units are currently available freehold each comprising 135 sq m Construction has not commenced on these units and we understand this is unlikely before purchasers are identified for the various units.

Moreton Business Park - (north of Hereford)

7.7 This development totals approximately 23 hectares of land which is being developed over a series of phases. Most recent to the market is a new development of five industrial and warehouse buildings, referred to as 'The Glide', this is situated on the business park adjacent to the A49 and with the benefit of a possible direct rail link. The five units range from 404 sq m to 780 sq m.

Market Trends

7.8 Across the centres, discussions with local agents has revealed that the office market is stable, but is not performing particularly well and that demand for office space is low.

7.9 In Hereford, agents have noted that there is a good level of demand for small floorplates and that these can be let, albeit at a low rental value, in a relatively short time period. Much of the office stock in Hereford is seen as poor, largely contained above shops and in older floorplates. Whilst there are one or two examples of good levels of take-up being reached, in general agents have suggested that large scale office schemes present a risk to developers. It is interesting to note that agents have stated that they believe a major change such as the Edgar Street Grid scheme could kick start the office market within the City.

7.10 In Ross-on-Wye, the town centre office market was notably described by agents as 'not good' and 'weak'. Agents note that the demand that exists is increasingly turning towards out-of-centre business parks where high quality office and good parking provision can be obtained at relatively low rates. Such a trend was also noted in Leominster with poor accessibility cited as a major constraint to town centre locations, alongside unsuitable town centre floorplates.

7.11 Likewise Ledbury is also seen as particularly limited in its office market. The recent Sear House development on Bye Street was mentioned as an anomaly with agents suggesting that in general demand does not exist for speculative office growth.

7.12 Bromyard and Kington are seen to have a poor level of demand for offices. In particular an agent in Bromyard stated that despite Bromyard's good location on the road network, any potential demand is stifled by lack of parking in the town.

Findings

7.13 Our initial analysis indicates that there have been no major exclusively office developments in the main centres of Herefordshire since the circa 1960s. Existing facilities in the main centres are predominantly limited to facilities over existing ground floor commercial space, often with limited scale floorplates.

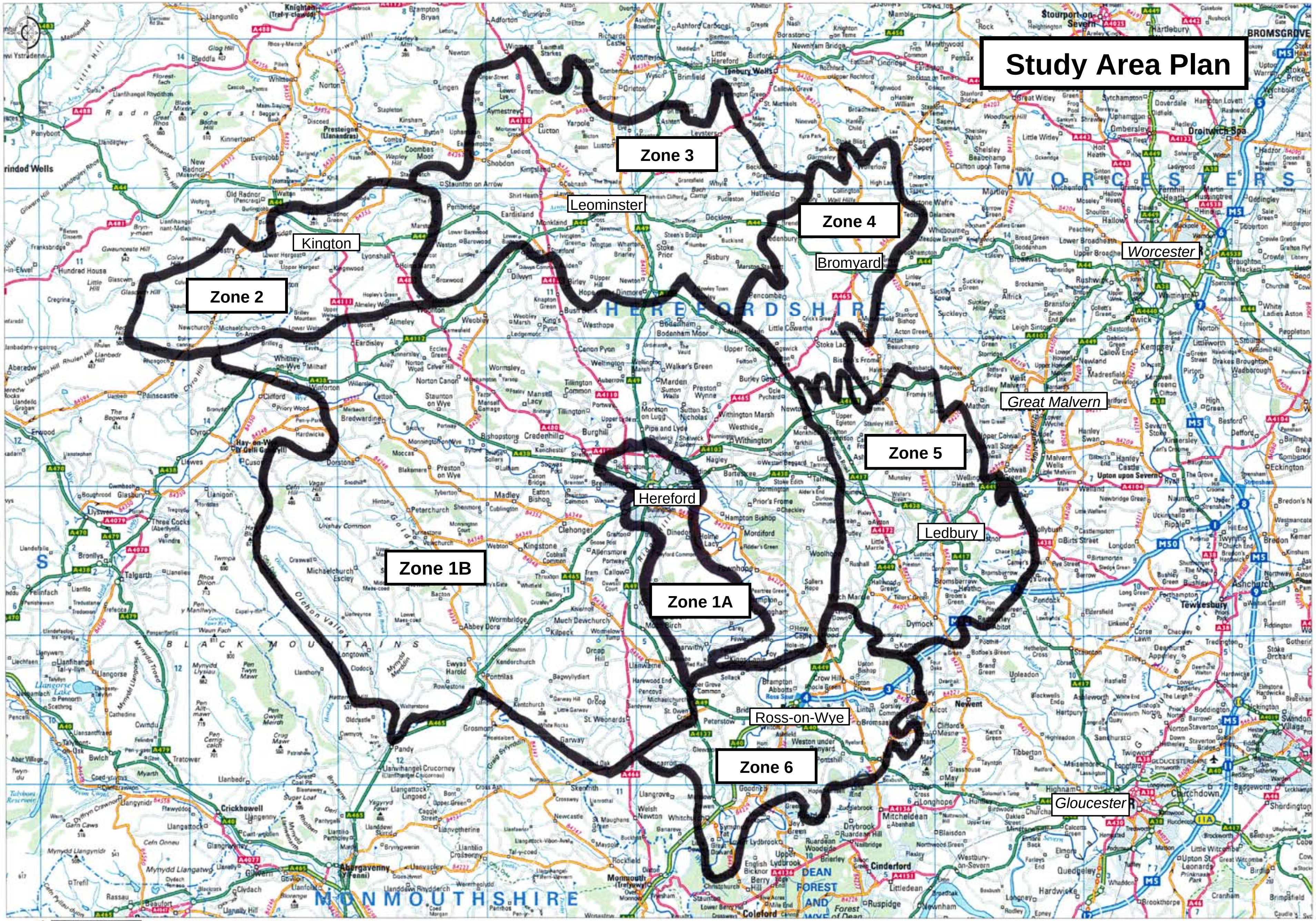
7.14 Beyond the main centres, there has however have been some large scale developments outside these centres that incorporate office units. These facilities cater for larger scale requirements, therefore providing a complementary market to the main centres.

7.15 From initial discussions with agents, we have identified a stable but limited market for office space in Herefordshire. Within the main centres the market activity and confidence varies. Hereford City Centre has the strongest office market of all the centres, though even here the quality of existing stock is limited. The market towns within Herefordshire have limited market for offices and take-up of lettings is slower than in Hereford. Market towns such as Ross-on-Wye, Bromyard and Kington are identified by local agents as having particularly limited markets.

7.16 In terms of further requirements for office space, Hereford City Centre is suggested as having the strongest market for office uses. If further new development is pursued that delivers good quality accommodation in a range of floorplates, this may generate a good level of demand. Within the other centres, *prima facie*, we consider there to be limited scope for further office development.

Appendix 1

Study Area Plan



Drivers Jonas Deloitte.

Appendix 2

Convenience Goods Economic Analysis

Herefordshire Council

This spreadsheet has been prepared for Herefordshire Council as part of the Herefordshire PPS4 Assessment 2010.

Job title:
Herefordshire PPS4 Assessment 2010
Appendix 2: Convenience Analysis

Client:
Herefordshire Council

Drivers Jonas Deloitte ref file:
#17911867v2

Date:
September 2010

Herefordshire PPS4 Assessment
Convenience Analysis

Table Convenience 1: Population Estimates and Projections

Study Area Zones	2006	2007	2011	2016	2021	2026
Zone 1A - Hereford City	59,491	60,086	62,466	65,441	68,416	71,391
Zone 1B - Hereford Rural	41,076	41,221	41,803	42,530	43,257	43,983
Zone 2 - Kington	4,809	4,835	4,937	5,064	5,192	5,319
Zone 3 - Leominster	20,239	20,469	21,387	22,536	23,684	24,833
Zone 4 - Bromyard	7,070	7,120	7,321	7,573	7,824	8,075
Zone 5 - Ledbury	15,370	15,466	15,848	16,326	16,804	17,282
Zone 6 - Ross-on-Wye	20,774	20,900	21,402	22,030	22,658	23,286
Total	**168,829**	**170,096**	**175,164**	**181,499**	**187,834**	**194,169**

Source/Notes
(1) Study Area defined as shown in Appendix 1.

(2) Population figures for 2006 taken from Experian Demographic Report (January 2008).

(3) Population growth based on Housing Distribution identified in Herefordshire Core Strategy Place Shaping Document (as per RSS Phase II Preferred Strategy). For the towns this equates to growth over the plan period of 8,500 dwellings in Hereford, 2,500 dwellings in Leominster, 1,000 dwellings in Ledbury, 1,000 dwellings in Ross on Wye, 500 dwellings in Bromyard and 200 dwellings in Kington. Growth in rural areas is based on RSC/Hub allocations identified by Herefordshire Council in June 2010. The remainder of unallocated rural growth (2,600 dwellings) has been apportioned to Zones 1B-6 based on 2006 proportions of population. All additional dwellings are translated into population figures using the household density ratios and population projections produced by Herefordshire Council (June 2010).

(4) Study area population forecasts differ from county estimates due to catchment boundary differences and Experian base data (see supporting report)

Herefordshire PPS4 Assessment
Convenience Analysis

Table Convenience 2: Convenience Expenditure Per Head (EPH)

	2006	2007	2011	2016	2021	2026
Zone 1A - Hereford City	£ 1,529	£ 1,552	£ 1,543	£ 1,591	£ 1,658	£ 1,729
Zone 1B - Hereford Rural	£ 1,634	£ 1,658	£ 1,649	£ 1,699	£ 1,772	£ 1,847
Zone 2 - Kington	£ 1,594	£ 1,618	£ 1,609	£ 1,658	£ 1,729	£ 1,802
Zone 3 - Leominster	£ 1,594	£ 1,617	£ 1,608	£ 1,658	£ 1,729	£ 1,802
Zone 4 - Bromyard	£ 1,600	£ 1,623	£ 1,614	£ 1,664	£ 1,735	£ 1,809
Zone 5 - Ledbury	£ 1,635	£ 1,659	£ 1,650	£ 1,700	£ 1,773	£ 1,848
Zone 6 - Ross-on-Wye	£ 1,638	£ 1,662	£ 1,652	£ 1,703	£ 1,776	£ 1,851

Sources/Notes:
(1) 2006 base EPH from Experian E-Marketer (January 2008).
(2) Expenditure per Head projected forward utilising Experian Retail Planner Briefing Note 7.1 (August 2009), Figure 1 - 2007: 2.1% - (Experian 6.1, October 2008), 2008: 0.9%, 2009: -0.5%, 2010: -0.2%, 2011: 0.6%, 2012-16: 0.8%, 2017-26: 0.9%.
(3) Non-Store Retail Trade Adjustment Taken from Experian Retail Planner Briefing Note 7.1 (August 2009) Appendix 3
(4) 2006 Prices.

Herefordshire PPS4 Assessment
Convenience Analysis

Table Convenience 3: Total Available Convenience Expenditure (£m)

	2006	2007	2011	2016	2021	2026
Zone 1A - Hereford City	£ 91.0	£ 93.2	£ 96.4	£ 104.1	£ 113.5	£ 123.4
Zone 1B - Hereford Rural	£ 67.1	£ 68.3	£ 68.9	£ 72.3	£ 76.6	£ 81.2
Zone 2 - Kington	£ 7.7	£ 7.8	£ 7.9	£ 8.4	£ 9.0	£ 9.6
Zone 3 - Leominster	£ 32.3	£ 33.1	£ 34.4	£ 37.4	£ 40.9	£ 44.7
Zone 4 - Bromyard	£ 11.3	£ 11.6	£ 11.8	£ 12.6	£ 13.6	£ 14.6
Zone 5 - Ledbury	£ 25.1	£ 25.7	£ 26.1	£ 27.8	£ 29.8	£ 31.9
Zone 6 - Ross-on-Wye	£ 34.0	£ 34.7	£ 35.4	£ 37.5	£ 40.2	£ 43.1
Total Study Area	**£ 268.5**	**£ 274.5**	**£ 281.0**	**£ 300.0**	**£ 323.6**	**£ 348.6**
			2007-2011	**2007-2016**	**2007-2021**	**2007-2026**
Cumulative Expenditure Growth (£m)			£6.5	£25.6	£49.2	£74.2
Cumulative Expenditure Growth (%)			2%	9%	18%	27%

Source/Notes
(1) Figures calculated by multiplying Table 1 by Table 2.
(2) 2006 prices.

Herefordshire PPS4 Assessment
Convenience Analysis

Table Convenience 4: Market Shares for Convenience Goods Spending in 2007 (First Choice)

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL
Zone 1A - Hereford City								
Hereford Centre								
Sainsburys, Barton Yard	18.9%	24.4%	2.5%	3.3%	3.2%	0.7%	1.1%	13.5%
Morrisons, Commercial Road	20.0%	12.0%	0.0%	1.1%	6.3%	0.7%	0.5%	10.1%
Tesco Metro, Bewell Street	16.1%	9.9%	0.0%	0.5%	1.6%	0.0%	0.0%	7.9%
Marks & Spencer (Food Hall), High Town	2.2%	0.7%	2.5%	0.0%	0.0%	0.0%	1.1%	1.1%
Aldi, Eign Street	0.2%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Butter Market, High Town	0.2%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Outside Hereford Centre								
Tesco, Abbotsmead Road	25.1%	21.9%	0.0%	1.6%	11.1%	0.7%	2.8%	14.9%
ASDA, Belmont Road	9.2%	3.5%	4.9%	1.1%	4.8%	0.7%	1.6%	4.5%
Tesco Express, Tupsley	1.3%	0.7%	0.0%	0.0%	0.0%	4.4%	0.0%	1.0%
Lidl, Brook Retail Park	1.7%	0.5%	0.0%	0.5%	1.6%	0.7%	0.0%	0.9%
Co-op, Grandstand Road	1.3%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Co-op, Whitecross Road	1.1%	0.5%	0.0%	0.0%	1.6%	0.0%	0.0%	0.5%
Co-op, College Road	0.2%	0.2%	2.5%	0.0%	1.6%	0.0%	0.0%	0.3%
Welcome, Holme Lacy Road	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Local Stores, Hereford	0.2%	1.2%	0.0%	0.5%	0.0%	0.7%	0.0%	0.5%
Zone 1B - Hereford Rural								
Elsewhere								
Local Stores, Ewyas Harold	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Local Stores, Marden	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Local Stores, Peterchurch	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Local Stores, Longtown	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Zone 2 - Kington								
Kington Centre								
Co-op, Crabtree Road, Kington	0.0%	2.5%	46.3%	2.2%	0.0%	0.0%	0.0%	2.2%
Local Stores, Kington	0.0%	0.2%	14.3%	0.0%	0.0%	0.0%	0.0%	0.5%
Zone 3 - Leominster								
Leominster Centre								
Aldi, Dishley Road, Leominster	0.0%	0.0%	0.0%	3.3%	1.6%	0.0%	0.0%	0.5%
Somerfield, Dishley Road, Leominster	0.0%	0.2%	0.0%	16.0%	0.0%	0.0%	0.0%	2.0%
Local Stores, Leominster	0.0%	0.0%	0.0%	6.1%	0.0%	0.0%	0.0%	0.7%
Outside Leominster Centre								
Morrisons, Leominster	0.6%	5.4%	24.4%	60.3%	7.9%	0.0%	0.5%	10.1%
Zone 4 - Bromyard								
Bromyard Centre								
Co-op, Tenbury Road, Bromyard	0.0%	0.0%	0.0%	0.0%	44.4%	0.0%	0.5%	1.9%
Local Stores, Bromyard	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	0.2%
Zone 5 - Ledbury								
Ledbury Centre								
Somerfield, Ledbury	0.0%	0.0%	0.0%	0.0%	0.0%	27.0%	0.0%	2.5%
Local Stores, Ledbury	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%	0.0%	0.3%
Outside Ledbury Centre								
Tesco, Orchard Lane, Ledbury	0.6%	1.4%	0.0%	0.0%	3.2%	53.2%	1.6%	5.7%
Zone 6 - Ross-on-Wye								
Ross-on-Wye Centre								
Morrisons, Ross-on-Wye	0.2%	2.8%	0.0%	0.0%	0.0%	0.0%	52.4%	7.1%
Somerfield, The Maltings, Ross-on-Wye	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	16.1%	2.1%
Spar, High Street, Ross-on-Wye	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.1%
Co-op, Broad Street, Ross-on-Wye	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Local Stores, Ross-on-Wye	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	2.2%	0.4%
Elsewhere								
Londis, Wormelow	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Non Zone								
Waitrose, Monmouth	0.4%	1.9%	0.0%	0.0%	0.0%	0.0%	11.1%	2.0%
Waitrose, Great Malvern	0.0%	0.0%	0.0%	0.0%	3.2%	4.4%	0.5%	0.6%
Tesco, Gloucester	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	2.8%	0.5%
Other	0.0%	4.9%	2.5%	3.2%	3.2%	2.1%	4.7%	3.1%

Source/Notes
(1) Market share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Expenditure Per Head on first choice and second choice shopping location assumed to be on a 70:30 split.
(3) Figures have been adjusted to remove 'internet' responses as NSRT has previously been discounted.
(4) For Local Stores (other than in Hereford), we have treated them as being within the town centre.

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Convenience Analysis

Table Convenience 5: Turnover of Facilities by Market Shares for Convenience Goods Spending in 2007 (First Choice)

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL
Population 2007	60,086	41,221	4,835	20,469	7,120	15,466	20,900	**170,096**
Total Available Convenience Expenditure in 2007 (£m)	£ 93.2	£ 68.3	£ 7.8	£ 33.1	£ 11.6	£ 25.7	£ 34.7	£ 274.5
Total Available Convenience Expenditure in 2007(£m) (First Choice)	£ 65.3	£ 47.8	£ 5.5	£ 23.2	£ 8.1	£ 18.0	£ 24.3	£ 192.1
Zone 1A - Hereford City								
Hereford Centre								
Sainsburys, Barton Yard	£ 12.4	£ 11.7	£ 0.1	£ 0.8	£ 0.3	£ 0.1	£ 0.3	£ 26.0
Morrisons, Commercial Road	£ 13.1	£ 5.7	£ -	£ 0.3	£ 0.5	£ 0.1	£ 0.1	£ 19.4
Tesco Metro, Bewell Street	£ 10.5	£ 4.7	£ -	£ 0.1	£ 0.1	£ -	£ -	£ 15.2
Marks & Spencer (Food Hall), High Town	£ 1.4	£ 0.3	£ 0.1	£ -	£ -	£ -	£ 0.3	£ 2.1
Aldi, Eign Street	£ 0.1	£ 0.6	£ -	£ -	£ -	£ -	£ -	£ 0.8
Butter Market, High Town	£ 0.1	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.4
Outside Hereford Centre								
Tesco, Abbotsmead Road	£ 16.4	£ 10.5	£ -	£ 0.4	£ 0.9	£ 0.1	£ 0.7	£ 28.7
ASDA, Belmont Road	£ 6.0	£ 1.7	£ 0.3	£ 0.3	£ 0.4	£ 0.1	£ 0.4	£ 8.7
Tesco Express, Tupsley	£ 0.9	£ 0.3	£ -	£ -	£ -	£ 0.8	£ -	£ 1.9
Lidl, Brook Retail Park	£ 1.1	£ 0.2	£ -	£ 0.1	£ 0.1	£ 0.1	£ -	£ 1.7
Co-op, Grandstand Road	£ 0.9	£ 0.4	£ -	£ -	£ -	£ -	£ -	£ 1.3
Co-op, Whitecross Road	£ 0.7	£ 0.2	£ -	£ -	£ 0.1	£ -	£ -	£ 1.0
Co-op, College Road	£ 0.1	£ 0.1	£ 0.1	£ -	£ 0.1	£ -	£ -	£ 0.6
Welcome, Holme Lacy Road	£ -	£ 0.2	£ -	£ -	£ -	£ -	£ -	£ 0.2
Local Stores, Hereford	£ 0.1	£ 0.6	£ -	£ 0.1	£ -	£ 0.1	£ -	£ 1.0
Zone 1B - Hereford Rural								
Elsewhere								
Local Stores, Ewyas Harold	£ -	£ 0.3	£ -	£ -	£ -	£ -	£ -	£ 0.4
Local Stores, Marden	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.2
Local Stores, Peterchurch	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.2
Local Stores, Longtown	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.2
Zone 2 - Kington								
Kington Centre								
Co-op, Crabtree Road, Kington	£ -	£ 1.2	£ 2.5	£ 0.5	£ -	£ -	£ -	£ 4.2
Local Stores, Kington	£ -	£ 0.1	£ 0.8	£ -	£ -	£ -	£ -	£ 1.0
Zone 3 - Leominster								
Leominster Centre								
Aldi, Dishley Road, Leominster	£ -	£ -	£ -	£ 0.8	£ 0.1	£ -	£ -	£ 1.0
Somerfield, Dishley Road, Leominster	£ -	£ 0.1	£ -	£ 3.7	£ -	£ -	£ -	£ 3.9
Local Stores, Leominster	£ -	£ -	£ -	£ 1.4	£ -	£ -	£ -	£ 1.3
Outside Leominster Centre								
Morrisons, Leominster	£ 0.4	£ 2.6	£ 1.3	£ 14.0	£ 0.6	£ -	£ 0.1	£ 19.4
Zone 4 - Bromyard								
Bromyard Centre								
Co-op, Tenbury Road, Bromyard	£ -	£ -	£ -	£ -	£ 3.6	£ -	£ 0.1	£ 3.7
Local Stores, Bromyard	£ -	£ -	£ -	£ -	£ 0.4	£ -	£ -	£ 0.4
Zone 5 - Ledbury								
Ledbury Centre								
Somerfield, Ledbury	£ -	£ -	£ -	£ -	£ -	£ 4.8	£ -	£ 4.8
Local Stores, Ledbury	£ -	£ -	£ -	£ -	£ -	£ 0.5	£ -	£ 0.6
Outside Ledbury Centre	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
Tesco, Orchard Lane, Ledbury	£ 0.4	£ 0.7	£ -	£ -	£ 0.3	£ 9.6	£ 0.4	£ 11.0
Zone 6 - Ross-on-Wye								
Ross-on-Wye Centre								
Morrisons, Ross-on-Wye	£ 0.1	£ 1.3	£ -	£ -	£ -	£ -	£ 12.7	£ 13.7
Somerfield, The Maltings, Ross-on-Wye	£ 0.3	£ -	£ -	£ -	£ -	£ -	£ 3.9	£ 4.0
Spar, High Street, Ross-on-Wye	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ 0.2
Co-op, Broad Street, Ross-on-Wye	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.2
Local Stores, Ross-on-Wye	£ -	£ 0.2	£ -	£ -	£ -	£ -	£ 0.5	£ 0.8
Elsewhere								
Londis, Wormelow	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.2
Non Zone								
Waitrose, Monmouth	£ 0.3	£ 0.9	£ -	£ -	£ -	£ -	£ 2.7	£ 3.9
Waitrose, Great Malvern	£ -	£ -	£ -	£ -	£ 0.3	£ 0.8	£ 0.1	£ 1.2
Tesco, Gloucester	£ -	£ -	£ -	£ -	£ -	£ 0.3	£ 0.7	£ 1.0
Other	£ -	£ 2.4	£ 0.1	£ 0.7	£ 0.3	£ 0.4	£ 1.1	£ 6.0

Source/Notes
(1) Market share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Expenditure Per Head on first choice and second choice shopping location assumed to be on a 70:30 split.

Herefordshire PPS4 Assessment
Convenience Analysis

Table Convenience 6: Market Shares for Convenience Goods Spending in 2007 (Second Choice)

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL
Zone 1A - Hereford City								
Hereford Centre								
Sainsburys, Barton Yard	17.2%	15.0%	14.2%	5.4%	10.2%	1.8%	2.9%	11.7%
Morrisons, Commercial Road	14.5%	7.4%	3.6%	0.7%	15.3%	2.8%	0.7%	7.8%
Tesco Metro, Bewell Street	11.3%	7.4%	3.6%	0.7%	2.6%	0.0%	0.0%	5.9%
Marks & Spencer, High Town	13.6%	7.9%	0.0%	2.3%	0.0%	3.7%	3.6%	7.7%
Aldi, Eign Street	3.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%
Butter Market, High Town	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Iceland, Eign Gate	1.7%	1.0%	3.6%	0.0%	0.0%	0.0%	0.0%	1.0%
Outside Hereford Centre								
Tesco Abbotsmead Road	10.5%	11.2%	3.6%	3.8%	5.2%	0.9%	2.9%	7.7%
ASDA, Belmont Road	14.0%	8.3%	10.6%	5.4%	2.6%	2.8%	3.6%	8.5%
Tesco Express, Tupsley	2.0%	1.0%	0.0%	0.7%	2.6%	0.0%	0.7%	1.2%
Lidl, Brook Retail Park	1.7%	3.6%	3.6%	0.0%	10.2%	0.0%	0.7%	2.1%
Co-op, Grandstand Road	2.0%	2.9%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%
Co-op, Whitecross Road	2.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
Co-op, College Road	1.1%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Welcome, Holme Lacy Road	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
One Stop, Belmont Road	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.1%
Farm Shop, Oakchurch	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Farmfoods, Belmont Road	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.4%
Local Stores, Hereford	2.3%	4.5%	3.6%	1.6%	0.0%	0.0%	0.0%	2.2%
Zone 1B - Hereford Rural								
Elsewhere								
Canon Pyon Store, Canon Pyon	0.0%	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.1%
Local Stores, Ewyas Harold	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Locks Garage, Allensmore	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Local Stores, Burghill	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Local Stores, Weobley	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Londis, Brampton Road, Madley	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Zone 2 - Kington								
Kington Centre								
Grapevine, Kington	0.0%	0.0%	3.6%	0.7%	0.0%	0.0%	0.0%	0.1%
Nisa, High Street, Kington	0.0%	0.0%	7.2%	0.0%	0.0%	0.0%	0.0%	0.1%
Co-op, Crabtree Road, Kington	0.0%	0.7%	17.8%	1.6%	0.0%	0.0%	0.0%	0.8%
Ashby's, Kington	0.0%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.1%
Local Stores, Kington	0.0%	0.7%	3.6%	0.7%	0.0%	0.0%	0.0%	0.4%
Zone 3 - Leominster								
Leominster Centre								
Aldi, Dishley Road, Leominster	0.3%	0.3%	3.6%	10.9%	2.6%	0.0%	0.0%	1.6%
Somerfield, Dishley Road, Leominster	0.3%	0.7%	0.0%	31.7%	0.0%	0.0%	0.0%	4.0%
Local Stores, Leominster	0.3%	1.0%	0.0%	7.8%	0.0%	0.0%	0.0%	0.4%
Outside Leominster Centre								
Morrisons, Leominster	0.0%	6.0%	10.6%	19.4%	2.6%	0.0%	0.0%	4.4%
Zone 4 - Bromyard								
Bromyard Centre								
Welcome (Co-op), Bromyard	0.0%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	0.1%
Co-op, Tenbury Road, Bromyard	0.0%	0.3%	0.0%	0.0%	17.9%	0.0%	0.0%	0.7%
Local Stores, Bromyard	0.0%	0.0%	0.0%	0.0%	7.7%	0.0%	0.0%	0.3%
Zone 5 - Ledbury								
Ledbury Centre								
Somerfield, Ledbury	0.0%	0.3%	0.0%	0.0%	2.6%	34.9%	0.0%	3.7%
Local Stores, Ledbury	0.0%	0.3%	0.0%	0.0%	0.0%	12.0%	0.0%	0.4%
Outside Ledbury Centre								
Tesco, Orchard Lane, Ledbury	0.0%	1.2%	0.0%	0.7%	5.2%	21.1%	0.7%	2.9%
Elsewhere								
Little Verzons Fruit Farm	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.0%	0.1%
Zone 6 - Ross-on-Wye								
Ross-on-Wye Centre								
Morrisons, Ross-on-Wye	0.5%	2.2%	0.0%	0.0%	0.0%	2.8%	22.6%	4.0%
Somerfield, The Maltings, Ross-on-Wye	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	30.7%	4.0%
Spar, High Street, Ross-on-Wye	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.1%
Co-op, Broad Street, Ross-on-Wye	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Local Stores, Ross-on-Wye	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%	0.5%
Non Zone								
Waitrose, Monmouth	0.3%	2.6%	0.0%	0.0%	0.0%	0.0%	7.4%	1.8%
Waitrose, Malvern	0.0%	0.7%	0.0%	0.7%	2.6%	6.4%	0.0%	1.0%
Waitrose, Abergavenny	0.5%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
Other	0.5%	4.0%	3.6%	4.5%	5.2%	10.0%	17.1%	5.1%

Source/Notes
(1) Market share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Expenditure Per Head on first choice and second choice shopping location assumed to be on a 70:30 split.
(3) Responses for 'farmers market' discounted, as this is covered by NSRT calculations.

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Convenience Analysis

Table Convenience 7: Turnover of Facilities by Market Shares for Convenience Goods Spending in 2007 (Second Choice)

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL
Population 2007	60,086	41,221	4,835	20,469	7,120	15,466	20,900	**170,096**
Total Available Convenience Expenditure in 2007 (£m)	£ 93.2	£ 68.3	£ 7.8	£ 33.1	£ 11.6	£ 25.7	£ 34.7	£ 274.5
Total Available Expenditure in 2007 (£m) (Second choice)	£ 28.0	£ 20.5	£ 2.3	£ 9.9	£ 3.5	£ 7.7	£ 10.4	£ 82.3
Zone 1A - Hereford City								
Hereford Centre								
Sainsburys, Barton Yard	£ 4.8	£ 3.1	£ 0.3	£ 0.5	£ 0.4	£ 0.1	£ 0.3	£ 9.6
Morrisons, Commercial Road	£ 4.1	£ 1.5	£ 0.1	£ 0.1	£ 0.5	£ 0.2	£ 0.1	£ 6.4
Tesco Metro, Bewell Street	£ 3.2	£ 1.5	£ 0.1	£ 0.1	£ 0.1	£ -	£ -	£ 4.9
Marks & Spencer, High Town	£ 3.8	£ 1.6	£ -	£ 0.2	£ -	£ 0.3	£ 0.4	£ 6.3
Aldi, Eign Street	£ 0.8	£ 0.4	£ -	£ -	£ -	£ -	£ -	£ 1.2
Butter Market, High Town	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.1
Iceland, Eign Gate	£ 0.5	£ 0.2	£ 0.1	£ -	£ -	£ -	£ -	£ 0.8
Outside Hereford Centre								
Tesco Abbotsmead Road	£ 2.9	£ 2.3	£ 0.1	£ 0.4	£ 0.2	£ 0.1	£ 0.3	£ 6.3
ASDA, Belmont Road	£ 3.9	£ 1.7	£ 0.2	£ 0.5	£ 0.1	£ 0.2	£ 0.4	£ 7.0
Tesco Express, Tupsley	£ 0.6	£ 0.2	£ -	£ 0.1	£ 0.1	£ -	£ 0.1	£ 1.0
Lidl, Brook Retail Park	£ 0.5	£ 0.7	£ 0.1	£ -	£ 0.4	£ -	£ 0.1	£ 1.7
Co-op, Grandstand Road	£ 0.6	£ 0.6	£ -	£ -	£ -	£ -	£ -	£ 1.2
Co-op, Whitecross Road	£ 0.6	£ 0.3	£ -	£ -	£ -	£ -	£ -	£ 0.9
Co-op, College Road	£ 0.3	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.5
Welcome, Holme Lacy Road	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1
One Stop, Belmont Road	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ -	£ 0.1
Farm Shop, Oakchurch	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1
Farmfoods, Belmont Road	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ 0.3
Local Stores, Hereford	£ 0.6	£ 0.9	£ 0.1	£ 0.2	£ -	£ -	£ -	£ 1.8
Zone 1B - Hereford Rural								
Elsewhere								
Canon Pyon Store, Canon Pyon	£ -	£ -	£ -	£ 0.1	£ -	£ -	£ -	£ 0.1
Local Stores, Ewyas Harold	£ -	£ 0.2	£ -	£ -	£ -	£ -	£ -	£ 0.2
Locks Garage, Allensmore	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1
Local Stores, Burghill	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1
Local Stores, Weobley	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1
Londis, Brampton Road, Madley	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1
Zone 2 - Kington								
Kington Centre								
Grapevine, Kington	£ -	£ -	£ 0.1	£ 0.1	£ -	£ -	£ -	£ 0.1
Nisa, High Street, Kington	£ -	£ -	£ 0.2	£ -	£ -	£ -	£ -	£ 0.1
Co-op, Crabtree Road, Kington	£ -	£ 0.1	£ 0.4	£ 0.2	£ -	£ -	£ -	£ 0.7
Ashby's, Kington	£ -	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ 0.1
Local Stores, Kington	£ -	£ 0.1	£ 0.1	£ 0.1	£ -	£ -	£ -	£ 0.3
Zone 3 - Leominster								
Leominster Centre								
Aldi, Dishley Road, Leominster	£ 0.1	£ 0.1	£ 0.1	£ 1.1	£ 0.1	£ -	£ -	£ 1.4
Somerfield, Dishley Road, Leominster	£ 0.1	£ 0.1	£ -	£ 3.2	£ -	£ -	£ -	£ 3.3
Local Stores, Leominster	£ 0.1	£ 0.2	£ -	£ 0.8	£ -	£ -	£ -	£ 0.3
Outside Leominster Centre								
Morrisons, Leominster	£ -	£ 1.2	£ 0.2	£ 1.9	£ 0.1	£ -	£ -	£ 3.6
Zone 4 - Bromyard								
Bromyard Centre								
Welcome (Co-op), Bromyard	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ -	£ 0.1
Co-op, Tenbury Road, Bromyard	£ -	£ 0.1	£ -	£ -	£ 0.6	£ -	£ -	£ 0.6
Local Stores, Bromyard	£ -	£ -	£ -	£ -	£ 0.3	£ -	£ -	£ 0.2
Zone 5 - Ledbury								
Ledbury Centre								
Somerfield, Ledbury	£ -	£ 0.1	£ -	£ -	£ 0.1	£ 2.7	£ -	£ 3.1
Local Stores, Ledbury	£ -	£ 0.1	£ -	£ -	£ -	£ 0.9	£ -	£ 0.3
Outside Ledbury Centre								
Tesco, Orchard Lane, Ledbury	£ -	£ 0.3	£ -	£ 0.1	£ 0.2	£ 1.6	£ 0.1	£ 2.4
Elsewhere								
Little Verzons Fruit Farm	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ 0.1
Zone 6 - Ross-on-Wye								
Ross-on-Wye Centre								
Morrisons, Ross-on-Wye	£ 0.2	£ 0.4	£ -	£ -	£ -	£ 0.2	£ 2.4	£ 3.3
Somerfield, The Maltings, Ross-on-Wye	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ 3.2	£ 3.3
Spar, High Street, Ross-on-Wye	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ 0.1
Co-op, Broad Street, Ross-on-Wye	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1
Local Stores, Ross-on-Wye	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.5	£ 0.5
Non Zone								
Waitrose, Monmouth	£ 0.1	£ 0.5	£ -	£ -	£ -	£ -	£ 0.8	£ 1.5
Waitrose, Malvern	£ -	£ 0.1	£ -	£ 0.1	£ 0.1	£ 0.5	£ -	£ 0.8
Waitrose, Abergavenny	£ 0.2	£ 0.3	£ -	£ -	£ -	£ -	£ -	£ 0.6
Other	£ 0.2	£ 0.8	£ 0.1	£ 0.5	£ 0.2	£ 0.8	£ 1.8	£ 4.2

Source/Notes
(1) Market share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Expenditure Per Head on first choice and second choice shopping location assumed to be on a 70:30 split.
(3) Responses for 'farmers market' discounted, as this is covered by NSRT calculations.

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Table Convenience 8: Turnover of Facilities from Market Shares for All Convenience Goods Spending in 2007

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL	Inflow of Expenditure (£m)	Total Turnover
Population 2007	60,086	41,221	4,835	20,469	7,120	15,466	20,900	**170,096**		
Expenditure per Capita in 2007	£ 1,552	£ 1,658	£ 1,618	£ 1,617	£ 1,623	£ 1,659	£ 1,662			
Total Available Expenditure in 2007 (£m)	£ 93.2	£ 68.3	£ 7.8	£ 33.1	£ 11.6	£ 25.7	£ 34.7	**£ 274.5**		
Zone 1A - Hereford City										
Hereford Centre										
Sainsburys, Barton Yard	£ 17.2	£ 14.7	£ 0.5	£ 1.3	£ 0.6	£ 0.3	£ 0.6	£ 35.1	£ 6.0	£ 41.1
Morrisons, Commercial Road	£ 17.1	£ 7.2	£ 0.1	£ 0.3	£ 1.0	£ 0.3	£ 0.2	£ 26.4	£ 4.5	£ 30.9
Tesco Metro, Bewell Street	£ 13.7	£ 6.2	£ 0.1	£ 0.2	£ 0.2	£ -	£ -	£ 20.4	£ 3.5	£ 23.9
Marks & Spencer (Food Hall), High Town	£ 5.2	£ 2.0	£ 0.1	£ 0.2	£ -	£ 0.3	£ 0.6	£ 8.5	£ 1.4	£ 9.9
Aldi, Eign Street	£ 1.0	£ 1.0	£ -	£ -	£ -	£ -	£ -	£ 1.9	£ 0.3	£ 2.3
Butter Market, High Town	£ 0.2	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.3	£ 0.1	£ 0.4
Iceland, Eign Gate	£ 0.5	£ 0.2	£ 0.1	£ -	£ -	£ -	£ -	£ 0.8	£ 0.1	£ 0.9
Outside Hereford Centre										
Tesco, Abbotsmead Road	£ 19.3	£ 12.8	£ 0.1	£ 0.8	£ 1.1	£ 0.2	£ 1.0	£ 35.1	£ 1.8	£ 36.9
ASDA, Belmont Road	£ 9.9	£ 3.4	£ 0.5	£ 0.8	£ 0.5	£ 0.3	£ 0.8	£ 16.2	£ 0.8	£ 17.0
Tesco Express, Tupsley	£ 1.4	£ 0.5	£ -	£ 0.1	£ 0.1	£ 0.8	£ 0.1	£ 3.0	£ -	£ 3.0
Lidl, Brook Retail Park	£ 1.6	£ 1.0	£ 0.1	£ 0.1	£ 0.5	£ 0.1	£ 0.1	£ 3.5	£ -	£ 3.5
Co-op, Grandstand Road	£ 1.4	£ 1.0	£ -	£ -	£ -	£ -	£ -	£ 2.4	£ -	£ 2.4
Co-op, Whitecross Road	£ 1.3	£ 0.6	£ -	£ -	£ 0.1	£ -	£ -	£ 2.0	£ -	£ 2.0
Co-op, College Road	£ 0.4	£ 0.2	£ 0.1	£ -	£ 0.1	£ -	£ -	£ 0.8	£ -	£ 0.8
Welcome, Holme Lacy Road	£ -	£ 0.3	£ -	£ -	£ -	£ -	£ -	£ 0.3	£ -	£ 0.3
One Stop, Belmont Road	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ -	£ 0.1	£ -	£ 0.1
Farm Shop, Oakchurch	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ 0.1
Farmfoods, Belmont Road	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ 0.2	£ -	£ 0.2
Local Stores, Hereford	£ 0.6	£ 0.9	£ 0.1	£ 0.2	£ -	£ -	£ -	£ 1.8	£ -	£ 1.8
Zone Total	**£ 90.9**	**£ 52.1**	**£ 1.8**	**£ 3.9**	**£ 4.3**	**£ 2.3**	**£ 3.4**	**£ 158.9**	**£ 18.4**	**£ 177.3**
Zone 1B - Hereford Rural										
Elsewhere										
Local Stores, Ewyas Harold	£ -	£ 0.5	£ -	£ -	£ -	£ -	£ -	£ 0.5	£ -	£ 0.5
Local Stores, Marden	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ 0.1
Local Stores, Peterchurch	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ 0.1
Local Stores, Longtown	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ 0.1
Canon Pyon Store, Canon Pyon	£ -	£ -	£ -	£ 0.1	£ -	£ -	£ -	£ 0.1	£ -	£ 0.1
Locks Garage, Allensmore	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ 0.1
Local Stores, Burghill	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ 0.1
Local Stores, Weobley	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ 0.1
Londis, Brampton Road, Madley	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ 0.1
Zone Total	**£ -**	**£ 1.0**	**£ -**	**£ 0.1**	**£ -**	**£ -**	**£ -**	**£ 1.1**	**£ -**	**£ 1.1**
Zone 2 - Kington										
Kington Centre										
Co-op, Crabtree Road, Kington	£ -	£ 1.3	£ 3.0	£ 0.7	£ -	£ -	£ -	£ 5.0	£ 0.8	£ 5.8
Grapevine, Kington	£ -	£ -	£ 0.1	£ 0.1	£ -	£ -	£ -	£ 0.2	£ 0.0	£ 0.2
Nisa, High Street, Kington	£ -	£ -	£ 0.2	£ -	£ -	£ -	£ -	£ 0.2	£ 0.0	£ 0.2
Ashby's, Kington	£ -	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ 0.1	£ 0.0	£ 0.1
Local Stores, Kington	£ -	£ 0.2	£ 0.9	£ 0.1	£ -	£ -	£ -	£ 1.2	£ 0.2	£ 1.4
Zone Total	**£ -**	**£ 1.6**	**£ 4.2**	**£ 0.8**	**£ -**	**£ -**	**£ -**	**£ 6.5**	**£ 1.0**	**£ 7.6**
Zone 3 - Leominster										
Leominster Centre										
Aldi, Dishley Road, Leominster	£ 0.1	£ 0.1	£ 0.1	£ 1.9	£ 0.2	£ -	£ -	£ 2.3	£ 0.4	£ 2.7
Somerfield, Dishley Road, Leominster	£ 0.1	£ 0.2	£ -	£ 6.9	£ -	£ -	£ -	£ 7.2	£ 1.4	£ 8.5
Local Stores, Leominster	£ 0.1	£ 0.2	£ -	£ 2.2	£ -	£ -	£ -	£ 2.5	£ 0.5	£ 2.9
Outside Leominster Centre										
Morrisons, Leominster	£ 0.4	£ 2.7	£ 1.3	£ 14.0	£ 0.7	£ 2.7	£ 0.1	£ 21.9	£ 2.1	£ 24.0
Zone Total	**£ 0.6**	**£ 3.1**	**£ 1.4**	**£ 24.9**	**£ 0.9**	**£ 2.7**	**£ 0.1**	**£ 33.8**	**£ 4.3**	**£ 38.1**
Zone 4 - Bromyard										
Bromyard Centre										
Co-op, Tenbury Road, Bromyard	£ -	£ -	£ -	£ -	£ 3.7	£ -	£ 0.1	£ 3.8	£ 0.8	£ 4.6
Welcome (Co-op), Bromyard	£ -	£ 0.1	£ -	£ -	£ 0.6	£ -	£ -	£ 0.7	£ 0.1	£ 0.8
Local Stores, Bromyard	£ -	£ -	£ -	£ -	£ 0.7	£ -	£ -	£ 0.7	£ 0.1	£ 0.8
Zone Total	**£ -**	**£ 0.1**	**£ -**	**£ -**	**£ 5.0**	**£ -**	**£ 0.1**	**£ 5.1**	**£ 1.1**	**£ 6.2**
Zone 5 - Ledbury										
Ledbury Centre										
Somerfield, Ledbury	£ -	£ 0.1	£ -	£ -	£ 0.1	£ 7.5	£ -	£ 7.7	£ 0.4	£ 8.1
Local Stores, Ledbury	£ -	£ 0.1	£ -	£ -	£ -	£ 1.5	£ -	£ 1.5	£ 0.1	£ 1.6
Outside Ledbury Centre										
Tesco, Orchard Lane, Ledbury	£ 0.4	£ 0.9	£ -	£ 0.1	£ 0.4	£ 11.2	£ 0.5	£ 13.5	£ 2.1	£ 15.6
Elsewhere										
Little Verzons Fruit Farm	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ 0.1	£ -	£ 0.1
Zone Total	**£ 0.4**	**£ 1.0**	**£ -**	**£ 0.1**	**£ 0.5**	**£ 20.2**	**£ 0.5**	**£ 22.7**	**£ 2.5**	**£ 25.3**
Zone 6 - Ross-on-Wye										
Ross-on-Wye Centre										
Morrisons, Ross-on-Wye	£ 0.3	£ 1.8	£ -	£ -	£ -	£ 0.2	£ 15.1	£ 17.4	£ 3.3	£ 20.7
Somerfield, The Maltings, Ross-on-Wye	£ 0.3	£ 0.1	£ -	£ -	£ -	£ -	£ 7.1	£ 7.5	£ 1.4	£ 9.0
Spar, High Street, Ross-on-Wye	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.2	£ 0.2	£ 0.0	£ 0.2
Co-op, Broad Street, Ross-on-Wye	£ -	£ 0.2	£ -	£ -	£ -	£ -	£ -	£ 0.2	£ 0.0	£ 0.2
Local Stores, Ross-on-Wye	£ -	£ 0.2	£ -	£ -	£ -	£ -	£ 1.0	£ 1.2	£ 0.2	£ 1.5
Elsewhere										
Londis, Wormelow	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ 0.1
Zone Total	**£ 0.5**	**£ 2.4**	**£ -**	**£ -**	**£ -**	**£ 0.2**	**£ 23.4**	**£ 26.6**	**£ 5.0**	**£ 31.6**
Non Zone										
Non Zone Total	**£ 0.6**	**£ 5.1**	**£ 0.2**	**£ 1.3**	**£ 0.8**	**£ 2.7**	**£ 7.2**	**£ 17.9**	**£ -**	**£ 17.9**

Source/Notes
(1) Market share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Inflow of total turnover from outside of Study Area based on results of in centre surveys of Hereford City Centre and the market town centres undertaken by Research and Marketing (November 2007). Zone 5 is an exception as the inflow to Sometfield store is adjusted down to 5%. Inflow for significant food stores outside market town centres allowed at half inflow rate to the main centre. Inflow to ASDA and Tesco outside Hereford city centre allowed at 5%.

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Table Convenience 9: Turnover of Facilities from Market Shares for All Convenience Goods Spending in 2011

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL	Inflow of Expenditure (£m)	Total Turnover
Population 2011	62,466	41,803	4,937	21,387	7,321	15,848	21,402	**175,164**		
Expenditure per Capita in 2011	£ 1,543	£ 1,649	£ 1,609	£ 1,608	£ 1,614	£ 1,650	£ 1,652			
Total Available Expenditure in 2011 (£m)	£ 96.4	£ 68.9	£ 7.9	£ 34.4	£ 11.8	£ 26.1	£ 35.4	**£ 281.0**		
Zone 1A - Hereford City										
Zone Total	**£ 94.0**	**£ 52.6**	**£ 1.8**	**£ 4.1**	**£ 4.4**	**£ 2.4**	**£ 3.5**	**£ 162.7**	**£ 18.9**	**£ 181.6**
Zone 1B - Hereford Rural										
Zone Total	**£ -**	**£ 1.1**	**£ -**	**£ 0.1**	**£ -**	**£ -**	**£ -**	**£ 1.1**	**£ -**	**£ 1.1**
Zone 2 - Kington										
Zone Total	**£ -**	**£ 1.6**	**£ 4.2**	**£ 0.8**	**£ -**	**£ -**	**£ -**	**£ 6.7**	**£ 1.1**	**£ 7.8**
Zone 3 - Leominster										
Zone Total	**£ 0.6**	**£ 3.2**	**£ 1.4**	**£ 25.8**	**£ 1.0**	**£ 2.7**	**£ 0.1**	**£ 34.6**	**£ 4.4**	**£ 39.0**
Zone 4 - Bromyard										
Zone Total	**£ -**	**£ 0.1**	**£ -**	**£ -**	**£ 5.1**	**£ -**	**£ 0.1**	**£ 5.3**	**£ 1.1**	**£ 6.4**
Zone 5 - Ledbury										
Zone Total	**£ 0.4**	**£ 1.0**	**£ -**	**£ 0.1**	**£ 0.5**	**£ 20.6**	**£ 0.5**	**£ 23.3**	**£ 2.6**	**£ 25.9**
Zone 6 - Ross-on-Wye										
Zone Total	**£ 0.6**	**£ 2.4**	**£ -**	**£ -**	**£ -**	**£ 0.2**	**£ 23.8**	**£ 27.2**	**£ 5.2**	**£ 32.4**
Non Zone										
Non Zone Total	**£ 0.7**	**£ 5.1**	**£ 0.2**	**£ 1.3**	**£ 0.8**	**£ 2.7**	**£ 7.3**	**£ 18.3**	**£ -**	**£ 18.3**

Source/Notes
(1) Market share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Inflow of total turnover from outside of Study Area based on results of in centre surveys of Hereford City Centre and the market town centres undertaken by Research and Marketing (November 2007.
Zone 5 Ledbury is an exception as the inflow to Sometfield store is adjusted down to 5%. Inflow for significant food stores outside market town centres allowed at half inflow rate to the main centre
Inflow to ASDA and Tesco outside Hereford city centre allowed at 5%.

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Table Convenience 10: Turnover of Facilities from Market Shares for All Convenience Goods Spending in 2016

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL	Inflow of Expenditure (£m)	Total Turnover
Population 2016	68,416	43,257	5,192	23,684	7,824	16,804	22,658	**187,834**		
Expenditure per Capita in 2016	£ 1,591	£ 1,699	£ 1,658	£ 1,658	£ 1,664	£ 1,700	£ 1,703			
Total Available Expenditure in 2016 (£m)	£ 104.1	£ 72.3	£ 8.4	£ 37.4	£ 12.6	£ 27.8	£ 37.5	**£ 300.0**		
Zone 1A - Hereford City										
Zone Total	**£ 101.5**	**£ 55.1**	**£ 1.9**	**£ 4.4**	**£ 4.7**	**£ 2.5**	**£ 3.7**	**£ 173.7**	**£ 20.2**	**£ 193.9**
Zone 1B - Hereford Rural										
Zone Total	**£ -**	**£ 1.1**	**£ -**	**£ 0.1**	**£ -**	**£ -**	**£ -**	**£ 1.2**	**£ -**	**£ 1.2**
Zone 2 - Kington										
Zone Total	**£ -**	**£ 1.7**	**£ 4.5**	**£ 0.9**	**£ -**	**£ -**	**£ -**	**£ 7.2**	**£ 1.1**	**£ 8.3**
Zone 3 - Leominster										
Zone Total	**£ 0.7**	**£ 3.3**	**£ 1.5**	**£ 28.1**	**£ 1.0**	**£ 2.9**	**£ 0.1**	**£ 36.9**	**£ 4.7**	**£ 41.7**
Zone 4 - Bromyard										
Zone Total	**£ -**	**£ 0.1**	**£ -**	**£ -**	**£ 5.4**	**£ -**	**£ 0.1**	**£ 5.6**	**£ 1.2**	**£ 6.8**
Zone 5 - Ledbury										
Zone Total	**£ 0.4**	**£ 1.1**	**£ -**	**£ 0.1**	**£ 0.6**	**£ 21.9**	**£ 0.5**	**£ 24.8**	**£ 2.8**	**£ 27.6**
Zone 6 - Ross-on-Wye										
Zone Total	**£ 0.6**	**£ 2.6**	**£ -**	**£ -**	**£ -**	**£ 0.2**	**£ 25.3**	**£ 29.1**	**£ 5.5**	**£ 34.6**
Non Zone										
Non Zone Total	**£ 0.7**	**£ 5.4**	**£ 0.2**	**£ 1.4**	**£ 0.9**	**£ 2.9**	**£ 7.8**	**£ 19.5**	**£ -**	**£ 19.5**

Source/Notes
(1) Market share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007)
(2) Inflow of total turnover from outside of Study Area based on results of in centre surveys of Hereford City Centre and the market town centres undertaken by Research and Marketing (November 2007
Zone 5 Ledbury is an exception as the inflow to Sometfield store is adjusted down to 5%. Inflow for significant food stores outside market town centres allowed at half inflow rate to the main centre
Inflow to ASDA and Tesco outside Hereford city centre allowed at 5%.

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Table Convenience 11: Turnover of Facilities from Market Shares for All Convenience Goods Spending in 2021

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL	Inflow of Expenditure (£m)	Total Turnover
Population 2021	68,416	43,257	5,192	23,684	7,824	16,804	22,658	**187,834**		
Expenditure per Capita in 2021	£ 1,658	£ 1,772	£ 1,729	£ 1,729	£ 1,735	£ 1,773	£ 1,776			
Total Available Expenditure in 2021 (£m)	£ 113.5	£ 76.6	£ 9.0	£ 40.9	£ 13.6	£ 29.8	£ 40.2	**£ 323.6**		
Zone 1A - Hereford City										
Zone Total	**£ 110.6**	**£ 58.5**	**£ 2.0**	**£ 4.9**	**£ 5.1**	**£ 2.7**	**£ 4.0**	**£ 187.4**	**£ 21.7**	**£ 209.1**
Zone 1B - Hereford Rural										
Zone Total	**£ -**	**£ 1.2**	**£ -**	**£ 0.1**	**£ -**	**£ -**	**£ -**	**£ 1.3**	**£ -**	**£ 1.3**
Zone 2 - Kington										
Zone Total	**£ -**	**£ 1.8**	**£ 4.8**	**£ 1.0**	**£ -**	**£ -**	**£ -**	**£ 7.7**	**£ 1.2**	**£ 9.0**
Zone 3 - Leominster										
Zone Total	**£ 0.8**	**£ 3.5**	**£ 1.6**	**£ 30.7**	**£ 1.1**	**£ 3.1**	**£ 0.1**	**£ 39.9**	**£ 5.1**	**£ 45.0**
Zone 4 - Bromyard										
Zone Total	**£ -**	**£ 0.1**	**£ -**	**£ -**	**£ 5.8**	**£ -**	**£ 0.1**	**£ 6.1**	**£ 1.3**	**£ 7.3**
Zone 5 - Ledbury										
Zone Total	**£ 0.5**	**£ 1.2**	**£ -**	**£ 0.1**	**£ 0.6**	**£ 23.5**	**£ 0.5**	**£ 26.8**	**£ 3.0**	**£ 29.8**
Zone 6 - Ross-on-Wye										
Zone Total	**£ 0.7**	**£ 2.7**	**£ -**	**£ -**	**£ -**	**£ 0.3**	**£ 27.1**	**£ 31.4**	**£ 5.9**	**£ 37.3**
Non Zone										
Non Zone Total	**£ 0.8**	**£ 5.7**	**£ 0.3**	**£ 1.6**	**£ 0.9**	**£ 3.1**	**£ 8.3**	**£ 21.1**	**£ -**	**£ 21.1**

<u>Source/Notes</u>
(1) Market share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Inflow of total turnover from outside of Study Area based on results of in centre surveys of Hereford City Centre and the market town centres undertaken by Research and Marketing (November 2007.
Zone 5 Ledbury is an exception as the inflow to Sometfield store is adjusted down to 5%. Inflow for significant food stores outside market town centres allowed at half inflow rate to the main centre
Inflow to ASDA and Tesco outside Hereford city centre allowed at 5%.

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Convenience Analysis

Table Convenience 12: Turnover of Facilities from Market Shares for All Convenience Goods Spending in 2026

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL	Inflow of Expenditure (£m)	Total Turnover
Population 2026	71,391	43,983	5,319	24,833	8,075	17,282	23,286	**194,169**		
Expenditure per Capita in 2026	£ 1,729	£ 1,847	£ 1,802	£ 1,802	£ 1,809	£ 1,848	£ 1,851			
Total Available Expenditure in 2026 (£m)	£ 123.4	£ 81.2	£ 9.6	£ 44.7	£ 14.6	£ 31.9	£ 43.1	**£ 348.6**		
Zone 1A - Hereford City										
Zone Total	**£ 120.3**	**£ 62.0**	**£ 2.2**	**£ 5.3**	**£ 5.5**	**£ 2.9**	**£ 4.3**	**£ 201.8**	**£ 23.4**	**£ 225.3**
Zone 1B - Hereford Rural										
Zone Total	**£ -**	**£ 1.2**	**£ -**	**£ 0.1**	**£ -**	**£ -**	**£ -**	**£ 1.4**	**£ -**	**£ 1.4**
Zone 2 - Kington										
Zone Total	**£ -**	**£ 1.9**	**£ 5.1**	**£ 1.1**	**£ -**	**£ -**	**£ -**	**£ 8.3**	**£ 1.3**	**£ 9.7**
Zone 3 - Leominster										
Zone Total	**£ 0.8**	**£ 3.7**	**£ 1.7**	**£ 33.6**	**£ 1.2**	**£ 3.3**	**£ 0.2**	**£ 42.9**	**£ 5.5**	**£ 48.4**
Zone 4 - Bromyard										
Zone Total	**£ -**	**£ 0.1**	**£ -**	**£ -**	**£ 6.3**	**£ -**	**£ 0.2**	**£ 6.5**	**£ 1.4**	**£ 7.9**
Zone 5 - Ledbury										
Zone Total	**£ 0.5**	**£ 1.2**	**£ -**	**£ 0.1**	**£ 0.7**	**£ 25.2**	**£ 0.6**	**£ 28.9**	**£ 3.2**	**£ 32.1**
Zone 6 - Ross-on-Wye										
Zone Total	**£ 0.7**	**£ 2.9**	**£ -**	**£ -**	**£ -**	**£ 0.3**	**£ 29.1**	**£ 33.8**	**£ 6.4**	**£ 40.2**
Non Zone										
Non Zone Total	**£ 0.8**	**£ 6.1**	**£ 0.3**	**£ 1.7**	**£ 1.0**	**£ 3.3**	**£ 8.9**	**£ 22.7**	**£ -**	**£ 22.7**

Source/Notes
(1) Market share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Inflow of total turnover from outside of Study Area based on results of in centre surveys of Hereford City Centre and the market town centres undertaken by Research and Marketing (November 2007) is an exception as the inflow to Sometfield store is adjusted down to 5%. Inflow for significant food stores outside market town centres allowed at half inflow rate to the main centre. Inflow to ASDA and Tesco outside Hereford city centre allowed at 5%.

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Convenience Analysis

Table Convenience 13: Facilities and Benchmark Turnovers in 2007

	Net Convenience Floorspace (sq m)	Benchmark Turnover (£/ sqm) 2007	Benchmark Turnover (£m) 2007
Zone 1A - Hereford City			
Hereford Centre	**11,750**	**£ 9,163**	**£ 107.7**
Outside Hereford Centre	**7,655**	**£ 10,249**	**£ 78.5**
Zone 1B - Hereford Rural			
Elsewhere	**599**	**£ 3,500**	**£ 2.1**
Zone 2 - Kington			
Kington Centre	**1,480**	**£ 4,481**	**£ 6.6**
Zone 3 - Leominster			
Leominster Centre	**2,491**	**£ 4,583**	**£ 11.4**
Outside Leominster Centre	**1,911**	**£ 9,662**	**£ 18.5**
Zone 4 - Bromyard			
Bromyard Centre	**1,287**	**£ 5,630**	**£ 7.2**
Zone 5 - Ledbury			
Ledbury Centre	**1,826**	**£ 4,207**	**£ 7.7**
Somerfield, Ledbury	768		£ 4.0
Local Stores, Ledbury	1,058		£ 3.7
Outside Ledbury Centre	**1,229**	**£ 13,647**	**£ 16.8**
Tesco, Orchard Lane, Ledbury	1,229		£ 16.8
Elsewhere	**63**		
Zone 6 - Ross-on-Wye			
Ross-on-Wye Centre	**4,545**	**£ 6,720**	**£ 30.5**
Elsewhere	**121**	**£ 3,500**	**£ 0.4**
Non Zone			
Waitrose, Monmouth	1,778		£ 20.4
Waitrose, Great Malvern	2,071		£ 23.7
Tesco, Gloucester	2,470		£ 33.7
Waitrose, Abergavenny	2,021		£ 23.1
Other	417		£ 1.5

Source/Notes
(1) Floorspaces from IGD Foodstores (2007), Promap (2008) and information obtained from Herefordshire Council.
(2) Gross:net ratios are taken from IGD Foodstores (2007), Herefordshire Council data and Drivers Jonas Deloitte Deloitte estimates.
(3) Convenience / Comparison split for named retailers taken from Retail Rankings (2007) and adjusted where store specific arrangement is known.
(4) Sales density of named retailers from Retail Rankings (2007) converted to 2006 Prices using Experian Retail Planner Briefing Note 5.1. (2007) Annex 1.
(5) Turnover per sq m is based on Drivers Jonas Deloitte estimates where company averages are unavailable.
(6) Net floorspace of 'Local Stores' in each Centre derived from GOAD, with exception of Hereford Outside Centre, Kington and Bromyard which are Jonas Deloitte judgements based on retailing elsewhere.
(7) Allowance for increased sales density of 0.4% per annum applied 2006-2007.
(8) One Stop on Belmont Road, Hereford has now ceased trading.

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Table Convenience 14: Survey Derived Flows of Expenditure to Convenience Shopping Locations Compared to Benchmark Turnovers in 2007

	Survey Derived Turnover (£m)	Benchmark Turnover (£m)	Difference (£m)
Zone 1A - Hereford City			
Zone Total	£177.34	£186.12	-£8.78
Zone 1B - Hereford Rural			
Zone Total	£1.12	£2.09	-£0.98
Zone 2 - Kington			
Zone Total	£7.60	£6.63	£0.97
Zone 3 - Leominster			
Zone Total	£38.14	£29.88	£8.25
Zone 4 - Bromyard			
Zone Total	£6.22	£7.24	-£1.02
Zone 5 - Ledbury			
Zone Total	£25.28	£24.67	£0.61
Zone 6 - Ross-on-Wye			
Zone Total	£31.63	£30.97	£0.67
TOTAL	£287.32	£287.61	-£0.29

Source/Notes
(1) From Tables 9 and 13.

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Table Convenience 15: Estimated Turnover of Retail Commitments (as of July 2010)

Application number	Date of Decision	Date of Expiry	Location	Proposals	Development Type	Total Gross A1 floorspace (sq m)	Total Net A1 floorspace (sq m)	Notes	Net Convenience Floorspace (sq m)	Benchmark Turnover (£/ sqm) 2006	Benchmark Turnover (£m) 2006	Benchmark Turnover (£m) 2007
Zone 1A - Hereford City												
DCCE2007/0709/F	02-May-07	02-May-10	12 Mill Street, Hereford, HR1 2NY	Proposed change of use of playroom to oriental grocers.	Minor Change of Use	63	47	Assumed all convenience floorspace	47	£ 4,000	£ 0.2	£ 0.19
Zone Total												**£ 0.19**
Zone 1B - Hereford Rural												
Zone Total												**£ -**
Zone 2 - Kington												
			10 Headbrook, Kington	Change of use from cabinet makers to catering kitchen, associated shop and tea shop	Minor Change of Use	23	17	Assumed all convenience floorspace	17	£ 3,500	£ 0.1	£ 0.06
Zone Total												**£ 0.06**
Zone 3 - Leominster												
			The Dovecote, Eardisland, Leominster	Change of use of ground floor to allow operation as grocery store	Minor Change of Use	40	30	Assumed all convenience floorspace	30	£ 3,500	£ 0.1	£ 0.11
DCNC2008/1233/F	27/08/2008	27/08/2011	Morrisons, Baron's Cross Road, Leominster	Extension for additional sales area	Extension	405	365	Assumed 77:23 convenience/comparison goods floorspace split	281	£10,977	£ 3.1	£ 3.12
Zone Total												**£ 3.22**
Zone 4 - Bromyard												
Zone Total												**£ -**
Zone 5 - Ledbury												
DCNE2007/2883/F	02-Nov-07	02-Nov-10	Little Verzons, Munsley, Ledbury, Herefordshire, HR8 2PZ	Proposed extension to shop (in place of existing polytunnel NE2000/2703/F) and new vehicular access.	Extension	110	82	Assumed all convenience floorspace	82	£ 3,500	£ 0.3	£ 0.29
Zone Total												**£ 0.29**
Zone 6 - Ross-on-Wye												
DCSE2007/2569/F	08-Oct-07	08-Oct-10	Pengethley Garden Centre, Peterstow, Ross-On-Wye, Herefordshire, HR9 6LL	Extension of farm shop within garden centre complex.	Minor Others	143	107	Assumed all convenience floorspace	107	£ 3,500	£ 0.4	£ 0.38
DCSE2007/2556/F	17-Sep-08	18-Sep-11	Gardner Butcher Garages, Brookend Street, Ross-on-Wye, Herefordshire, HR9 7EG	Erection of Aldi discount food store with associated parking, landscaping and access.	Full Planning Application	1,313	900	Assumed 90:10 convenience/comparison goods floorspace split	810	£ 5,325	£ 4.3	£ 4.36
DCSE2008/2414/F	10-Jun-09	11-Jun-12	Morrisons, Station Street, Ross-on-Wye	Extension and alteration to existing superstore	Extension	3716 (inc. existing)	1,002	Assumed 78:22 convenience/comparison goods floorspace split	782	£10,977	£ 8.6	£ 8.67
Zone Total												**£ 13.41**
Total												**£ 17.17**

Source/Notes
(1) Data from Herefordshire Council, July 2010.
(2) Sales density in 2006 are Drivers Jonas Deloitte estimates based on Verdict on Grocers and Mintel's Retail Rankings.
(3) Convenience/comparison floorspace split is Drivers Jonas Deloitte estimate unless otherwise stated.
(4) Gross: net ratio assumed 75% unless provided.

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Table Convenience 16: Summary of Capacity

	2007	2011	2016	2021	2026
Zone 1 - Hereford					
Total Population	101,307	104,269	107,971	111,673	115,374
Total Available Expenditure (£m)	£ 161.6	£ 165.3	£ 176.4	£ 190.1	£ 204.7
Retained Expenditure (%)	89%	89%	89%	89%	89%
Retained Expenditure (£m)	£ 143.1	£ 146.6	£ 156.6	£ 169.1	£ 182.3
Inflow	£ 34.3	£ 35.0	£ 37.2	£ 40.0	£ 43.0
Inflow %	19.3%	19.3%	19.2%	19.1%	19.1%
Actual Turnover of Existing Shops	£ 177.3	£ 181.6	£ 193.9	£ 209.1	£ 225.3
Benchmark Turnover	£ 186.1	£ 187.5	£ 191.3	£ 195.6	£ 200.1
Edgar Street Grid			£ 23.9	£ 24.5	£ 25.0
Other Commitments	£ -	£ 0.2	£ 0.2	£ 0.2	£ 0.2
Expenditure Surplus	£ -	£ -	£ -	£ -	£ -
Benchmark Sales Density (Discount Store)	£ 4,259	£ 4,291	£ 4,378	£ 4,477	£ 4,579
Net Floorspace Requirement	0	0	0	0	0
Gross Floorspace Requirement	0	0	0	0	0
Benchmark Sales Density (Quality Store)	£ 11,585	£ 11,672	£ 11,907	£ 12,178	£ 12,454
Net Floorspace Requirement	0	0	0	0	0
Gross Floorspace Requirement	0	0	0	0	0
Zone 2 - Kington					
Total Population	4,835	4,937	5,064	5,192	5,319
Total Available Expenditure (£m)	£ 7.8	£ 7.9	£ 8.4	£ 9.0	£ 9.6
Retained Expenditure (%)	53.2%	53.2%	53.2%	53.2%	53.2%
Retained Expenditure (£m)	£ 4.2	£ 4.2	£ 4.5	£ 4.8	£ 5.1
Inflow	£ 3.4	£ 3.6	£ 3.8	£ 4.2	£ 4.6
Inflow %	45.3%	45.7%	46.2%	46.7%	47.2%
Actual Turnover of Existing Shops	£ 7.6	£ 7.8	£ 8.3	£ 9.0	£ 9.7
Benchmark Turnover	£ 6.6	£ 6.7	£ 6.8	£ 7.0	£ 7.1
Commitments	£ -	£ 0.1	£ 0.1	£ 0.1	£ 0.1
Expenditure Surplus	£ 1.0	£ 1.0	£ 1.4	£ 1.9	£ 2.5
Benchmark Sales Density (Discount Store)	£ 4,259	£ 4,291	£ 4,378	£ 4,477	£ 4,579
Net Floorspace Requirement	227	241	326	430	537
Gross Floorspace Requirement	302	322	435	573	715
Benchmark Sales Density (Quality Store)	£ 11,585	£ 11,672	£ 11,907	£ 12,178	£ 12,454
Net Floorspace Requirement	83	89	120	158	197
Gross Floorspace Requirement	111	118	160	211	263

Zone 3 - Leominster					
Total Population	**20,469**	**21,387**	**22,536**	**23,684**	**24,833**
Total Available Expenditure (£m)	**£ 33.1**	**£ 34.4**	**£ 37.4**	**£ 40.9**	**£ 44.7**
Retained Expenditure (%)	**75.1%**	**75.1%**	**75.1%**	**75.1%**	**75.1%**
Retained Expenditure (£m)	**£ 24.9**	**£ 25.8**	**£ 28.1**	**£ 30.7**	**£ 33.6**
Inflow	**£ 13.3**	**£ 13.2**	**£ 13.6**	**£ 14.2**	**£ 14.9**
Inflow %	**34.8%**	**33.9%**	**32.7%**	**31.7%**	**30.7%**
Actual Turnover of Existing Shops	**£ 38.1**	**£ 39.0**	**£ 41.7**	**£ 45.0**	**£ 48.4**
Benchmark Turnover	**£ 29.9**	**£ 30.1**	**£ 30.7**	**£ 31.4**	**£ 32.1**
Commitments	**£ -**	**£ 3.2**	**£ 3.3**	**£ 3.4**	**£ 3.5**
Expenditure Surplus	**£ 8.3**	**£ 5.7**	**£ 7.7**	**£ 10.2**	**£ 12.9**
Benchmark Sales Density (Discount Store)	**£ 4,259**	**£ 4,291**	**£ 4,378**	**£ 4,477**	**£ 4,579**
Net Floorspace Requirement	**1,938**	**1,326**	**1,751**	**2,271**	**2,808**
Gross Floorspace Requirement	**2,584**	**1,768**	**2,335**	**3,028**	**3,744**
Benchmark Sales Density (Quality Store)	**£ 11,585**	**£ 11,672**	**£ 11,907**	**£ 12,178**	**£ 12,454**
Net Floorspace Requirement	**712**	**487**	**644**	**835**	**1,032**
Gross Floorspace Requirement	**950**	**650**	**858**	**1,113**	**1,377**
Zone 4 - Bromyard					
Total Population	**7,120**	**7,321**	**7,573**	**7,824**	**8,075**
Total Available Expenditure (£m)	**£ 11.6**	**£ 11.8**	**£ 12.6**	**£ 13.6**	**£ 14.6**
Retained Expenditure (%)	**42.9%**	**42.9%**	**42.9%**	**42.9%**	**42.9%**
Retained Expenditure (£m)	**£ 5.0**	**£ 5.1**	**£ 5.4**	**£ 5.8**	**£ 6.3**
Inflow	**£ 1.3**	**£ 1.3**	**£ 1.4**	**£ 1.5**	**£ 1.6**
Inflow %	**20.2%**	**20.3%**	**20.5%**	**20.6%**	**20.7%**
Actual Turnover of Existing Shops	**£ 6.2**	**£ 6.4**	**£ 6.8**	**£ 7.3**	**£ 7.9**
Benchmark Turnover	**£ 7.2**	**£ 7.3**	**£ 7.4**	**£ 7.6**	**£ 7.8**
Commitments	**£ -**	**£ -**	**£ -**	**£ -**	**£ -**
Expenditure Surplus	**£ -**	**£ -**	**£ -**	**£ -**	**£ -**
Benchmark Sales Density (Discount Store)	**£ 4,259**	**£ 4,291**	**£ 4,378**	**£ 4,477**	**£ 4,579**
Net Floorspace Requirement	**0**	**0**	**0**	**0**	**0**
Gross Floorspace Requirement	**0**	**0**	**0**	**0**	**0**
Benchmark Sales Density (Quality Store)	**£ 11,585**	**£ 11,672**	**£ 11,907**	**£ 12,178**	**£ 12,454**
Net Floorspace Requirement	**0**	**0**	**0**	**0**	**0**
Gross Floorspace Requirement	**0**	**0**	**0**	**0**	**0**
Zone 5 - Ledbury					
Total Population	**15,466**	**15,848**	**16,326**	**16,804**	**17,282**
Total Available Expenditure (£m)	**£ 25.7**	**£ 26.1**	**£ 27.8**	**£ 29.8**	**£ 31.9**
Retained Expenditure (%)	**78.6%**	**78.6%**	**78.6%**	**78.6%**	**78.6%**
Retained Expenditure (£m)	**£ 20.2**	**£ 20.5**	**£ 21.8**	**£ 23.4**	**£ 25.1**
Inflow	**£ 5.0**	**£ 5.3**	**£ 5.7**	**£ 6.3**	**£ 6.9**
Inflow %	**20.0%**	**20.4%**	**20.8%**	**21.2%**	**21.6%**
Actual Turnover of Existing Shops	**£ 25.2**	**£ 25.8**	**£ 27.6**	**£ 29.7**	**£ 32.0**
Benchmark Turnover	**£ 24.4**	**£ 24.6**	**£ 25.1**	**£ 25.7**	**£ 26.3**
Commitments	**£ -**	**£ 0.3**	**£ 0.3**	**£ 0.3**	**£ 0.3**
Expenditure Surplus	**£ 0.8**	**£ 0.9**	**£ 2.1**	**£ 3.7**	**£ 5.4**
Benchmark Sales Density (Discount Store)	**£ 4,259**	**£ 4,291**	**£ 4,378**	**£ 4,477**	**£ 4,579**
Net Floorspace Requirement	**179**	**206**	**487**	**831**	**1,186**
Gross Floorspace Requirement	**238**	**275**	**650**	**1,108**	**1,581**
Benchmark Sales Density (Quality Store)	**£ 11,585**	**£ 11,672**	**£ 11,907**	**£ 12,178**	**£ 12,454**
Net Floorspace Requirement	**66**	**76**	**179**	**306**	**436**
Gross Floorspace Requirement	**88**	**101**	**239**	**407**	**581**

Zone 6 - Ross-on-Wye					
Total Population	20,900	21,402	22,030	22,658	23,286
Total Available Expenditure (£m)	£ 34.7	£ 35.4	£ 37.5	£ 40.2	£ 43.1
Retained Expenditure (%)	67.4%	67.4%	67.4%	67.4%	67.4%
Retained Expenditure (£m)	£ 23.4	£ 23.8	£ 25.3	£ 27.1	£ 29.1
Inflow	£ 8.1	£ 8.4	£ 9.2	£ 10.1	£ 11.0
Inflow %	25.8%	26.2%	26.6%	27.1%	27.5%
Actual Turnover of Existing Shops	£ 31.5	£ 32.3	£ 34.5	£ 37.2	£ 40.1
Benchmark Turnover	£ 30.5	£ 30.8	£ 31.4	£ 32.1	£ 32.8
Commitments	£ -	£ 9.1	£ 13.8	£ 14.1	£ 14.4
Expenditure Surplus	£ 1.0	£ -	£ -	£ -	£ -
Benchmark Sales Density (Discount Store)	£ 4,259	£ 4,291	£ 4,378	£ 4,477	£ 4,579
Net Floorspace Requirement	233	0	0	0	0
Gross Floorspace Requirement	311	0	0	0	0
Benchmark Sales Density (Quality Store)	£ 11,585	£ 11,672	£ 11,907	£ 12,178	£ 12,454
Net Floorspace Requirement	86	0	0	0	0
Gross Floorspace Requirement	114	0	0	0	0

Source/Notes

(1) £11,585 psm floorspace equivalent from average of largest food retailers (Tesco, Sainsburys, ASDA and Morrisons) and £4,259 psm floorspace equivilant from average dicounter food (Netto, Aldi, Lidl and Iceland) retailer taken from Retail Rankings 2007.

(2) Figures from Tables 1, 3, 8-12, 14 and 15.

(3) Figures exclude facilities located 'elsewhere' i.e. facilities located beyond the key town or city examined in the above analysis.

(4) Values expressed in £m.

(5) Net to gross ratio assumed to be 75%.

(6) 2006 prices.

(7) Floorspace efficiency assumed to be half of expenditure growth rate per annum for all centres / locations

(8) Date at which commitments are introduced is based on Drivers Jonas Deloitte estimates based on nature of proposals

(9)Figures for Edgar Street Grid assume a circa 3,500 sq.m. gross / 2,450 sq.m. net (85% convenience/15% comparison goods) foodstore, with a sales density of £11,500

Appendix 3

Comparison Goods Economic Analysis

Herefordshire PPS4 Assessment
Comparison Goods Assessment

Table Comparison 1: Study Area Population Estimates

Study Area Zones	2006	2007	2011	2016	2021	2026
Zone 1A - Hereford City	59,491	60,086	62,466	65,441	68,416	71,391
Zone 1B - Hereford Rural	41,076	41,221	41,803	42,530	43,257	43,983
Zone 2 - Kington	4,809	4,835	4,937	5,064	5,192	5,319
Zone 3 - Leominster	20,239	20,469	21,387	22,536	23,684	24,833
Zone 4 - Bromyard	7,070	7,120	7,321	7,573	7,824	8,075
Zone 5 - Ledbury	15,370	15,466	15,848	16,326	16,804	17,282
Zone 6 - Ross-on-Wye	20,774	20,900	21,402	22,030	22,658	23,286
Total	**168,829**	**170,096**	**175,164**	**181,499**	**187,834**	**194,169**

Source/Notes
(1) Study Area defined as shown in Appendix 1.
(2) Population figures for 2006 taken from Experian Demographic Report (January 2008).
(3) Population growth based on Housing Distribution identified in Herefordshire Core Strategy Place Shaping Document (as per RSS Phase II Preferred Strategy). For the towns this equates to growth over the plan period of 8,500 dwellings in Hereford, 2,500 dwellings in Leominster, 1,000 dwellings in Ledbury, 1,000 dwellings in Ross on Wye, 500 dwellings in Bromyard and 200 dwellings in Kington. Growth in rural areas is based on RSC/Hub allocations identified by Herefordshire Council in June 2010. The remainder of unallocated rural growth (2,600 dwellings) has been apportioned to Zones 1B-6 based on 2006 proportions of population. All additional dwellings are translated into population figures using the household density ratios and population projections produced by Herefordshire Council (June 2010).
(4) Study area population forecasts differ from county estimates due to catchment boundary differences and Experian base data (see supporting report)

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 2: Comparison Expenditure per Head 2007

Goods Category	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
Clothing materials and garments	£581	£626	£583	£588	£589	£614	£634
Shoes and other footwear	£94	£87	£86	£90	£90	£91	£90
Materials for maintenance and repair of the dwelling	£98	£131	£122	£119	£115	£122	£124
Furniture and furnishings; carpets and other floor coverings	£294	£340	£325	£316	£308	£331	£334
Household textiles	£131	£185	£179	£165	£168	£169	£170
Major household appliances (electric or not)	£65	£79	£75	£74	£72	£75	£75
Small electrical household appliances	£11	£14	£13	£13	£13	£13	£13
Small tools and miscellaneous accessories	£58	£76	£71	£67	£68	£71	£72
Glassware, tableware and household utensils	£75	£100	£97	£90	£92	£93	£93
10% of Non-Durable household goods	£6	£7	£6	£6	£6	£7	£7
Major tools and equipment	£6	£9	£9	£8	£8	£8	£9
Medical goods and other pharmaceutical products	£87	£90	£89	£85	£87	£91	£98
Therapeutic appliances and equipment	£38	£47	£43	£43	£43	£44	£46
Bicycles	£12	£10	£10	£11	£2	£12	£10
Recording media	£117	£126	£126	£123	£123	£128	£121
Games, toys and hobbies; sport and camping; musical instruments	£371	£351	£334	£341	£350	£358	£355
Gardens, plants and flowers	£57	£83	£77	£73	£75	£79	£76
Pets and related products	£57	£81	£76	£75	£74	£73	£73
Books and stationery	£110	£134	£126	£124	£126	£133	£127
Audio-visual, photographic and information processing equipment	£257	£270	£259	£261	£264	£270	£267
Appliances for personal care	£261	£256	£252	£260	£254	£266	£267
Jewellery, clocks and watches	£77	£75	£77	£77	£73	£78	£79
Other personal effects	£38	£35	£33	£36	£35	£37	£37
Total Expenditure per Head	**£2,904**	**£3,211**	**£3,067**	**£3,047**	**£3,035**	**£3,162**	**£3,178**

Sources/Notes:
(1) 2006 base EPH from Experian E-Marketer (January 2008).
(2) NRST not deducted at this stage
(3) 2006 Prices.

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 3: Comparison Expenditure per Capita

	2006	2007	2011	2016	2021	2026
Zone 1A - Hereford City	£2,583	£2,712	£2,781	£3,105	£3,742	£4,519
Zone 1B - Hereford Rural	£2,856	£2,999	£3,075	£3,434	£4,138	£4,997
Zone 2 - Kington	£2,727	£2,864	£2,937	£3,280	£3,952	£4,772
Zone 3 - Leominster	£2,710	£2,846	£2,918	£3,259	£3,927	£4,742
Zone 4 - Bromyard	£2,699	£2,835	£2,907	£3,246	£3,911	£4,723
Zone 5 - Ledbury	£2,812	£2,954	£3,029	£3,382	£4,075	£4,921
Zone 6 - Ross-on-Wye	£2,826	£2,968	£3,043	£3,398	£4,094	£4,945

Sources/Notes:
(1) 2006 base EPH from Experian E-Marketer (January 2008).
(2) EPH projected to Study Years utilising Experian's Retail Planner Briefing Note 7.1 (August 2009), Figure 1, advised growth rates: 2007: 4.8% (Experian Briefing Note 6.1), 2008: 2.7%, 2009: 1.1%, 2010: -0.4%, 2011: 1.1%, 2012-2016: 2.5%, 2017-26: 3.8% (Drivers Jonas Deloitte estimate)
(3) Non-Store Retail Trade Adjustment Taken from Experian Retail Planner Briefing Note 7.1 (August 2009) Appendix 3
(4) 2006 Prices.

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 4: Total Available Comparison Expenditure

	2006	2007	2011	2016	2021	2026
Zone 1A - Hereford City	£ 153.6	£ 163.0	£ 173.7	£ 203.2	£ 256.0	£ 322.6
Zone 1B - Hereford Rural	£ 117.3	£ 123.6	£ 128.6	£ 146.0	£ 179.0	£ 219.8
Zone 2 - Kington	£ 13.1	£ 13.8	£ 14.5	£ 16.6	£ 20.5	£ 25.4
Zone 3 - Leominster	£ 54.8	£ 58.3	£ 62.4	£ 73.4	£ 93.0	£ 117.8
Zone 4 - Bromyard	£ 19.1	£ 20.2	£ 21.3	£ 24.6	£ 30.6	£ 38.1
Zone 5 - Ledbury	£ 43.2	£ 45.7	£ 48.0	£ 55.2	£ 68.5	£ 85.0
Zone 6 - Ross-on-Wye	£ 58.7	£ 62.0	£ 65.1	£ 74.9	£ 92.8	£ 115.1
Total Study Area	**£ 459.9**	**£ 486.6**	**£ 513.6**	**£ 593.9**	**£ 740.4**	**£ 923.9**
			2007-2011	**2007-2016**	**2007-2021**	**2007-2026**
Cumulative Expenditure Growth (£m)			£ 27.0	£ 107.3	£ 253.8	£ 437.3
Cumulative Expenditure Growth (%)			6%	22%	52%	90%

Sources/Notes:
(1) Figures calculated by multiplying Table Comparison 1 by Table Comparison 3.
(2) 2006 prices.

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 5: Market Shares for Clothing, Footwear and Other Fashion Goods Spending in 2007 (First Choice)

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL
Zone 1A - Hereford City								
Hereford Centre								
Hereford (including individual stores)	86.6%	83.1%	62.4%	79.4%	54.3%	36.3%	31.6%	68.5%
Sainsburys	0.5%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Tesco, Hereford	1.5%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%
Outside Hereford Centre								
Hereford Retail Park	0.2%	0.3%	0.0%	3.0%	0.0%	0.0%	0.6%	0.6%
ASDA, Belmont Road	1.3%	0.3%	3.1%	0.0%	0.0%	0.0%	0.0%	0.7%
Tesco, Abbotsmead Road	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Belmont Road Park	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Brook Retail Park	0.2%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Zone 1B - Hereford Rural								
Zone 2 - Kington								
Kington Centre								
Kington	0.0%	0.0%	21.9%	0.0%	0.0%	0.0%	0.0%	0.7%
Zone 3 - Leominster								
Leominster Centre								
Leominster	0.2%	0.0%	0.0%	17.4%	0.0%	0.8%	0.0%	1.8%
Zone 4 - Bromyard								
Bromyard Centre								
Bromyard	0.2%	0.0%	0.0%	0.0%	4.4%	0.8%	0.0%	0.4%
Zone 5 - Ledbury								
Ledbury Centre								
Ledbury	0.0%	0.6%	0.0%	0.0%	0.0%	9.5%	0.6%	1.3%
Outside Ledbury Centre								
Tesco, Ledbury	0.0%	0.0%	0.0%	0.9%	0.0%	0.8%	0.0%	0.1%
Zone 6 - Ross-on-Wye								
Ross on Wye Centre								
Ross on Wye	0.5%	0.9%	0.0%	0.0%	0.0%	0.8%	18.5%	3.2%
Gloucester Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.1%
Outside Ross on Wye Centre								
Ross Labels	0.5%	0.7%	0.0%	0.0%	0.0%	0.8%	4.0%	1.0%
Non Zone								
Cheltenham	0.5%	3.4%	0.0%	0.9%	0.0%	8.7%	9.9%	3.6%
Worcester	0.7%	0.7%	0.0%	0.9%	32.6%	9.5%	0.0%	2.9%
Gloucester	0.0%	0.0%	0.0%	0.0%	0.0%	10.3%	12.4%	2.8%
Great Malvern	0.5%	0.0%	0.0%	2.1%	0.0%	5.2%	0.0%	1.0%
Cribbs Causeway	0.7%	1.2%	0.0%	0.0%	0.0%	0.0%	1.3%	0.8%
Birmingham	1.0%	0.7%	0.0%	0.9%	0.0%	0.0%	0.0%	0.7%
Abroad	0.7%	1.2%	3.1%	2.1%	2.2%	0.0%	0.0%	1.0%
OTHER	3.8%	4.7%	9.4%	9.7%	6.6%	6.7%	8.7%	7.1%

Source/Notes
(1) Market Share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Figures have been adjusted to compensate for respondents who answered "don't buy".

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 6: Turnover of Facilities from Market Shares of Clothing, Footwear and Other Fashion Goods Spending in 2007 (First Choice)

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL
Population 2007	60,086	41,221	4,835	20,469	7,120	15,466	20,900	170,096
Expenditure per Capita in 2007	£ 472	£ 499	£ 469	£ 475	£ 475	£ 494	£ 507	
Total Available Expenditure in 2007 (£m)	£ 28.4	£ 20.6	£ 2.3	£ 9.7	£ 3.4	£ 7.6	£ 10.6	£ 82.6
Zone 1A - Hereford City								
Hereford Centre								
Hereford (including individual stores)	£ 24.5721	£ 17.1150	£ 1.4133	£ 7.7166	£ 1.8367	£ 2.7746	£ 3.3484	£ 58.8
Sainsburys	£ 0.1312	£ 0.1899	£ -	£ -	£ -	£ -	£ -	£ 0.3
Tesco, Hereford	£ 0.4265	£ 0.1899	£ -	£ -	£ -	£ -	£ -	£ 0.6
Outside Hereford Centre								
Hereford Retail Park	£ 0.1	£ 0.1	£ -	£ 0.3	£ -	£ -	£ 0.1	£ 0.5
ASDA, Belmont Road	£ 0.4	£ 0.1	£ 0.1	£ -	£ -	£ -	£ -	£ 0.5
Tesco, Abbotsmead Road	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.1
Belmont Road Park	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.1
Brook Retail Park	£ 0.07	£ 0.05	£ -	£ -	£ -	£ -	£ -	£ 0.1
Zone 1B - Hereford Rural								
Zone 2 - Kington								
Kington Centre								
Kington	£ -	£ -	£ 0.5	£ -	£ -	£ -	£ -	£ 0.5
Zone 3 - Leominster								
Leominster Centre								
Leominster	£ 0.1	£ -	£ -	£ 1.7	£ -	£ 0.1	£ -	£ 1.8
Zone 4 - Bromyard								
Bromyard Centre								
Bromyard	£ 0.1	£ -	£ -	£ -	£ 0.1	£ 0.1	£ -	£ 0.3
Zone 5 - Ledbury								
Ledbury Centre								
Ledbury	£ -	£ 0.1	£ -	£ -	£ -	£ 0.7	£ 0.1	£ 0.9
Outside Ledbury Centre								
Tesco, Ledbury	£ -	£ -	£ -	£ 0.1	£ -	£ 0.1	£ -	£ 0.2
Zone 6 - Ross-on-Wye								
Ross on Wye Centre								
Ross on Wye	£ 0.1	£ 0.2	£ -	£ -	£ -	£ 0.1	£ 2.0	£ 2.3
Gloucester Road	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ 0.1
Outside Ross on Wye Centre								
Ross Labels	£ 0.1	£ 0.1	£ -	£ -	£ -	£ 0.1	£ 0.4	£ 0.8
Non Zone								
Cheltenham	£ 0.1	£ 0.7	£ -	£ 0.1	£ -	£ 0.7	£ 1.0	£ 2.6
Worcester	£ 0.2	£ 0.1	£ -	£ 0.1	£ 1.1	£ 0.7	£ -	£ 2.3
Gloucester	£ -	£ -	£ -	£ -	£ -	£ 0.8	£ 1.3	£ 2.1
Great Malvern	£ 0.1	£ -	£ -	£ 0.2	£ -	£ 0.4	£ -	£ 0.7
Cribbs Causeway	£ 0.2	£ 0.2	£ -	£ -	£ -	£ -	£ 0.1	£ 0.6
Birmingham	£ 0.3	£ 0.1	£ -	£ 0.1	£ -	£ -	£ -	£ 0.5
Abroad	£ 0.2	£ 0.2	£ 0.1	£ 0.2	£ 0.1	£ -	£ -	£ 0.8
OTHER	£ 1.1	£ 1.0	£ 0.2	£ 0.9	£ 0.2	£ 0.5	£ 0.9	£ 4.9

Source/Notes
(1) Market Share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Expenditure Per Head on First Choice and Second Choice Shopping location assumed to be on a 70:30 split.

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 7: Market Shares for Clothing, Footwear and Other Fashion Goods Spending in 2007 (Second Choice)

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL
Zone 1A - Hereford City								
Hereford Centre								
Hereford (including individual stores)	26.0%	23.4%	50.1%	28.4%	38.8%	24.2%	26.9%	26.9%
Sainsburys	0.7%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Tesco, Hereford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.2%
Outside Hereford Centre								
Hereford Retail Park	0.0%	0.6%	0.0%	1.3%	0.0%	0.0%	0.0%	0.4%
Salmon Retail Park	0.7%	0.0%	6.2%	0.0%	0.0%	0.0%	0.0%	0.4%
ASDA, Belmont Road	1.8%	1.3%	0.0%	1.3%	0.0%	0.0%	0.0%	1.0%
Tesco, Abbotsmead Road, Belmont	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Belmont Road Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Brook Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Zone 1B - Hereford Rural								
Zone 2 - Kington								
Kington Centre								
Kington	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
Zone 3 - Leominster								
Leominster Centre								
Leominster	0.0%	3.6%	6.2%	15.5%	0.0%	0.0%	0.0%	3.0%
Outside Leominster Centre								
Morrisons, Leominster	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.2%
Zone 4 - Bromyard								
Bromyard Centre								
Bromyard	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.2%
Zone 5 - Ledbury								
Ledbury Centre								
Ledbury	0.7%	0.6%	0.0%	0.0%	0.0%	7.5%	0.0%	1.2%
Outside Ledbury Centre								
Tesco, Ledbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 6 - Ross-on-Wye								
Ross on Wye Centre								
Ross on Wye	1.1%	6.0%	0.0%	0.0%	0.0%	0.0%	11.7%	3.6%
Gloucester Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside Ross on Wye Centre								
Ross Labels	2.2%	0.6%	0.0%	0.0%	0.0%	0.0%	2.3%	1.2%
Non Zone								
Cheltenham	12.3%	12.6%	0.0%	2.6%	3.0%	19.6%	17.5%	11.8%
Worcester	19.5%	8.9%	6.2%	10.4%	20.9%	22.6%	1.1%	13.0%
Gloucester	3.9%	1.3%	0.0%	2.6%	6.0%	18.2%	16.2%	6.2%
Cardiff	7.7%	8.3%	0.0%	3.8%	0.0%	0.0%	3.4%	5.4%
Bristol	3.9%	2.3%	0.0%	0.0%	3.0%	1.6%	4.7%	2.8%
Birmingham	3.3%	1.3%	0.0%	3.1%	0.0%	3.0%	0.0%	1.8%
Abergavenny	1.1%	4.9%	0.0%	0.0%	0.0%	0.0%	2.3%	2.0%
Monmouth	0.7%	1.3%	0.0%	1.3%	0.0%	0.0%	5.8%	1.4%
Cribbs Causeway	2.2%	3.0%	0.0%	1.3%	0.0%	0.0%	0.0%	1.6%
Ludlow	0.7%	0.6%	0.0%	9.1%	3.0%		0.0%	1.6%
Malvern Retail Park (Matalan)	0.7%	0.6%	12.6%	0.0%	0.0%	0.0%	0.0%	1.4%
Central London	1.1%	2.3%	6.2%	0.0%	0.0%	1.6%	0.0%	1.2%
Shrewsbury	0.7%	0.0%	0.0%	6.4%	0.0%	0.0%	0.0%	1.0%
Abroad	1.1%	0.6%	0.0%	0.0%	6.0%	1.6%	0.0%	1.0%
Hay-on-Wye	0.7%	3.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
OTHER	7.7%	10.9%	12.4%	11.8%	16.4%	0.0%	6.9%	7.4%

Source/Notes

(1) Market Share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).

(2) Figures have been adjusted to compensate for respondents who answered "don't buy".

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Comparison Analysis

Table Comparison 8: Turnover of Facilities from Market Shares of Clothing, Footwear and Other Fashion Goods Spending in 2007 (Second Choice)

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL
Population 2007	60,086	41,221	4,835	20,469	7,120	15,466	20,900	170,096
Expenditure per Capita in 2007	£ 202	£ 214	£ 201	£ 203	£ 204	£ 212	£ 217	
Total Available Expenditure in 2007 (£m)	£ 12.2	£ 8.8	£ 1.0	£ 4.2	£ 1.4	£ 3.3	£ 4.5	£ 35.4
Zone 1A - Hereford City								
Hereford Centre								
Hereford (including individual stores)	£ 3.2	£ 2.1	£ 0.5	£ 1.2	£ 0.6	£ 0.8	£ 1.2	£ 9.5
Sainsburys	£ 0.1	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1
Tesco, Hereford	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.0	£ 0.0
Outside Hereford Centre								
Hereford Retail Park	£ -	£ 0.1	£ -	£ 0.1	£ -	£ -	£ -	£ 0.1
Salmon Retail Park	£ 0.1	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ 0.1
ASDA, Belmont Road	£ 0.2	£ 0.1	£ -	£ 0.1	£ -	£ -	£ -	£ 0.4
Tesco, Abbotsmead Road, Belmont	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
Belmont Road Park	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
Brook Retail Park	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
Zone 1B - Hereford Rural								
Zone 2 - Kington								
Kington Centre								
Kington	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.1
Zone 3 - Leominster								
Leominster Centre								
Leominster	£ -	£ 0.3	£ 0.1	£ 0.6	£ -	£ -	£ -	£ 1.0
Outside Leominster Centre								
Morrisons, Leominster	£ -	£ -	£ -	£ 0.1	£ -	£ -	£ -	£ 0.1
Zone 4 - Bromyard								
Bromyard Centre								
Bromyard	£ -	£ -	£ -	£ -	£ 0.0	£ -	£ -	£ 0.0
Zone 5 - Ledbury								
Ledbury Centre								
Ledbury	£ 0.1	£ 0.1	£ -	£ -	£ -	£ 0.2	£ -	£ 0.4
Outside Ledbury Centre								
Tesco, Ledbury	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
Zone 6 - Ross-on-Wye								
Ross on Wye Centre								
Ross on Wye	£ 0.1	£ 0.5	£ -	£ -	£ -	£ -	£ 0.5	£ 1.2
Gloucester Road	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
Outside Ross on Wye Centre								
Ross Labels	£ 0.3	£ 0.1	£ -	£ -	£ -	£ -	£ 0.1	£ 0.4
Non Zone								
Cheltenham	£ 1.5	£ 1.1	£ -	£ 0.1	£ 0.0	£ 0.6	£ 0.8	£ 4.2
Worcester	£ 2.4	£ 0.8	£ 0.1	£ 0.4	£ 0.3	£ 0.7	£ 0.0	£ 4.7
Gloucester	£ 0.5	£ 0.1	£ -	£ 0.1	£ 0.1	£ 0.6	£ 0.7	£ 2.1
Cardiff	£ 0.9	£ 0.7	£ -	£ 0.2	£ -	£ -	£ 0.2	£ 2.0
Bristol	£ 0.5	£ 0.2	£ -	£ -	£ 0.0	£ 0.1	£ 0.2	£ 1.0
Birmingham	£ 0.4	£ 0.1	£ -	£ 0.1	£ -	£ 0.1	£ -	£ 0.7
Abergavenny	£ 0.1	£ 0.4	£ -	£ -	£ -		£ 0.1	£ 0.7
Monmouth	£ 0.1	£ 0.1	£ -	£ 0.1	£ -	£ -	£ 0.3	£ 0.5
Cribbs Causeway	£ 0.3	£ 0.3	£ -	£ 0.1	£ -	£ -	£ -	£ 0.6
Ludlow	£ 0.1	£ 0.1	£ -	£ 0.4	£ 0.0	£ -	£ -	£ 0.6
Malvern Retail Park (Matalan)	£ 0.1	£ 0.1	£ 0.1	£ -	£ -	£ -	£ -	£ 0.3
Central London	£ 0.1	£ 0.2	£ 0.1	£ -	£ -	£ 0.1	£ -	£ 0.5
Shrewsbury	£ 0.1	£ -	£ -	£ 0.3	£ -	£ -	£ -	£ 0.3
Abroad	£ 0.1	£ 0.1	£ -	£ -	£ 0.1	£ 0.1	£ -	£ 0.3
Hay-on-Wye	£ 0.1	£ 0.3	£ -	£ -	£ -	£ -	£ -	£ 0.3
OTHER	£ 0.9	£ 1.3	£ 1.5	£ 1.4	£ 2.0	£ -	£ 0.8	£ 8.0

Source/Notes

(1) Market Share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).

(2) Expenditure Per Head on First Choice and Second Choice Shopping location assumed to be on a 70:30 split.

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 9: Market Shares for Furniture, Floor Coverings, and Other Household Textiles Spending in 2007 (Most Money Spent)

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL
Zone 1A - Hereford City								
Hereford Centre								
Hereford	62.1%	66.8%	41.9%	44.6%	42.1%	20.6%	22.5%	50.7%
Outside Hereford Centre								
Dunelm, Holmer Road	2.8%	0.5%	0.0%	3.2%	0.0%	0.0%	1.4%	1.6%
Three Elm Road, Hereford	1.5%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
Floors 2 Go, Mortimor Road	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.3%
Harveys, Newton Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.3%
The Pine Factory, Foley Trading Estate	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
White Hall Fabric, White Hall Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.3%
Hereford Retail Park	17.2%	10.8%	14.1%	12.9%	10.6%	3.5%	11.8%	12.4%
Salmon Retail Park	2.1%	0.5%	7.0%	0.0%	0.0%	0.0%	0.0%	1.3%
B& Q, Holmer Road	3.8%	4.3%	7.0%	1.5%	0.0%	1.8%	0.0%	2.9%
Tesco, Abbotsmead	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Zone 1B - Hereford Rural								
Zone 2 - Kington								
Kington Centre								
Kington	0.0%	0.0%	14.1%	0.0%	0.0%	0.0%	0.0%	0.3%
Zone 3 - Leominster								
Leominster Centre								
Leominster	0.0%	1.4%	7.0%	32.0%	5.3%	1.8%	0.0%	4.5%
Focus, Leominster	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.3%
Zone 4 - Bromyard								
Bromyard Centre								
Bromyard	0.0%	0.0%	0.0%	0.0%	26.2%	0.0%	0.0%	0.8%
Zone 5 - Ledbury								
Ledbury Centre								
Ledbury	0.0%	0.0%	0.0%	0.0%	5.3%	32.3%	0.0%	3.4%
Outside Ledbury Centre								
Homebase, Ledbury	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.3%
Crystal Warehouse, Ledbury	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.3%
Zone 6 - Ross-on-Wye								
Ross on Wye Centre								
Ross on Wye	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%	26.8%	3.4%
Outside Ross on Wye Centre								
Ross Labels	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.3%
Elsewhere								
Wormelow Home & Garden	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Non Zone								
Cheltenham	1.5%	3.2%	0.0%	1.5%	0.0%	10.8%	4.4%	3.2%
Worcester	0.0%	0.5%	0.0%	0.0%	5.3%	7.3%	0.0%	1.1%
Gloucester	0.0%	1.4%	0.0%	0.0%	0.0%	5.5%	16.2%	2.9%
Cardiff	0.5%	1.9%	7.0%	1.5%	0.0%	0.0%	3.0%	1.6%
Bristol	1.5%	1.4%	0.0%	0.0%	0.0%	5.5%	0.0%	1.3%
OTHER	4.9%	4.9%	1.8%	1.5%	5.3%	7.5%	9.9%	5.3%

Source/Notes
(1) Market Share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Figures have been adjusted to compensate for respondents who answered "don't buy".

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 10: Turnover of Facilities from Market Shares of Furniture, Floor Coverings, and Other Household Textiles Spending in 2007 (Most Money Spent)

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL
Population 2007	60,086	41,221	4,835	20,469	7,120	15,466	20,900	170,096
Expenditure per Capita in 2007	£ 425	£ 713	£ 644	£ 651	£ 652	£ 678	£ 697	
Total Available Expenditure in 2007 (£m)	£ 25.5	£ 29.4	£ 3.1	£ 13.3	£ 4.6	£ 10.5	£ 14.6	101.09
Zone 1A - Hereford City								
Hereford Centre								
Hereford	£ 15.9	£ 19.6	£ 1.3	£ 5.9	£ 2.0	£ 2.2	£ 3.3	£ 50.1
Outside Hereford Centre								
Dunelm, Holmer Road	£ 0.7	£ 0.2	£ -	£ 0.4	£ -	£ -	£ 0.2	£ 1.5
Three Elm Road, Hereford	£ 0.4	£ 0.4	£ -	£ -	£ -	£ -	£ -	£ 0.8
Floors 2 Go, Mortimor Road	£ -	£ -	£ -	£ -	£ -	£ 0.2	£ -	£ 0.2
Harveys, Newton Road	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.2	£ 0.2
The Pine Factory, Foley Trading Estate	£ -	£ 0.2	£ -	£ -	£ -	£ -	£ -	£ 0.2
White Hall Fabric, White Hall Road	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.2	£ 0.2
Hereford Retail Park	£ 4.4	£ 3.2	£ 0.4	£ 1.7	£ 0.5	£ 0.4	£ 1.7	£ 12.3
Salmon Retail Park	£ 0.5	£ 0.2	£ 0.2	£ -	£ -	£ -	£ -	£ 0.9
B& Q, Holmer Road	£ 1.0	£ 1.3	£ 0.2	£ 0.2	£ -	£ 0.2	£ -	£ 2.9
Tesco, Abbotsmead	£ 0.3	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.3
Zone 1B - Hereford Rural								
Zone 2 - Kington								
Kington Centre								
Kington	£ -	£ -	£ 0.4	£ -	£ -	£ -	£ -	£ 0.4
Zone 3 - Leominster								
Leominster Centre								
Leominster	£ -	£ 0.4	£ 0.2	£ 4.3	£ 0.2	£ 0.2	£ -	£ 5.3
Focus, Leominster	£ -	£ -	£ -	£ 0.2	£ -	£ -	£ -	£ 0.2
Zone 4 - Bromyard								
Bromyard Centre								
Bromyard	£ -	£ -	£ -	£ -	£ 1.2	£ -	£ -	£ 1.2
Zone 5 - Ledbury								
Ledbury Centre								
Ledbury	£ -	£ -	£ -	£ -	£ 0.2	£ 3.4	£ -	£ 3.6
Outside Ledbury Centre								
Homebase, Ledbury	£ -	£ -	£ -	£ -	£ -	£ 0.2	£ -	£ 0.2
Crystal Warehouse, Ledbury	£ -	£ -	£ -	£ -	£ -	£ 0.2	£ -	£ 0.2
Zone 6 - Ross-on-Wye								
Ross on Wye Centre								
Ross on Wye	£ -	£ 0.2	£ -	£ -	£ -	£ -	£ 3.9	£ 4.1
Outside Ross on Wye Centre								
Ross Labels	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.2	£ 0.2
Elsewhere								
Wormelow Home & Garden	£ 0.3	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.3
Non Zone								
Cheltenham	£ 0.4	£ 1.0	£ -	£ 0.2	£ -	£ 1.1	£ 0.6	£ 3.3
Worcester	£ -	£ 0.2	£ -	£ -	£ 0.2	£ 0.8	£ -	£ 1.2
Gloucester	£ -	£ 0.4	£ -	£ -	£ -	£ 0.6	£ 2.4	£ 3.3
Cardiff	£ 0.1	£ 0.6	£ 0.2	£ 0.2	£ -	£ -	£ 0.4	£ 1.5
Bristol	£ 0.4	£ 0.4	£ -	£ -	£ -	£ 0.6	£ -	£ 1.4
OTHER	£ 1.2	£ 1.4	£ 0.1	£ 0.2	£ 0.2	£ 0.8	£ 1.4	£ 5.4

<u>Source/Notes</u>
(1) Market Share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Figures have been adjusted to compensate for respondents who answered "don't buy".

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 11: Market Shares for DIY and Decorating Supplies Spending in 2007 (Most Money Spent)

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL
Zone 1A - Hereford City								
Hereford Centre								
Hereford	24.8%	25.4%	18.7%	9.6%	20.9%	0.0%	4.9%	17.8%
Aldi, Whitecross Road	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Outside Hereford Centre								
Hereford	24.5%	25.4%	18.7%	9.6%	20.9%	0.0%	4.9%	17.7%
Rockfield DIY, Station Approach	4.5%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
Homebase, Three Elm Road	3.0%	2.7%	5.4%	0.8%	0.0%	0.0%	0.0%	2.0%
Jewson Tool Hire, Canal Wharf	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Whitehall Fabric	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.2%
Belmont Road Park	0.6%	0.0%	5.4%	0.0%	0.0%	0.0%	0.0%	0.3%
Hereford Retail Park	15.6%	16.8%	5.4%	7.4%	6.0%	2.4%	4.8%	11.7%
Salmon Retail Park	1.4%	0.3%	5.4%	0.0%	0.0%	0.0%	0.0%	0.7%
B& Q, Holmer Road	20.9%	16.8%	10.8%	6.4%	6.0%	6.1%	0.9%	13.2%
Brook Retail Park	0.6%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Zone 1B - Hereford Rural								
Zone 2 - Kington								
Kington Centre								
Kington	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Outside Kington Centre								
KBS, Kington	0.0%	0.3%	5.4%	0.0%	0.0%	0.0%	0.0%	0.3%
Zone 3 - Leominster								
Leominster Centre								
Leominster	0.0%	3.5%	5.4%	58.7%	0.0%	0.0%	0.0%	8.1%
Focus, Leominster	0.0%	0.3%	10.8%	7.4%	0.0%	0.0%	0.0%	1.2%
Aldi, Leominster	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.2%
Zone 4 - Bromyard								
Bromyard Centre								
Bromyard	0.0%	0.8%	0.0%	0.0%	11.9%	0.0%	0.0%	0.7%
Co-op, Bromyard	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%	0.0%	0.2%
Zone 5 - Ledbury								
Ledbury Centre								
Ledbury	0.0%	0.0%	0.0%	0.0%	3.0%	52.6%	0.0%	4.8%
Outside Ledbury Centre								
Rowley Plastics, Lower Road Trading Estate	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.2%
Homebase, Ledbury	0.0%	0.0%	0.0%	0.0%	6.0%	26.0%	6.1%	3.0%
Zone 6 - Ross-on-Wye								
Ross on Wye Centre								
Ross on Wye	0.0%	2.7%	0.0%	0.0%	0.0%	0.0%	54.8%	6.9%
Outside Ross on Wye Centre								
Focus, Ross on Wye	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.8%	1.0%
Bradford Building Suplies, Alton St, Ross on Wye	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	0.2%
Non Zone								
Worcester	0.0%	0.0%	0.0%	0.0%	11.9%	1.2%	0.0%	0.5%
Gloucester	0.3%	0.0%	0.0%	0.0%	3.0%	2.4%	4.8%	1.0%
Abergavenny	0.0%	1.5%	5.4%	0.0%	0.0%	0.0%	0.0%	0.5%
OTHER	3.0%	1.0%	3.4%	0.0%	4.2%	8.2%	8.1%	5.4%

Source/Notes
(1) Market Share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Figures have been adjusted to compensate for respondents who answered "don't buy".

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 12: Turnover of Facilities from Market Shares of DIY & Decorating Supplies Spending in 2007 (Most Money Spent)

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL
Population 2007	60,086	41,221	4,835	20,469	7,120	15,466	20,900	170,096
Expenditure per Capita in 2007	£ 225	£ 305	£ 284	£ 274	£ 273	£ 286	£ 288	
Total Available Expenditure in 2007(£m)	£ 13.5	£ 12.6	£ 1.4	£ 5.6	£ 1.9	£ 4.4	£ 6.0	£ 45.5
Zone 1A - Hereford City								
Hereford Centre								
Hereford	£ 3.4	£ 3.2	£ 0.3	£ 0.5	£ 0.4	£ -	£ 0.3	£ 8.1
Aldi, Whitecross Road	£ 0.0	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.0
Outside Hereford Centre								
Hereford	£ 3.3	£ 3.2	£ 0.3	£ 0.5	£ 0.4	£ -	£ 0.3	£ 8.0
Rockfield DIY, Station Approach	£ 0.6	£ 0.3	£ -	£ -	£ -	£ -	£ -	£ 0.9
Homebase, Three Elm Road	£ 0.4	£ 0.3	£ 0.1	£ 0.0	£ -	£ -	£ -	£ 0.9
Jewson Tool Hire, Canal Wharf	£ 0.0	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.0
Whitehall Fabric	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ 0.1
Belmont Road Park	£ 0.1	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ 0.2
Hereford Retail Park	£ 2.1	£ 2.1	£ 0.1	£ 0.4	£ 0.1	£ 0.1	£ 0.3	£ 5.2
Salmon Retail Park	£ 0.2	£ 0.0	£ 0.1	£ -	£ -	£ -	£ -	£ 0.3
B& Q, Holmer Road	£ 2.8	£ 2.1	£ 0.1	£ 0.4	£ 0.1	£ 0.3	£ 0.1	£ 5.9
Brook Retail Park	£ 0.1	£ 0.0	£ -	£ -	£ -	£ -	£ -	£ 0.1
Zone 1B - Hereford Rural								
Zone 2 - Kington								
Kington Centre								
Kington	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
Outside Kington Centre								
KBS, Kington	£ -	£ 0.0	£ 0.1	£ -	£ -	£ -	£ -	£ 0.1
Zone 3 - Leominster								
Leominster Centre								
Leominster	£ -	£ 0.4	£ 0.1	£ 3.3	£ -	£ -	£ -	£ 3.8
Focus, Leominster	£ -	£ 0.0	£ 0.1	£ 0.4	£ -	£ -	£ -	£ 0.6
Aldi, Leominster	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ -	£ 0.1
Zone 4 - Bromyard								
Bromyard Centre								
Bromyard	£ -	£ 0.1	£ -	£ -	£ 0.2	£ -	£ -	£ 0.3
Co-op, Bromyard	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ -	£ 0.1
Zone 5 - Ledbury								
Ledbury Centre								
Ledbury	£ -	£ -	£ -	£ -	£ 0.1	£ 2.3	£ -	£ 2.4
Outside Ledbury Centre								
Rowley Plastics, Lower Road Trading Estate	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ 0.1
Homebase, Ledbury	£ -	£ -	£ -	£ -	£ 0.1	£ 1.2	£ 0.4	£ 1.6
Zone 6 - Ross-on-Wye								
Ross on Wye Centre								
Ross on Wye	£ -	£ 0.3	£ -	£ -	£ -	£ -	£ 3.3	£ 3.6
Outside Ross on Wye Centre								
Focus, Ross on Wye	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.5	£ 0.5
Bradford Building Suplies, Alton St, Ross on Wye	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ 0.1
Non Zone								
Worcester	£ -	£ -	£ -	£ -	£ 0.2	£ 0.1	£ -	£ 0.3
Gloucester	£ 0.0	£ -	£ -	£ -	£ 0.1	£ 0.1	£ 0.3	£ 0.5
Abergavenny	£ -	£ 0.2	£ 0.1	£ -	£ -	£ -	£ -	£ 0.3
OTHER	£ 0.4	£ 0.1	£ 0.0	£ -	£ 0.1	£ 0.4	£ 0.5	£ 1.5

Source/Notes
(1) Market Share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Figures have been adjusted to compensate for respondents who answered "don't buy".

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 13: Market Shares for Electrical and Domestic Appliances Spending in 2007 (Most Money Spent)

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL
Zone 1A - Hereford City								
Hereford Centre								
Hereford	31.1%	27.1%	24.9%	20.2%	23.7%	7.3%	12.6%	24.7%
Sainsburys, Hereford	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Morrisons, Hereford	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Outside Hereford Centre								
Hereford	28.8%	24.2%	24.9%	18.9%	23.7%	7.3%	12.6%	22.3%
Westfields Trading Estate	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Comet, Holmer Road	7.4%	5.8%	5.0%	8.4%	0.0%	0.0%	0.0%	5.2%
Currys, Holmer Road	0.5%	1.1%	0.0%	2.8%	0.0%	0.0%	3.5%	1.2%
ASDA, Belmont Road	0.5%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Hereford Retail Park	24.5%	29.2%	10.0%	22.2%	26.5%	16.4%	7.0%	22.5%
Salmon Retail Park	0.0%	0.4%	5.0%	0.0%	0.0%	0.0%	0.0%	0.2%
B& Q, Holmer Road	0.5%	2.7%	5.0%	1.3%	0.0%	0.0%	0.0%	1.2%
Tesco, Abbotsmead	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Belmont Road Park	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Brook Retail Park	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Zone 1B - Hereford Rural								
Zone 2 - Kington								
Kington Centre								
Kington	0.0%	0.4%	10.0%	1.3%	0.0%	0.0%	0.0%	0.7%
Co-op, High Street, Kington	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Tom Bounds, High Street	0.0%	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Zone 3 - Leominster								
Leominster Centre								
Leominster	0.0%	1.6%	5.0%	25.0%	0.0%	0.0%	0.0%	3.5%
Zone 4 - Bromyard								
Bromyard Centre								
Bromyard	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 5 - Ledbury								
Ledbury Centre								
Ledbury	0.0%	0.4%	0.0%	0.0%	0.0%	43.7%	0.0%	4.0%
Outside Ledbury Centre								
Homebase, Ledbury	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.2%
Zone 6 - Ross-on-Wye								
Ross on Wye Centre								
Ross on Wye	0.9%	2.7%	0.0%	0.0%	0.0%	0.0%	36.9%	5.9%
Outside Ross on Wye Centre								
Ross Labels	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.2%
Non Zone								
Cheltenham	0.0%	1.1%	0.0%	0.0%	0.0%	7.3%	1.1%	1.2%
Worcester	0.0%	0.4%	0.0%	0.0%	26.2%	1.8%	0.0%	1.2%
Gloucester	0.5%	0.4%	0.0%	0.0%	0.0%	10.9%	17.0%	3.5%
Cribbs Causeway	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	2.4%	0.5%
OTHER	0.5%	1.3%	0.0%	0.0%	0.0%	3.5%	4.6%	1.7%

Source/Notes
(1) Market Share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Figures have been adjusted to compensate for respondents who answered "don't buy".

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 13: Market Shares for Electrical and Domestic Appliances Spending in 2007 (Most Money Spent)

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL
Zone 1A - Hereford City								
Hereford Centre								
Hereford	31.1%	27.1%	24.9%	20.2%	23.7%	7.3%	12.6%	24.7%
Sainsburys, Hereford	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Morrisons, Hereford	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Outside Hereford Centre								
Hereford	28.8%	24.2%	24.9%	18.9%	23.7%	7.3%	12.6%	22.3%
Westfields Trading Estate	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Comet, Holmer Road	7.4%	5.8%	5.0%	8.4%	0.0%	0.0%	0.0%	5.2%
Currys, Holmer Road	0.5%	1.1%	0.0%	2.8%	0.0%	0.0%	3.5%	1.2%
ASDA, Belmont Road	0.5%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Hereford Retail Park	24.5%	29.2%	10.0%	22.2%	26.5%	16.4%	7.0%	22.5%
Salmon Retail Park	0.0%	0.4%	5.0%	0.0%	0.0%	0.0%	0.0%	0.2%
B& Q, Holmer Road	0.5%	2.7%	5.0%	1.3%	0.0%	0.0%	0.0%	1.2%
Tesco, Abbotsmead	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Belmont Road Park	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Brook Retail Park	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Zone 1B - Hereford Rural								
Zone 2 - Kington								
Kington Centre								
Kington	0.0%	0.4%	10.0%	1.3%	0.0%	0.0%	0.0%	0.7%
Co-op, High Street, Kington	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Tom Bounds, High Street	0.0%	0.0%	10.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Zone 3 - Leominster								
Leominster Centre								
Leominster	0.0%	1.6%	5.0%	25.0%	0.0%	0.0%	0.0%	3.5%
Zone 4 - Bromyard								
Bromyard Centre								
Bromyard	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 5 - Ledbury								
Ledbury Centre								
Ledbury	0.0%	0.4%	0.0%	0.0%	0.0%	43.7%	0.0%	4.0%
Outside Ledbury Centre								
Homebase, Ledbury	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	0.2%
Zone 6 - Ross-on-Wye								
Ross on Wye Centre								
Ross on Wye	0.9%	2.7%	0.0%	0.0%	0.0%	0.0%	36.9%	5.9%
Outside Ross on Wye Centre								
Ross Labels	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	0.2%
Non Zone								
Cheltenham	0.0%	1.1%	0.0%	0.0%	0.0%	7.3%	1.1%	1.2%
Worcester	0.0%	0.4%	0.0%	0.0%	26.2%	1.8%	0.0%	1.2%
Gloucester	0.5%	0.4%	0.0%	0.0%	0.0%	10.9%	17.0%	3.5%
Cribbs Causeway	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	2.4%	0.5%
OTHER	0.5%	1.3%	0.0%	0.0%	0.0%	3.5%	4.6%	1.7%

Source/Notes
(1) Market Share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Figures have been adjusted to compensate for respondents who answered "don't buy".

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 14: Turnover of Facilities from Market Shares of Electrical and Domestic Goods Spending in 2007
(Most Money Spent)

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL
Population 2007	60,086	41,221	4,835	20,469	7,120	15,466	20,900	170,096
Expenditure per Capita in 2007	£ 334	£ 363	£ 347	£ 348	£ 349	£ 358	£ 356	
Total Available Expenditure in 2007 (£m)	£ 20.0	£ 15.0	£ 1.7	£ 7.1	£ 2.5	£ 5.5	£ 7.4	£ 59.3
Zone 1A - Hereford City								
Hereford Centre								
Hereford	£ 6.2	£ 4.1	£ 0.4	£ 1.4	£ 0.6	£ 0.4	£ 0.9	£ 14.1
Sainsburys, Hereford	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.1
Morrisons, Hereford	£ 0.2	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.2
Outside Hereford Centre								
Hereford	£ 5.8	£ 3.6	£ 0.4	£ 1.3	£ 0.6	£ 0.4	£ 0.9	£ 13.1
Westfields Trading Estate	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.1
Comet, Holmer Road	£ 1.5	£ 0.9	£ 0.1	£ 0.6	£ -	£ -	£ -	£ 3.0
Currys, Holmer Road	£ 0.1	£ 0.2	£ -	£ 0.2	£ -	£ -	£ 0.3	£ 0.7
ASDA, Belmont Road	£ 0.1	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.2
Hereford Retail Park	£ 4.9	£ 4.4	£ 0.2	£ 1.6	£ 0.7	£ 0.9	£ 0.5	£ 13.1
Salmon Retail Park	£ -	£ 0.1	£ 0.1	£ -	£ -	£ -	£ -	£ 0.2
B& Q, Holmer Road	£ 0.1	£ 0.4	£ 0.1	£ 0.1	£ -	£ -	£ -	£ 0.7
Tesco, Abbotsmead	£ 0.3	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.3
Belmont Road Park	£ 0.2	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.2
Brook Retail Park	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.1
Zone 1B - Hereford Rural								
Zone 2 - Kington								
Kington Centre								
Kington	£ -	£ 0.1	£ 0.2	£ 0.1	£ -	£ -	£ -	£ 0.3
Co-op, High Street, Kington	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.1
Tom Bounds, High Street	£ -	£ -	£ 0.2	£ -	£ -	£ -	£ -	£ 0.2
Zone 3 - Leominster								
Leominster Centre								
Leominster	£ -	£ 0.2	£ 0.1	£ 1.8	£ -	£ -	£ -	£ 2.1
Zone 4 - Bromyard								
Bromyard Centre								
Bromyard	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
Zone 5 - Ledbury								
Ledbury Centre								
Ledbury	£ -	£ 0.1	£ -	£ -	£ -	£ 2.4	£ -	£ 2.5
Outside Ledbury Centre								
Homebase, Ledbury	£ -	£ -	£ -	£ -	£ -	£ 0.1	£ -	£ 0.1
Zone 6 - Ross-on-Wye								
Ross on Wye Centre								
Ross on Wye	£ 0.2	£ 0.4	£ -	£ -	£ -	£ -	£ 2.7	£ 3.3
Outside Ross on Wye Centre								
Ross Labels	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.2	£ 0.2
Non Zone								
Cheltenham	£ -	£ 0.2	£ -	£ -	£ -	£ 0.4	£ 0.1	£ 0.7
Worcester	£ -	£ 0.1	£ -	£ -	£ 0.7	£ 0.1	£ -	£ 0.8
Gloucester	£ 0.1	£ 0.1	£ -	£ -	£ -	£ 0.6	£ 1.3	£ 2.0
Cribbs Causeway	£ -	£ 0.1	£ -	£ -	£ -		£ 0.2	£ 0.2
OTHER	£ 0.1	£ 0.2	£ -	£ -	£ -	£ 0.2	£ 0.3	£ 0.8

Source/Notes
(1) Market Share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Figures have been adjusted to compensate for respondents who answered "don't buy".

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 15: Market Shares for Personal and Luxury Goods Spending in 2007 (Most Money Spent)

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL
Zone 1A - Hereford City								
Hereford Centre								
Hereford	87.8%	82.7%	66.7%	48.6%	50.0%	21.8%	17.3%	69.8%
Sainsburys, Hereford	0.4%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
Outside Hereford Centre								
Dunelm Holmer Road	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
ASDA, Belmont Road	1.3%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.5%
Hereford Retail Park	0.0%	0.4%	0.0%	1.0%	0.0%	0.0%	0.0%	0.2%
Tesco, Abbotsmead	1.7%	1.9%	0.0%	0.0%	0.0%	0.0%	1.1%	1.0%
Zone 1B - Hereford Rural								
Zone 2 - Kington								
Kington Centre								
Kington	0.0%	0.0%	14.2%	1.0%	0.0%	0.0%	0.0%	0.5%
Zone 3 - Leominster								
Leominster Centre								
Leominster	0.0%	1.4%	9.6%	42.6%	0.0%	0.0%	0.0%	5.1%
Outside Leominster Centre								
Morrisons, Leominster	0.0%	0.0%	4.8%	0.0%	0.0%	0.0%	0.0%	0.2%
Zone 4 - Bromyard								
Bromyard Centre								
Bromyard	0.0%	0.0%	0.0%	0.0%	11.6%	0.0%	0.0%	0.3%
Co-op, Bromyard	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.2%
Zone 5 - Ledbury								
Ledbury Centre								
Ledbury	1.3%	1.4%	0.0%	0.0%	0.0%	42.1%	1.1%	4.1%
Zone 6 - Ross-on-Wye								
Ross on Wye Centre								
Ross on Wye	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	48.4%	5.1%
Outside Ross on Wye Centre								
Overross	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Non Zone								
Cheltenham	0.0%	0.4%	0.0%	0.0%	0.0%	13.1%	4.6%	1.5%
Worcester	0.9%	1.0%	0.0%	0.0%	26.8%	5.8%	2.3%	1.9%
Gloucester	0.0%	0.0%	0.0%	0.0%	0.0%	7.3%	11.4%	1.7%
Bristol	1.3%	0.4%	0.0%	0.0%	0.0%	1.4%	1.1%	0.7%
Birmingham	0.9%	0.4%	0.0%	1.0%	0.0%	1.4%	0.0%	0.5%
Hay-on-Wye	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	1.1%	0.5%
Monmouth	0.0%	1.4%	0.0%	0.0%	0.0%	1.4%	1.1%	0.5%
Abergavenny	0.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
OTHER	3.5%	2.9%	4.8%	4.9%	11.6%	4.2%	10.7%	4.3%

Source/Notes
(1) Market Share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Figures have been adjusted to compensate for respondents who answered "don't buy".

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 16: Turnover of Facilities from Market Shares of Personal & Luxury Goods Spending in 2007 (Most Money Spent)

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL
Population 2007	60,086	41,221	4,835	20,469	7,120	15,466	20,900	170,096
Expenditure per Capita in 2007	£ 1,245	£ 1,397	£ 1,348	£ 1,348	£ 1,342	£ 1,401	£ 1,390	
Total Available Expenditure in 2007 (£m)	£ 74.8	£ 57.6	£ 6.5	£ 27.6	£ 9.6	£ 21.7	£ 29.0	£ 226.8
Zone 1A - Hereford City								
Hereford Centre								
Hereford	£ 65.7	£ 47.6	£ 4.3	£ 13.4	£ 4.8	£ 4.7	£ 5.0	£ 145.5
Sainsburys, Hereford	£ 0.3	£ 0.8	£ -	£ -	£ -	£ -	£ -	£ 1.1
Outside Hereford Centre								
Dunelm Holmer Road	£ 0.3	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.3
ASDA, Belmont Road	£ 1.0	£ -	£ -	£ 0.3	£ -	£ -	£ -	£ 1.2
Hereford Retail Park	£ -	£ 0.2	£ -	£ 0.3	£ -	£ -	£ -	£ 0.5
Tesco, Abbotsmead	£ 1.3	£ 1.1	£ -	£ -	£ -	£ -	£ 0.3	£ 2.7
Zone 1B - Hereford Rural								
Zone 2 - Kington								
Kington Centre								
Kington	£ -	£ -	£ 0.9	£ 0.3	£ -	£ -	£ -	£ 1.2
Zone 3 - Leominster								
Leominster Centre								
Leominster	£ -	£ 0.8	£ 0.6	£ 11.8	£ -	£ -	£ -	£ 13.2
Outside Leominster Centre								
Morrisons, Leominster	£ -	£ -	£ 0.3	£ -	£ -	£ -	£ -	£ 0.3
Zone 4 - Bromyard								
Bromyard Centre								
Bromyard	£ -	£ -	£ -	£ -	£ 1.1	£ -	£ -	£ 1.1
Co-op, Bromyard	£ -	£ -	£ -	£ -	£ -	£ 0.3	£ -	£ 0.3
Zone 5 - Ledbury								
Ledbury Centre								
Ledbury	£ 1.0	£ 0.8	£ -	£ -	£ -	£ 9.1	£ 0.3	£ 11.2
Zone 6 - Ross-on-Wye								
Ross on Wye Centre								
Ross on Wye	£ -	£ 0.6	£ -	£ -	£ -	£ -	£ 14.1	£ 14.6
Outside Ross on Wye Centre								
Overross	£ 0.3	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.3
Non Zone								
Cheltenham	£ -	£ 0.2	£ -	£ -	£ -	£ 2.8	£ 1.3	£ 4.4
Worcester	£ 0.7	£ 0.6	£ -	£ -	£ 2.6	£ 1.3	£ 0.7	£ 5.7
Gloucester	£ -	£ -	£ -	£ -	£ -	£ 1.6	£ 3.3	£ 4.9
Bristol	£ 1.0	£ 0.2	£ -	£ -	£ -	£ 0.3	£ 0.3	£ 1.8
Birmingham	£ 0.7	£ 0.2	£ -	£ 0.3	£ -	£ 0.3	£ -	£ 1.5
Hay-on-Wye	£ -	£ 1.0	£ -	£ -	£ -	£ -	£ 0.3	£ 1.3
Monmouth	£ -	£ 0.8	£ -	£ -	£ -	£ 0.3	£ 0.3	£ 1.4
Abergavenny	£ -	£ 1.0	£ -	£ -	£ -	£ -	£ -	£ 1.0
OTHER	£ 2.6	£ 1.7	£ 0.3	£ 1.3	£ 1.1	£ 0.9	£ 3.1	£ 11.1

Source/Notes

(1) Market Share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).

(2) Figures have been adjusted to compensate for respondents who answered "don't buy".

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 17: Turnover of Facilities from Market Shares for All Comparison Goods Spending in 2007

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL	Inflow of Expenditure from outside Study Area (%)	Inflow of Expenditure (£m)	Total Turnover
Population 2007	60,086	41,221	4,835	20,469	7,120	15,466	20,900	170,096			
Expenditure per Capita in 2007	£ 2,712	£ 2,999	£ 2,864	£ 2,846	£ 2,835	£ 2,954	£ 2,968				
Total Available Expenditure in 2007 (£m)	£ 163.0	£ 123.6	£ 13.8	£ 58.3	£ 20.2	£ 45.7	£ 62.0	£ 486.6			
Zone 1A - Hereford City											
Hereford Centre											
Hereford (including individual stores)	£ 118.8	£ 93.7	£ 8.2	£ 30.2	£ 10.1	£ 10.8	£ 14.1	£ 286.0	17%	£ 48.6	£ 334.6
Aldi, Whitecross Road	£ 0.3	£ 0.8	£ 0.3	£ -	£ -	£ -	£ -	£ 1.2	17%	£ 0.2	£ 1.4
Sainsburys	£ 0.6	£ 1.0	£ -	£ -	£ -	£ -	£ -	£ 1.7	17%	£ 0.3	£ 1.9
Tesco, Hereford	£ 0.4	£ 0.2	£ -	£ -	£ -	£ -	£ 0.0	£ 0.7	17%	£ 0.1	£ 0.8
Morrisons, Hereford	£ 0.2	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.2	17%	£ 0.0	£ 0.2
Hereford Centre Total	***£ 120.4***	***£ 95.7***	***£ 8.5***	***£ 30.2***	***£ 10.1***	***£ 10.8***	***£ 14.1***	***£ 289.7***		***£ 49.2***	***£ 338.9***
Outside Hereford Centre											
Hereford	£ 9.1	£ 6.8	£ 0.7	£ 1.9	£ 1.0	£ 0.4	£ 1.2	£ 21.1	0%	£ -	£ 21.1
Hereford Retail Park	£ 11.6	£ 10.2	£ 0.7	£ 4.5	£ 1.3	£ 1.4	£ 2.9	£ 32.4	0%	£ -	£ 32.4
ASDA, Belmont Road	£ 1.6	£ 0.2	£ 0.1	£ 0.3	£ -	£ -	£ -	£ 2.1	5%	£ 0.1	£ 2.2
Tesco, Abbotsmead Road	£ 1.9	£ 1.1	£ -	£ -	£ -	£ -	£ 0.3	£ 3.3	5%	£ 0.2	£ 3.5
Salmon Retail Park	£ 2.6	£ 1.1	£ 0.5	£ 0.6	£ -	£ -	£ -	£ 4.9	0%	£ -	£ 4.9
Jewson Tool Hire, Canal Wharf	£ 0.0	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.0	0%	£ -	£ 0.0
Whitehall Fabric	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.3	£ 0.3	0%	£ -	£ 0.3
Rockfield DIY, Station Approach	£ 0.6	£ 0.3	£ -	£ -	£ -	£ -	£ -	£ 0.9	0%	£ -	£ 0.9
Homebase, Three Elm Road	£ 0.8	£ 0.7	£ 0.1	£ 0.0	£ -	£ -	£ -	£ 1.7	0%	£ -	£ 1.7
B& Q, Holmer Road	£ 3.9	£ 3.8	£ 0.5	£ 0.6	£ 0.1	£ 0.5	£ 0.1	£ 9.4	0%	£ -	£ 9.4
Westfields Trading Estate	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ -	£ 0.1	0%	£ -	£ 0.1
The Pine Factory, Foley Trading Estate	£ -	£ 0.2	£ -	£ -	£ -	£ -	£ -	£ 0.2	0%	£ -	£ 0.2
Belmont Road Park	£ 0.3	£ -	£ 0.1	£ -	£ -	£ -	£ -	£ 0.4	0%	£ -	£ 0.4
Brook Retail Park	£ 0.2	£ 0.1	£ -	£ -	£ -	£ -	£ -	£ 0.3	0%	£ -	£ 0.3
Outside Hereford Centre Total	***£ 32.7***	***£ 24.4***	***£ 2.5***	***£ 8.0***	***£ 2.4***	***£ 2.2***	***£ 4.7***	***£ 77.1***		***£ 0.3***	***£ 77.3***
Zone Total	**£ 153.1**	**£ 120.1**	**£ 11.1**	**£ 38.3**	**£ 12.5**	**£ 13.1**	**£ 18.8**	**£ 366.8**		**£ 49.5**	**£ 416.3**
Zone 1B - Hereford Rural											
Zone 2 - Kington											
Zone Total	**£ 0.1**	**£ 0.2**	**£ 1.3**	**£ 0.1**	**£ -**	**£ -**	**£ -**	**£ 1.7**		**£ 0.3**	**£ 2.0**
Zone 3 - Leominster											
Zone Total	**£ 0.1**	**£ 2.2**	**£ 1.5**	**£ 24.1**	**£ 0.3**	**£ 0.2**	**£ -**	**£ 28.4**		**£ 5.4**	**£ 33.8**
Zone 4 - Bromyard											
Zone Total	**£ 0.1**	**£ 0.1**	**£ -**	**£ -**	**£ 2.8**	**£ 0.4**	**£ -**	**£ 3.3**		**£ 0.7**	**£ 4.0**
Zone 5 - Ledbury											
Zone Total	**£ 1.1**	**£ 1.0**	**£ -**	**£ 0.1**	**£ 0.4**	**£ 20.0**	**£ 0.7**	**£ 23.3**		**£ 6.8**	**£ 30.1**
Zone 6 - Ross-on-Wye											
Zone Total	**£ 1.4**	**£ 2.4**	**£ -**	**£ -**	**£ -**	**£ 0.1**	**£ 28.1**	**£ 32.0**		**£ 21.5**	**£ 53.5**
Non Zone											
Non Zone Total	**£ 15.0**	**£ 16.4**	**£ 1.5**	**£ 5.1**	**£ 7.3**	**£ 19.6**	**£ 22.9**	**£ 85.5**		**£ -**	**£ 85.5**

Source/Notes
(1) Market share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Inflow of total turnover from outside of Study Area based on results of in centre surveys of Hereford City Centre and the market town centres undertaken by Research and Marketing (November 2007). Inflow for Ross Labels is allowed at some 1000% to account for the effects of tourist and other spend from outside the catchment. Inflows to significant facilities outside the market town centres, applied at circa 50% of the inflow to the centre.

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 18: Turnover of Facilities from Market Shares for All Comparsion Goods Spending in 2011

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL	Inflow of Expenditure (£m)	Total Turnover
Population 2011	62,466	41,803	4,937	21,387	7,321	15,848	21,402	175,164		
Expenditure per Capita in 2011	£ 2,781	£ 3,075	£ 2,937	£ 2,918	£ 2,907	£ 3,029	£ 3,043			
Total Available Expenditure in 2011 (£m)	£ 173.7	£ 128.6	£ 14.5	£ 62.4	£ 21.3	£ 48.0	£ 65.1	£ 513.6		
Zone 1A - Hereford City										
Hereford Centre										
Hereford Centre Total	***£ 128.4***	***£ 99.5***	***£ 8.9***	***£ 32.4***	***£ 10.7***	***£ 11.4***	***£ 14.8***	***£ 305.8***	***£ 52.0***	***£ 357.7***
Outside Hereford Centre										
Outside Hereford Centre Total	***£ 34.9***	***£ 25.4***	***£ 2.7***	***£ 8.6***	***£ 2.5***	***£ 2.4***	***£ 4.9***	***£ 81.3***	***£ 0.3***	***£ 81.6***
Zone Total	**£ 163.3**	**£ 124.9**	**£ 11.6**	**£ 41.0**	**£ 13.2**	**£ 13.8**	**£ 19.8**	**£ 387.1**	**£ 52.3**	**£ 439.4**
Zone 1B - Hereford Rural										
Zone 2 - Kington										
Zone Total	**£ 0.1**	**£ 0.2**	**£ 1.4**	**£ 0.1**	**£ -**	**£ -**	**£ -**	**£ 1.8**	**£ 0.3**	**£ 2.1**
Zone 3 - Leominster										
Zone Total	**£ 0.1**	**£ 2.3**	**£ 1.6**	**£ 25.8**	**£ 0.3**	**£ 0.3**	**£ -**	**£ 30.0**	**£ 5.7**	**£ 35.7**
Zone 4 - Bromyard										
Zone Total	**£ 0.1**	**£ 0.1**	**£ -**	**£ -**	**£ 3.0**	**£ 0.4**	**£ -**	**£ 3.5**	**£ 0.7**	**£ 4.3**
Zone 5 - Ledbury										
Zone Total	**£ 1.1**	**£ 1.1**	**£ -**	**£ 0.1**	**£ 0.4**	**£ 21.0**	**£ 0.8**	**£ 24.6**	**£ 7.2**	**£ 31.8**
Zone 6 - Ross-on-Wye										
Zone Total	**£ 1.5**	**£ 2.5**	**£ -**	**£ -**	**£ -**	**£ 0.1**	**£ 29.5**	**£ 33.8**	**£ 22.7**	**£ 56.4**
Non Zone										
Non Zone Total	**£ 6.8**	**£ 6.7**	**£ 0.1**	**£ 1.5**	**£ 5.6**	**£ 15.9**	**£ 15.3**	**£ 51.9**	**£ -**	**£ 51.9**

Source/Notes
(1) Market share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007).
(2) Inflow of total turnover from outside of Study Area based on results of in centre surveys of Hereford City Centre and the market town centres undertaken by Research and Marketing (November 2007). Inflow for Ross Labels is allowed at some 1000% to account for the effects of tourist and other spend from outside the catchment. Inflows to significant facilities outside the market town centres, applied at circa 50% of the inflow to the centre.

Herefordshire PPS4 Assessment
Comparison Analysis

Table Comparison 19: Turnover of Facilities from Market Shares for All Comparison Goods Spending in 2016

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL	Inflow of Expenditure (£m)	Total Turnover
Population 2016	**65,441**	**42,530**	**5,064**	**22,536**	**7,573**	**16,326**	**22,030**	**181,499**		
Expenditure per Capita in 2016	£ 3,105	£ 3,434	£ 3,280	£ 3,259	£ 3,246	£ 3,382	£ 3,398			
Total Available Expenditure in 2016 (£m)	£ 203.2	£ 146.0	£ 16.6	£ 73.4	£ 24.6	£ 55.2	£ 74.9	£ 593.9		
Zone 1A - Hereford City										
Hereford Centre										
Hereford Centre Total	***£ 150.2***	***£ 113.0***	***£ 10.2***	***£ 38.1***	***£ 12.3***	***£ 13.1***	***£ 17.1***	***£ 353.6***	***£ 60.1***	***£ 413.7***
Outside Hereford Centre										
Outside Hereford Centre Total	***£ 40.8***	***£ 28.9***	***£ 3.1***	***£ 10.1***	***£ 2.9***	***£ 2.7***	***£ 5.7***	***£ 94.1***	***£ 0.3***	***£ 94.4***
Zone Total	**£ 191.0**	**£ 141.9**	**£ 13.3**	**£ 48.2**	**£ 15.2**	**£ 15.8**	**£ 22.7**	**£ 447.7**	**£ 60.4**	**£ 508.1**
Zone 1B - Hereford Rural										
Zone 2 - Kington										
Zone Total	**£ 0.1**	**£ 0.3**	**£ 1.6**	**£ 0.1**	**£ -**	**£ -**	**£ -**	**£ 2.1**	**£ 0.3**	**£ 2.5**
Zone 3 - Leominster										
Zone Total	**£ 0.1**	**£ 2.6**	**£ 1.8**	**£ 30.4**	**£ 0.4**	**£ 0.3**	**£ -**	**£ 34.7**	**£ 6.6**	**£ 41.3**
Zone 4 - Bromyard										
Zone Total	**£ 0.1**	**£ 0.1**	**£ -**	**£ -**	**£ 3.4**	**£ 0.4**	**£ -**	**£ 4.1**	**£ 0.9**	**£ 4.9**
Zone 5 - Ledbury										
Zone Total	**£ 1.3**	**£ 1.2**	**£ -**	**£ 0.1**	**£ 0.5**	**£ 24.1**	**£ 0.9**	**£ 28.4**	**£ 8.3**	**£ 36.8**
Zone 6 - Ross-on-Wye										
Zone Total	**£ 1.8**	**£ 2.8**	**£ -**	**£ -**	**£ -**	**£ 0.2**	**£ 33.9**	**£ 39.1**	**£ 26.2**	**£ 65.3**
Non Zone										
Non Zone Total	**£ 9.7**	**£ 10.4**	**£ 0.1**	**£ 1.8**	**£ 6.4**	**£ 18.4**	**£ 51.4**	**£ 99.1**	**£ 26.2**	**£ 125.3**

Source/Notes
(1) Market share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007)
(2) Inflow of total turnover from outside of Study Area based on results of in centre surveys of Hereford City Centre and the market town centres undertaken by Research and Marketing (November 2007). Inflow for Ross Labels is allowed at some 1000% to account for the effects of tourist and other spend from outside the catchment. Inflows to significant facilities outside the market town centres, applied at circa 50% of the inflow to the centre.

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Table Comparison 20: Turnover of Facilities from Market Shares for All Comparison Goods Spending in 2021

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL	Inflow of Expenditure (£m)	Total Turnover
Population 2021	68,416	43,257	5,192	23,684	7,824	16,804	22,658	187,834		
Expenditure per Capita in 2021	£ 3,742	£ 4,138	£ 3,952	£ 3,927	£ 3,911	£ 4,075	£ 4,094			
Total Available Expenditure in 2021 (£m)	£ 256.0	£ 179.0	£ 20.5	£ 93.0	£ 30.6	£ 68.5	£ 92.8	£ 740.4		
Zone 1A - Hereford City										
Hereford Centre										
Hereford Centre Total	***£ 189.2***	***£ 138.5***	***£ 12.6***	***£ 48.3***	***£ 15.3***	***£ 16.3***	***£ 21.1***	***£ 440.8***	***£ 74.9***	***£ 515.7***
Outside Hereford Centre										
Outside Hereford Centre Total	***£ 51.4***	***£ 35.4***	***£ 3.8***	***£ 12.8***	***£ 3.6***	***£ 3.4***	***£ 7.0***	***£ 117.3***	***£ 0.4***	***£ 117.7***
Zone Total	**£ 240.6**	**£ 173.9**	**£ 16.4**	**£ 61.1**	**£ 19.0**	**£ 19.6**	**£ 28.2**	**£ 558.0**	**£ 75.3**	**£ 633.4**
Zone 1B - Hereford Rural										
Zone 2 - Kington										
Zone Total	**£ 0.1**	**£ 0.3**	**£ 2.0**	**£ 0.1**	**£ -**	**£ -**	**£ -**	**£ 2.7**	**£ 0.4**	**£ 3.1**
Zone 3 - Leominster										
Zone Total	**£ 0.1**	**£ 3.2**	**£ 2.3**	**£ 38.5**	**£ 0.5**	**£ 0.4**	**£ -**	**£ 43.3**	**£ 8.1**	**£ 51.4**
Zone 4 - Bromyard										
Zone Total	**£ 0.1**	**£ 0.2**	**£ -**	**£ -**	**£ 4.2**	**£ 0.6**	**£ -**	**£ 5.1**	**£ 1.1**	**£ 6.2**
Zone 5 - Ledbury										
Zone Total	**£ 1.7**	**£ 1.5**	**£ -**	**£ 0.1**	**£ 0.6**	**£ 29.9**	**£ 1.1**	**£ 35.5**	**£ 10.4**	**£ 45.9**
Zone 6 - Ross-on-Wye										
Zone Total	**£ 2.3**	**£ 3.4**	**£ -**	**£ -**	**£ -**	**£ 0.2**	**£ 42.0**	**£ 48.7**	**£ 32.7**	**£ 81.3**
Non Zone										
Zone Total	**£ 23.6**	**£ 23.7**	**£ 2.2**	**£ 8.1**	**£ 11.1**	**£ 29.3**	**£ 34.2**	**£ 130.2**	**£ -**	**£ 130.2**

Source/Notes
(1) Market share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007)

(2) Inflow of total turnover from outside of Study Area based on results of in centre surveys of Hereford City Centre and the market town centres undertaken by Research and Marketing (November 2007). Inflow for Ross Labels is allowed at some 1000% to account for the effects of tourist and other spend from outside the catchment. Inflows to significant facilities outside the market town centres, applied at circa 50% of the inflow to the centre.

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Table Comparison 21: Turnover of Facilities from Market Shares for All Comparison Goods Spending in 2026

	Zone 1A	Zone 1B	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	TOTAL	Inflow of Expenditure (£m)	Total Turnover
Population 2026	71,391	43,983	5,319	24,833	8,075	17,282	23,286	194,169		
Expenditure per Capita in 2026	£ 4,519	£ 4,997	£ 4,772	£ 4,742	£ 4,723	£ 4,921	£ 4,945			
Total Available Expenditure in 2026 (£m)	£ 322.6	£ 219.8	£ 25.4	£ 117.8	£ 38.1	£ 85.0	£ 115.1	£ 923.9		
Zone 1A - Hereford City										
Hereford Centre										
Hereford Centre Total	***£ 238.4***	***£ 170.1***	***£ 15.6***	***£ 61.1***	***£ 19.1***	***£ 20.2***	***£ 26.2***	***£ 550.0***	***£ 93.5***	***£ 643.5***
Outside Hereford Centre										
Outside Hereford Centre Total	***£ 64.8***	***£ 43.5***	***£ 4.7***	***£ 16.2***	***£ 4.5***	***£ 4.2***	***£ 8.7***	***£ 146.3***	***£ 0.5***	***£ 146.8***
Zone Total	**£ 303.2**	**£ 213.5**	**£ 20.3**	**£ 77.3**	**£ 23.6**	**£ 24.4**	**£ 35.0**	**£ 696.3**	**£ 94.0**	**£ 790.4**
Zone 1B - Hereford Rural										
Zone 2 - Kington										
Zone Total	**£ 0.2**	**£ 0.4**	**£ 2.5**	**£ 0.2**	**£ -**	**£ -**	**£ -**	**£ 3.3**	**£ 0.5**	**£ 3.8**
Zone 3 - Leominster										
Zone Total	**£ 0.1**	**£ 3.9**	**£ 2.8**	**£ 48.7**	**£ 0.6**	**£ 0.5**	**£ -**	**£ 54.0**	**£ 10.2**	**£ 64.2**
Zone 4 - Bromyard										
Zone Total	**£ 0.1**	**£ 0.2**	**£ -**	**£ -**	**£ 5.3**	**£ 0.7**	**£ -**	**£ 6.3**	**£ 1.3**	**£ 7.7**
Zone 5 - Ledbury										
Zone Total	**£ 2.1**	**£ 1.8**	**£ -**	**£ 0.2**	**£ 0.8**	**£ 37.2**	**£ 1.4**	**£ 44.2**	**£ 13.0**	**£ 57.2**
Zone 6 - Ross-on-Wye										
Zone Total	**£ 2.8**	**£ 4.2**	**£ -**	**£ -**	**£ -**	**£ 0.2**	**£ 52.1**	**£ 60.7**	**£ 40.8**	**£ 101.5**
Non Zone										
Non Zone Total	**£ 12.6**	**£ 11.4**	**£ 0.1**	**£ 2.9**	**£ 10.0**	**£ 28.1**	**£ 27.0**	**£ 93.3**	**£ -**	**£ 93.3**

Source/Notes
(1) Market share data derived from Household Telephone Survey undertaken by Research & Marketing on behalf of Herefordshire Council (November 2007)

(2) Inflow of total turnover from outside of Study Area based on results of in centre surveys of Hereford City Centre and the market town centres undertaken by Research and Marketing (November 2007). Inflow for Ross Labels is allowed at some 1000% to account for the effects of tourist and other spend from outside the catchment. Inflows to significant facilities outside the market town centres, applied at circa 50% of the inflow to the centre.

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Table Comparison 22: Facilities and Benchmark Turnovers in 2007

	Net Comparison Floorspace (sq m)	Benchmark Turnover (£/ sqm) 2006	Benchmark Turnover (£/ sqm) 2007	Benchmark Turnover (£m) 2007
Zone 1A - Hereford City				
Hereford Centre	**40,531**		**£ 5,327**	**£ 215.9**
Outside Hereford Centre	**28,120**		**£ 2,944**	**£ 82.8**
Zone 1B - Hereford Rural				
Zone 2 - Kington				
Kington Centre	**1,341**		**£ 2,585**	**£ 3.5**
Outside Kington Centre	**500**		**£ 2,500**	**£ 1.3**
Zone 3 - Leominster				
Leominster Centre	**12,442**		**£ 2,605**	**£ 32.4**
Outside Leominster Centre	**1,041**		**£ 5,249**	**£ 5.5**
Zone 4 - Bromyard				
Bromyard Centre	**2,186**		**£ 2,451**	**£ 5.4**
Zone 5 - Ledbury				
Ledbury Centre	**7,652**		**£ 3,046**	**£ 23.3**
Outside Ledbury Centre	**4,256**		**£ 1,902**	**£ 8.1**
Elsewhere	**14**		**£ 2,000**	**£0.03**
Zone 6 - Ross-on-Wye				
Ross on Wye Centre	**13,482**		**£ 3,240**	**£ 43.7**
Outside Ross on Wye Centre	**8,852**		**£ 1,830**	**£ 16.2**
Elsewhere	**2,388**		**£ 1,811**	**£4.33**
Non Zone				
Cheltenham	57,922	£3,000		£177.67
Worcester	40,814	£4,000		£166.93
Gloucester	39,793	£4,000		£162.75
Great Malvern	5,872	£2,500		£15.01

Source/Notes
(1) Floorspaces from IGD Foodstores (2007), Promap (2008) and information obtained from Herefordshire Council.
(2) Gross:net ratios are taken from IGD Foodstores (2007), Herefordshire Council data and Drivers Jonas Deloitte estimates
(3) Convenience / comparison split for named retailers taken from Retail Rankings (2007) and adjusted where store specific arrangement is known.
(4) Turnover per sq m is based on Drivers Jonas Deloitte estimates where company averages are unavailable.
(5) Allowance for increased sales density of 2.25% per annum applied 2006-2007.
(6) Allowance for 'Other Stores' in each zone is included based on Drivers Jonas Deloitte estimates.
(7) Focus Widemarsh Street, Hereford is now trading as a Wickes store.

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Table Comparison 23: Survey Derived Flows of Expenditure to Comparison Shopping Locations Compared to Benchmark Turnovers in 2007

	Survey Derived Turnover (£m)	Benchmark Turnover (£m)	Difference (£m)
Zone 1A - Hereford City			
Hereford Centre	£338.9	£215.9	£123.0
Outside Hereford Centre	£77.3	£82.8	-£5.4
Zone Total	**£416.3**	**£298.7**	**£117.6**
Zone 1B - Hereford Rural			
Zone 2 - Kington			
Kington Centre	£1.9	£3.5	-£1.6
Outside Kington Centre	£0.1	£1.3	-£1.1
Zone Total	**£2.0**	**£4.7**	**-£2.7**
Zone 3 - Leominster			
Leominster Centre	£33.4	£32.4	£1.0
Outside Leominster Centre	£0.4	£5.5	-£5.1
Zone Total	**£33.8**	**£37.9**	**-£4.1**
Zone 4 - Bromyard			
Bromyard Centre	£4.0	£5.4	-£1.3
Zone Total	**£4.0**	**£5.4**	**-£1.3**
Zone 5 - Ledbury			
Ledbury Centre	£27.5	£23.3	£4.2
Outside Ledbury Centre	£2.6	£8.1	-£5.5
Elsewhere	£0.0	£0.03	-£0.03
Zone Total	**£30.1**	**£31.4**	**-£1.3**
Zone 6 - Ross-on-Wye			
Ross on Wye Centre	£36.5	£43.7	-£7.2
Outside Ross on Wye Centre	£16.6	£16.2	£0.4
Elsewhere	£0.3	£4.3	-£4.1
Zone Total	**£53.4**	**£64.2**	**-£10.8**
TOTAL	**£539.7**	**£442.2**	**£97.4**

Source/Notes
(1) Tables 17 and 22.

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Table Comparison 24: Estimated Turnover of Retail Commitments (as of July 2010)

Application number	Date of Decision	Date of Expiry	Location	Proposals	Development Type	Total Gross A1 floorspace (sq m)	Total Net A1 floorspace (sq m)	Net Comparison Floorspace (sq m)	Benchmark Turnover (£/ sqm) 2006	Benchmark Turnover (£m) 2006	Benchmark Turnover (£m) 2007
Zone 1A - Hereford City											
Hereford Centre											
DCCW2007/1000/F	03-May-07	03-May-10	94 Grandstand Road, Hereford, Herefordshire, HR4 9NR	Change of use of ground floor to A1	Min Change of Use	54	41	41	£5,000	£0.20	£0.21
DCCW2007/0471/F	29-Mar-07	29-Mar-10	Retail Unit 3, 32 Aubrey Street, Hereford, HR4 0BU	Reversion from D2 use to A1 retail	Min Change of Use	64	48	48	£5,000	£0.24	£0.24
DCCW2007/2471/F	18-Sep-07	18-Sep-10	Shop Unit 2, 32 Aubrey Street, Hereford, HR4 0NU	Change of use from D2 use to A1 Retail	Min Change of Use	92	69	69	£5,000	£0.35	£0.35
Outside Hereford Centre											
			85 Whitecross Road, Hereford	Change of use to A1 retail use	Min Change of Use	216	162	162	£3,000	£0.49	£0.49
DCCE2005/1752/O	09-Mar-06	25-Jan-09	Holmer Road, Hereford (Morbaine Site)	Outline planning permission granted for 3,623 sq. m net floorspace of Class A1 non-food retail development, subject to conditions including a condition restricting the use to sales of bulky comparison goods.	Outline Planning Permission		3,623	3,623	£3,000	£10.87	£11.07
DCCE2006/1989/F	08-Dec-06	08-Dec-09	B&Q / Halfords Retail Units, Holmer Road, Hereford	Alterations to existing buildings including creation of five new entrance features on the front of the building and variation of Condition 8 of planning permission HC/880434/PF/E to allow a total of five individual retail units within the site.	Full Planning Permission	2,067	1,550	1,550	£3,000	£4.65	£4.74
DCCE2007/1724/F	06-Jul-07	06-Jul-10	Hereford Furniture, Staniers Way, Hereford, Herefordshire, HR1 1JT	Change of use of part of existing floor area to allow retail sales of furniture manufactured on site and ready assembled imported furniture.	Min Change of Use		193	193	£3,342	£0.65	£0.66
			Unit 4, Hereford Trade Park, Holmer Road, Hereford	Change of use from industrial to retail showroom	Min Change of Use	57	43	43	£3,000	£0.13	£0.13
Elsewhere											
DCCE2007/2266/F	05-Sep-07	05-Sep-10	Radway Bridge Nursery, Whitestone, Hereford, Herefordshire, HR1 3RX	Erection of 275 sq.m. sales building over existing external sales area. together with the laying out of a car park. All in connection with the existing nursery use of this site.	Min Others	275	206	206	£1,493	£0.31	£0.31
			Former Garden Centre, Rowlestone Lane, Pontrillas	Demolish existing building to build new warehouse and store/shop	Full Planning Permission	256	192	192	£3,000	£0.58	£0.59
Zone Total										**£17.87**	**£18.20**
Zone 1B - Hereford Rural											
			Lord Nelson Inn, Bishopstone	Change of use from public house to antiques centre	Min Change of Use	**199**	149	149	£3,000	£0.45	£0.46
Zone Total										**£0.45**	**£0.46**
Zone 2 - Kington											
			The Mere, Chickward, Kington	Convert agricultural building into a shop serving agricultural supplies	Full Planning Permission	**175**	131	131	£3,000	£0.39	£0.40
Zone Total										**£0.39**	**£0.40**
Zone 3 - Leominster											
DCND2006/3206/F			28, Broad Street, Leominster	Change of Use from B1-A1	Min Change of Use	30	23	23	£3,000	£0.07	£0.07
			Little Verzons, Munsley, Ledbury, Herefordshire, HR8 2PZ	Change of use of existing buildings to sale of timber garden sheds and domestic garden structures	Min Change of Use	400	300	300	£2,116	£0.63	£0.65
DCNC2008/1233/F	27/08/2008	27/08/2011	Morrisons, Baron's Cross Road, Leominster	Extension for additional sales area	Extension	405	365	84	£9,467	£0.79	£0.81
Zone Total										**£0.07**	**£0.07**
Zone 4 - Bromyard											
DCNC2007/1032/F	22-May-07	22-May-10	Live & Let Live, Whitbourne, Worcester, Herefordshire, WR6 5SP	Proposed change of use from Saddlery Workshop (Class B1) to Community Shop (Class A1)	Min Change of Use	20	15	15	£2,500	£0.04	£0.04
Zone Total										**£0.04**	**£0.04**
Zone 5 - Ledbury											
DCNE2008/0265/F	25-Mar-08	25-Mar-11	Olive Tree Restaurant, 44 The Homend, Ledbury	Conversion of units to A1	Min Change of Use	**90**	68	68	£3,000	£0.20	£0.21
DCNE2008/1492/F	27-Oct-08	27-Oct-11	12 High Street, Ledbury	Change of use and redevelopment to A1	Min Change of Use	**105**	79	79	£3,001	£0.24	£0.24
DCNE2008/0859/F	12-Jun-08	12-Jun-11	46 The Homend, Ledbury	Change of use from residential to A1 units	Min Change of Use	**28**	21	21	£3,002	£0.06	£0.06
Zone Total										**£0.50**	**£0.51**
Zone 6 - Ross-on-Wye											
DCSE2007/2569/F	08-Oct-07	08-Oct-10	Pengethley Garden Centre, -, Peterstow, Ross On-Wye, Herefordshire, HR9 6LL	Extension of farm shop within garden centre complex.	Extension	144	108	108	£2,000	£0.22	£0.22
DCSE2007/2556/F	17-Sep-08	17-Sep-11	Gardner Butcher Garages, Brookend Street, Ross-on-Wye, Herefordshire, HR9 7EG	Erection of Aldi discount food store with associated parking, landscaping and access.	Full Planning Permission	1,568	946	95	£696	£0.07	£0.07
DCSE2008/0775/O	20-Mar-09	20-Mar-12	Trelleborg Site, Alton Road Industrial Estate, Ross-on-Wye	Outline planning permission for redevelopment of site for B1b and c, B2 and bulky goods retail.	Outline Planning Permission	1,646	1,235	1,235	£3,000	£3.70	£3.77
DCSE2008/2414/F	10-Jun-09	10-Jun-12	Morrisons, Station Street, Ross-on-Wye	Extension and alteration to existing superstore	Extension	3,716	1,002	220	£9,467	£2.09	£2.13
DCSE2008/0749/F	30-Apr-08	30-Apr-11	Unit E, Beaver Centre, Ashburton Industrial Estate, Ross-on-Wye	Change of use from B1 to A1 retail warehouse	Min Change of Use	276	207	207	£3,000	£0.62	£0.63
Zone Total										**£0.28**	**£0.29**
TOTAL										**£19.60**	**£19.97**

Source/Notes
(1) Data from Herefordshire Council, April 2008.
(2) Sales density of named retailers from Retail Rankings (2007) converted to 2006 prices using Experian Retail Planner Briefing Note 5.1 (2007) Annex 1.
(3) Convenience/comparison floorspace split is Drivers Jonas Deloitte estimate unless otherwise stated.
(4) Gross: net ratio assumed 75% unless provided.

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Table Comparison 25: Summary of Capacity

	2007	2011	2016	2021	2026
Hereford City					
Total Population	170,096	175,164	181,499	187,834	194,169
Total Available Expenditure	£ 487	£ 514	£ 594	£ 740	£ 924
Retained Expenditure %	75%	75%	75%	75%	75%
Retained Expenditure £m	£ 367	£ 387	£ 448	£ 558	£ 696
Inflow %	12%	12%	12%	12%	12%
Inflow	£ 50	£ 52	£ 60	£ 75	£ 94
Actual Turnover of Existing Shops	£ 416	£ 439	£ 508	£ 633	£ 790
Benchmark Turnover	£298.7	£306.1	£325.7	£ 357.8	£393.1
Edgar Street Grid			£107.9	£ 163.6	£179.8
Other Commitments	£ -	£ 7.9	£ 20.4	£ 22.5	£ 24.7
Expenditure Surplus	£117.6	£125.4	£ 54.1	£ 89.4	£192.8
Sales Density	£5,327	£5,327	£5,598	£ 6,031	£6,497
Net Floorspace Requirement	22,076	23,551	9,655	14,831	29,670
Gross Floorspace Requirement	29,434	31,401	12,873	19,775	39,560
Zone 2 - Kington					
Total Population	4,835	4,937	5,064	5,192	5,319
Total Available Expenditure	£ 13.8	£ 14.5	£ 16.6	£ 20.5	£ 25.4
Retained Expenditure %	10%	10%	10%	10%	10%
Retained Expenditure £m	£ 1.3	£ 1.4	£ 1.6	£ 2.0	£ 2.5
Inflow %	33%	34%	34%	35%	35%
Inflow	£ 0.7	£ 0.7	£ 0.8	£ 1.1	£ 1.4
Actual Turnover of Existing Shops	£ 2.0	£ 2.1	£ 2.5	£ 3.1	£ 3.8
Benchmark Turnover	£ 4.7	£ 4.8	£ 5.1	£ 5.7	£ 6.2
Commitments		£ 0.4	£ 0.4	£ 0.5	£ 0.5
Expenditure Surplus	£ -	£ -	£ -	£ -	£ -
Sales Density	£2,585	£2,585	£2,717	£ 2,611	£3,001
Net Floorspace Requirement	-	-	-	-	-
Gross Floorspace Requirement	-	-	-	-	-
Zone 3 - Leominster					
Total Population	20,469	21,387	22,536	23,684	24,833
Total Available Expenditure	£ 58.3	£ 62.4	£ 73.4	£ 93.0	£117.8
Retained Expenditure %	41%	41%	41%	41%	41%
Retained Expenditure £m	£ 24.1	£ 25.8	£ 30.4	£ 38.5	£ 48.7
Inflow %	29%	28%	26%	25%	24%
Inflow	£ 9.7	£ 9.9	£ 10.9	£ 13.0	£ 15.5
Actual Turnover of Existing Shops	£ 33.8	£ 35.7	£ 41.3	£ 51.4	£ 64.2
Benchmark Turnover	£ 37.9	£ 38.8	£ 41.3	£ 45.4	£ 49.8
Commitments	£ -	£ 1.6	£ 1.7	£ 1.8	£ 2.0
Expenditure Surplus	£ -	£ -	£ -	£ -	£ 12.4
Sales Density	£2,605	£2,605	£2,737	£13,893	£3,177
Net Floorspace Requirement	-	-	-	-	3,890
Gross Floorspace Requirement	-	-	-	-	5,187

Zone 4 - Bromyard					
Total Population	7,120	7,321	7,573	7,824	8,075
Total Available Expenditure	£ 20.2	£ 21.3	£ 24.6	£ 30.6	£ 38.1
Retained Expenditure %	14%	14%	14%	14%	14%
Retained Expenditure £m	£ 2.8	£ 3.0	£ 3.4	£ 4.2	£ 5.3
Inflow %	31%	31%	31%	31%	31%
Inflow	£ 1.2	£ 1.3	£ 1.5	£ 1.9	£ 2.4
Actual Turnover of Existing Shops	£ 4.0	£ 4.3	£ 4.9	£ 6.2	£ 7.7
Benchmark Turnover	£ 5.4	£ 5.5	£ 5.8	£ 6.4	£ 7.1
Commitments	£ -	£ 0.0	£ 0.0	£ 0.0	£ 0.1
Expenditure Surplus	£ -	£ -	£ -	£ -	£ -
Sales Density	£2,451	£2,679	£2,576	£ 2,775	£2,989
Net Floorspace Requirement	-	-	-	-	-
Gross Floorspace Requirement	-	-	-	-	-
Zone 5 - Ledbury					
Total Population	15,466	15,848	16,326	16,804	17,282
Total Available Expenditure	£ 45.7	£ 48.0	£ 55.2	£ 68.5	£ 85.0
Retained Expenditure %	44%	44%	44%	44%	44%
Retained Expenditure £m	£ 20.0	£ 21.0	£ 24.1	£ 29.9	£ 37.2
Inflow %	34%	34%	34%	35%	35%
Inflow	£ 10.2	£ 10.8	£ 12.6	£ 15.9	£ 20.0
Actual Turnover of Existing Shops	£ 30.1	£ 31.8	£ 36.8	£ 45.9	£ 57.2
Benchmark Turnover	£ 31.4	£ 32.2	£ 34.2	£ 37.6	£ 41.3
Commitments	£ -	£ 0.5	£ 0.6	£ 0.6	£ 0.7
Expenditure Surplus	£ -	£ -	£ -	£ 7.6	£ 15.2
Sales Density	£3,046	£3,046	£3,202	£ 3,449	£3,716
Net Floorspace Requirement	-	-	-	2,209	4,094
Gross Floorspace Requirement	-	-	-	2,945	5,458
Zone 6 - Ross-on-Wye					
Total Population	20,900	21,402	22,030	22,658	23,286
Total Available Expenditure	£ 62.0	£ 65.1	£ 74.9	£ 92.8	£115.1
Retained Expenditure %	45%	45%	45%	45%	45%
Retained Expenditure £m	£ 28.1	£ 29.5	£ 33.9	£ 42.0	£ 52.1
Inflow %	47%	48%	48%	48%	48%
Inflow	£ 25.1	£ 26.7	£ 31.1	£ 39.0	£ 48.9
Actual Turnover of Existing Shops	£ 53.2	£ 56.1	£ 64.9	£ 80.9	£101.0
Benchmark	£ 59.9	£ 61.4	£ 65.3	£ 71.7	£ 78.8
Commitments	£ -	£ 3.1	£ 7.5	£ 8.2	£ 9.0
Expenditure Surplus	£ -	£ -	£ -	£ -	£ 13.2
Sales Density	£3,240	£3,240	£3,405	£ 3,405	£3,952
Net Floorspace Requirement	-	-	-	-	3,330
Gross Floorspace Requirement	-	-	-	-	4,440

Source/Notes

(1) Figures from Tables 1, 4 and 17-24.
(2) Figures exclude facilities located 'elsewhere' i.e. facilities located beyond the key town or city examined in the above analysis.
(3) Values expressed in £m.
(4) Net to gross ratio assumed to be 75%.
(5) Sales density drawn from Table 22 as the average turnover for the particular centre.
(6) 2006 prices.
(7) Floorspace efficiency assumed to be half of expenditure growth rate per annum for all centres / locations
(8) Date at which commitments are introduced is based on Drivers Jonas Deloitte estimates based on nature of proposals

(9) Figures for Edgar Street Grid have been estimated based on 17,500 sq.m. net comparison goods floorspace turning with a sales density of £6,000 psm (plus the comparison goods element of the convenience store - 367.5 sq.m. with a sales density of £7,500 psm) as part of Phase I, with a further 7,600 sq.m. net brought forward by 2021.

Appendix 4

Restaurants, Cafes and Public Houses Economic Analysis

Herefordshire Council

Drivers Jonas Deloitte.

Job title:
Herefordshire PPS4 Assessment 2010
Appendix 4: Cafes and Restaurants Analysis

Client:
Herefordshire Council

Drivers Jonas Deloitte ref file:
#17911868v1

Date:
August 2010

Herefordshire PPS4 Assessment
Assessment of Capacity for Restaurants, Cafes and Public Houses

Table 1: Study Area Population Estimates

Study Area Zones	2006	2007	2011	2016	2021	2026
Zone 1A - Hereford City	59,491	60,086	62,466	65,441	68,416	71,391
Zone 1B - Hereford Rural	41,076	41,221	41,803	42,530	43,257	43,983
Zone 2 - Kington	4,809	4,835	4,937	5,064	5,192	5,319
Zone 3 - Leominster	20,239	20,469	21,387	22,536	23,684	24,833
Zone 4 - Bromyard	7,070	7,120	7,321	7,573	7,824	8,075
Zone 5 - Ledbury	15,370	15,466	15,848	16,326	16,804	17,282
Zone 6 - Ross-on-Wye	20,774	20,900	21,402	22,030	22,658	23,286
Total	**168,829**	**170,096**	**175,164**	**181,499**	**187,834**	**194,169**

Source/Notes
(1) Study Area defined as shown in Appendix 1.
(2) Population figures for 2006 taken from Experian Demographic Report (January 2008).

(3) Population growth based on Housing Distribution identified in Herefordshire Core Strategy Place Shaping Document (as per RSS Phase II Preferred Strategy). For the towns this equates to growth over the plan period of 8,500 dwellings in Hereford, 2,500 dwellings in Leominster, 1,000 dwellings in Ledbury, 1,000 dwellings in Ross on Wye, 500 dwellings in Bromyard and 200 dwellings in Kington. Growth in rural areas is based on RSC/Hub allocations identified by Herefordshire Council in June 2010. The remainder of unallocated rural growth (2,600 dwellings) has been apportioned to Zones 1B-6 based on 2006 proportions of population. All additional dwellings are translated into population figures using the household density ratios and population projections produced by Herefordshire Council (June 2010).
(4) Study area population forecasts differ from county estimates due to catchment boundary differences and Experian base data (see supporting report)

Herefordshire PPS4 Assessment
Assessment of Capacity for Restaurants, Cafes and Public Houses

Table 2
Expenditure per Capita

	2006 (£)	2007 (£)	2011 (£)	2016 (£)	2021 (£)	2026 (£)
Zone 1A - Hereford City	£1,024	£ 1,046	£ 998	£ 1,070	£ 1,195	£ 1,246
Zone 1B - Hereford Rural	£ 986	£ 1,007	£ 960	£ 1,030	£ 1,150	£ 1,199
Zone 2 - Kington	£ 986	£ 1,007	£ 960	£ 1,029	£ 1,150	£ 1,199
Zone 3 - Leominster	£ 991	£ 1,012	£ 966	£ 1,035	£ 1,156	£ 1,206
Zone 4 - Bromyard	£ 993	£ 1,014	£ 967	£ 1,037	£ 1,158	£ 1,208
Zone 5 - Ledbury	£1,022	£ 1,044	£ 996	£ 1,067	£ 1,192	£ 1,243
Zone 6 - Ross-on-Wye	£1,021	£ 1,043	£ 995	£ 1,067	£ 1,192	£ 1,243

Sources/Notes:
(1) 2006 base EPH from Experian E-Marketer (January 2008).
(2) EPH projected to Study Years utilising Experian's Retail Planner Briefing Note 7.1 (August 2009), Figure 1, advised growth rates 2007: 2.15% (Briefing Note Update - April 2009), 2008: 0.4%, 2009: -4.5%, 2010: -1.5%, 2011: 0.7%, 2012-2016: 1.%, 2017-26: 1.8%
(3) 2006 Prices.

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Table 3
Total Expenditure

	2006 (£m)	2007 (£m)	2011 (£m)	2016 (£m)	2021 (£m)	2026 (£m)
Zone 1A - Hereford City	£ 60.9	£ 62.9	£ 62.3	£ 70.0	£ 81.7	£ 89.0
Zone 1B - Hereford Rural	£ 40.5	£ 41.5	£ 40.1	£ 43.8	£ 49.7	£ 52.7
Zone 2 - Kington	£ 4.7	£ 4.9	£ 4.7	£ 5.2	£ 6.0	£ 6.4
Zone 3 - Leominster	£ 4.8	£ 20.7	£ 20.7	£ 23.3	£ 27.4	£ 29.9
Zone 4 - Bromyard	£ 20.1	£ 7.2	£ 7.1	£ 7.9	£ 9.1	£ 9.8
Zone 5 - Ledbury	£ 7.2	£ 16.1	£ 15.8	£ 17.4	£ 20.0	£ 21.5
Zone 6 - Ross-on-Wye	£ 15.7	£ 21.8	£ 21.3	£ 23.5	£ 27.0	£ 28.9
Total	**£ 153.9**	**£ 175.1**	**£ 172.0**	**£ 191.1**	**£ 220.9**	**£ 238.2**
Expenditure growth		**2006-2007**	**2006-2011**	**2006-2016**	**2006-2021**	**2006-2026**
(£m)		**£ 21.2**	**£ 18.1**	**£ 37.2**	**£ 67.0**	**£ 84.3**
(%)		**£ 0.1**	**£ 0.1**	**£ 0.2**	**£ 0.4**	**£ 0.5**

Source/Notes
(1) Tables 1 and 2.

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