

Herefordshire context

The Core Strategy is based on an understanding of Herefordshire's unique characteristics, derived and continually evolving from the interaction between people and the environment, in addition to its relationship with adjoining areas, knowledge of past trends and how things are likely to change in the future. This section provides a profile of Herefordshire, its social, economic and environmental components and identifies the key issues and challenges we face.

Many of the key facts have been drawn from the *Understanding Herefordshire Report 2012* unless otherwise stated. This can be viewed at www.herefordshire.gov.uk/factsandfigures.

The place

Herefordshire is a large, predominately rural, landlocked county situated in the south western corner of the West Midlands region, on the border with Wales. It has a close relationship with neighbouring Shropshire and Worcestershire and there are a range of interactions taking place which cross Herefordshire's boundaries in all directions, including service provision, transport links and commuting patterns.

Figure 2.1 Herefordshire and surrounding counties



The county area covers 217,973 hectares. High hill ranges, including the Malvern Hills and Black Mountains, encircle much of the county at its perimeter. Away from these areas, the landscape is one of gentle rolling hills, dissected by wide river valleys with lower-lying plains in the centre. River crossing points have provided a natural focus for the development of many settlements, with others dispersed across Herefordshire's rich and diverse landscape.

The meandering river valley landscape which is the county's principal geographical feature is that of the River Wye; which enters Herefordshire near the Welsh town of Hay-on-Wye, flowing east to Hereford before leaving the county at the Wye Gorge, downstream of Ross-on-Wye. In addition to significant parts of the county being drained by the Wye river system, the River Wye, together with its valley setting, is in part, an Area of Outstanding Natural Beauty and integral to Herefordshire's identity.

At the county's heart is the city of Hereford which is the main centre for civil and ecclesiastical administration, health, education and leisure facilities, shopping and employment. The five market towns of Bromyard, Kington, Ledbury, Leominster and Ross-on-Wye, surround the city with a regularity that harks back to medieval times. Outside these urban areas, nucleated villages and smaller settlements, farms and other isolated properties characterise much of Herefordshire.

Social Progress

Key facts

Population:	183,600 ¹
Density:	0.8 persons per hectare (84 per square kilometre)
Population growth:	+4.9% in the decade since 2001 ² Estimated growth of 12% by 2031 ³
Age structure:	1 in 5 people (21.3%) are aged 65 or over. Since 2001 residents aged 90 or over grew by almost 40% whilst those aged 5-15 years fell by 12% ⁴
Ethnicity:	6% of residents are from ethnic groups other than 'white British'
Deprivation:	A fifth of households (14,500) live in poverty, mostly in urban areas
Access to services:	Close to two thirds of the county are amongst the 25% most deprived areas in England with respect to geographical barriers to services. These areas are predominantly rural
Education:	57.5% of pupils achieve 5 A*-C GCSEs 'A' level results in or close to upper quartile nationally

¹ Mid-2011 estimate based on the 2011 Census from the Office for National Statistics

² 2011 Census: population & household estimates for Herefordshire

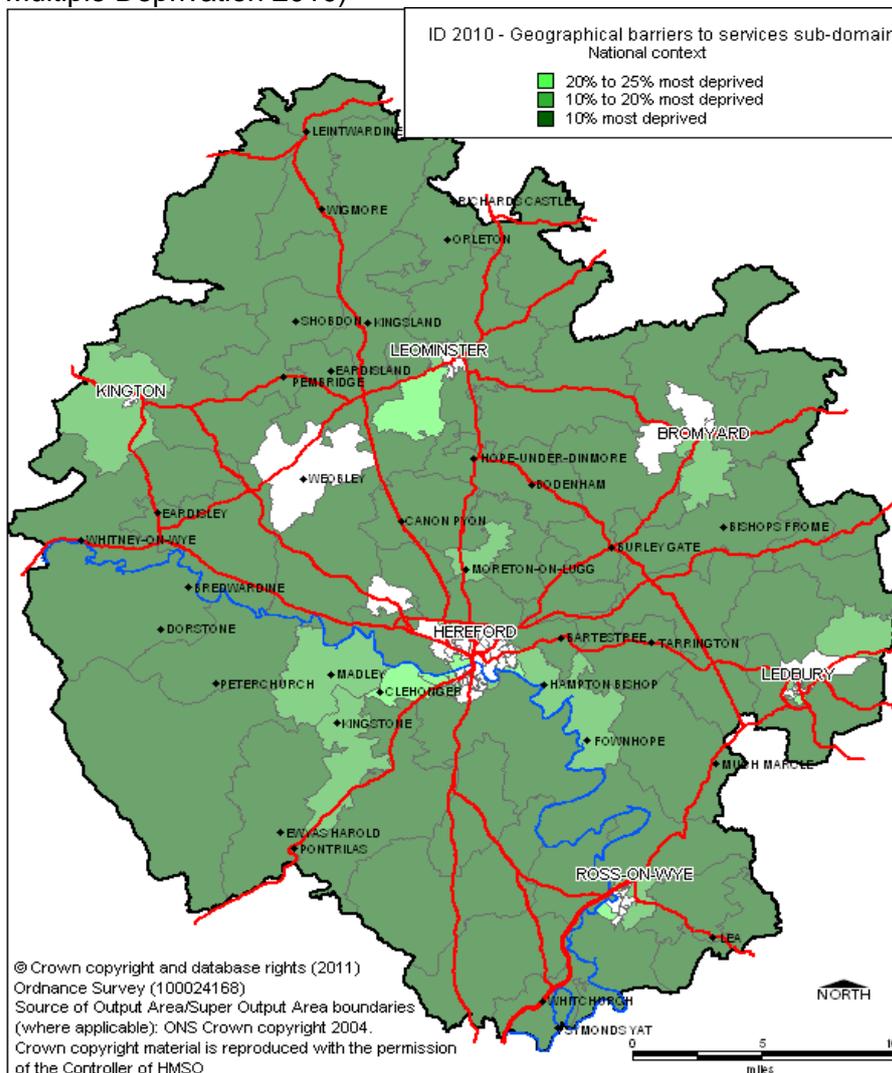
³ Update to Local Housing Requirement Study – March 2012

⁴ 2011 Census: population & household estimates for Herefordshire

Herefordshire's resident population is 183,600 (2011). This is the first estimate based on the 2011 Census and represented a growth of 4.9% between 2001 and 2011 (slower than the previous two decades and below the national average of 7% for the same period). The population is estimated to grow by about 12% by 2031⁵.

Herefordshire has a sparse population, with the fourth lowest overall population density in England (ninth in England and Wales). Just under a third of Herefordshire residents live in Hereford, with about a fifth in the five market towns and nearly half in the surrounding rural areas. Despite other counties having a lower overall population density, Herefordshire has the greater proportion of its population living in 'very sparse' areas (25%)⁶.

Figure 2.2 Map showing the areas of Herefordshire that are amongst the most deprived in England (Geographical Barriers to Services sub-domain of the Index of Multiple Deprivation 2010)



Source: Department of Communities and Local Government

This scattered population presents many challenges, both for residents in terms of; dependence on the private car, increased household costs, access to services, often

⁵ Update to Local Housing Requirement Study – March 2012

⁶ Sparsity of Population - <http://www.herefordshire.gov.uk/factsandfigures/subcounty>

poor or no broadband access and social isolation, as well as for the delivery of services, particularly to community members already experiencing disadvantage.

Whilst Herefordshire is widely regarded as being an affluent county, this masks issues of deprivation, poverty and a continued widening of the gap between the most and least deprived. Close to two thirds of the county are amongst the 25% most deprived in England with respect to geographical barriers to services and the average income of residents is significantly below both the regional and national averages. There are pockets of severe deprivation in parts of Hereford and Leominster, as well as potentially 'hidden' deprivation in rural areas.

Like the national population structure, Herefordshire's population is ageing with one in five people aged 65 or over (compared to one in six nationally)⁷. Figure 2.3 shows how much older the age structure of Herefordshire is compared to England and Wales, with higher proportions of residents in all age groups from 45-49 upwards and less in the middle aged groups. Both national and local forecasts predict a further rise in the proportion of older people and thus a need to plan for the consequence of an ageing population, for example by providing for supported and extra care housing, and ensuring better access to health care and community facilities.

Figure 2.3. Age structure of Herefordshire (bars) and England and Wales (lines), from the 2011 Census⁸



⁷ 2011 Census: population & household estimates for Herefordshire

⁸ 2011 Census: population & household estimates for Herefordshire

Housing and transport

There are 79,122 households in Herefordshire (2011) and this is projected to increase by 23.3% by 2031⁹, contributing to the need to provide additional housing. Housing affordability is a key issue, with Herefordshire having the worst housing affordability ratio (in 2011 house prices were 8.6 times annual earnings) within the West Midlands region. High house prices, particularly relative to earnings, brought about by demand and a current housing offer, which encompasses a high proportion of high value properties, has increased the need for lower priced market housing and all forms of affordable houses.

Planning for Herefordshire's ageing population and strong retirement market by the development of 'homes for life' to facilitate independent living and care needs will become increasingly important. At the same time, there is the opportunity to plan for more balanced and integrated communities by providing the right mix of housing and facilities to cater for people at different stages in their life cycle, and with different incomes and needs. This will require the provision of more affordable housing, more family sized and smaller homes for younger households, facilities for children and young people, and a wider range of employment opportunities for people of working age.

Herefordshire plays a strategic role in facilitating cross boundary links between England and Wales. Whilst vehicle flows along these strategic routes are considered low in a national context, when coupled with local movement, congestion, journey time delays and air pollution they are problematic, notably within Hereford. Car ownership and dependency is high due to the lack of public transport in rural areas and the need to access services and employment from these areas. The need for significant investment in transport infrastructure is acknowledged, although the current economic climate is likely to affect this.

Education and training

In 2011 the portion of pupils achieving 5 A*-C GCSEs including English and Maths was marginally below the national average (57.5% compared to 58.4% nationally). The performance of young people in full time education up to 19 has been strong in Herefordshire's schools and colleges, with performance consistently in or close to the upper quartile nationally for 'A' levels. Significant redevelopment projects at Hereford's colleges have also been completed and may improve access to courses and training. However access to further and higher education sites remains a key issue for such a rural county, with many young people leaving the county altogether to undertake formal higher education.

Community safety

Herefordshire is generally a low crime area, with a 13% reduction in total crimes over the three years to March 2011. The highest level of all types of recorded crime is in the main population centres and residents in some of these areas experience a higher fear of crime. Road safety is a key concern for county residents.

⁹ Update to Local Housing Requirement Study March 2011 by GL Hearn

Social issues, problems and challenges

- Provide for all generations; promoting balanced and integrated communities
- Ensure the provision of the right mix of housing, including affordable housing to maximise community benefits
- Ensure the provision of and enhanced access to services, facilities, education and broadband in a rural, sparsely populated county
- Improve transport and communication infrastructures
- Reduce opportunities for crime

Economic Prosperity

Key facts

Economic output: Low, increasing at a lower rate than the West Midlands region and England between 2001 - 2010¹⁰
Business sizes: Predominantly small, employing 10 or fewer staff

Business starts-up: Low rate but businesses survive longer

Main industry sectors: Wholesale & retail, manufacturing, health & social work

Employment: 76% of 16-64 year olds are economically active¹¹

Self-employment rate: 15% of working age population in 2008-2009¹²

Unemployment: 2.5% (October 2012)¹³
Average income: Low - £20,080 (gross median annual earnings 2011)

The economy

Herefordshire's economic output is low when compared regionally and nationally. The overall productivity of the county is affected by a relatively large proportion of employment being in sectors that tend to attract lower wages such as 'wholesale and retail' and 'accommodation and food services' and 'agriculture'¹⁴. There is comparatively low employment in knowledge based industries and out of county commuting for work, both of which affect output.

Herefordshire has a small business economy, with 86% of businesses employing 10 or fewer staff. Business start-up rates are lower than England as a whole, although business survival rates are better. The self-employment rate (15%) is greater than the West Midlands (8%) and England (9%) and along with home based businesses play an important role in the economy, particularly in rural areas.

The three sectors which employ the greatest proportion of workers are: wholesale and retail trade (19%); manufacturing (14%); and human health and social work (12%). However, agriculture accounts for a greater proportion of employees (8%)

¹⁰ Herefordshire Local Economic Assessment 2010

¹¹ Economic Activity in Herefordshire - www.herefordshire.gov.uk/factsandfigures/1253.aspx

¹² Herefordshire Economic Assessment 2010

¹³ Unemployment — www.herefordshire.gov.uk/factsandfigures/1563.aspx

¹⁴ Herefordshire Local Economic Assessment 2010

when compared regionally and nationally (both 1%)¹⁵. With regard to employment locations, the majority of workers are employed in Hereford (42%) and the market towns 25%. (of which Leominster, accounts for 8% and Ross-on-Wye 7%)¹⁶. In 2011 the county's primary employment site, the Rotherwas Estate (on the edge of Hereford), was awarded Enterprise Zone status. This is an opportunity to provide a catalyst for economic growth through inward investment and skilled job creation.

The principal barrier to business growth and diversification, particularly in rural Herefordshire, is poor infrastructure, including poor broadband and mobile phone coverage. The £50 million Borders Broadband project, in partnership with Gloucestershire County Council, aims for all rural areas to gain access to at least 2Mbps (megabits per second) broadband speeds, with many people receiving much higher speeds.

Earnings are persistently low and the gap between Herefordshire's earnings and those of the West Midlands and England as a whole is getting wider. By contrast unemployment is lower when compared on these scales. Since 2009 the proportion of residents without any qualification has been higher in Herefordshire than in England as a whole.¹⁷ A gap in skills and hard-to-fill vacancies are problematic for businesses. There also remains a demand for migrant labour.

Herefordshire has a strong, diverse and independent third sector (voluntary, community & non-profit), with a wide range of voluntary organisations, community groups, social enterprises and housing associations contributing to county life.

Tourism

With fine, tranquil, rural landscapes where leisure activities can be enjoyed, cultural and historic interest, together with a calendar of varied events and a strong creative offer that includes local food produce, Herefordshire has much to appeal to visitors. Tourism has become an important part of the local economy with visits and tourist expenditure growing. In 2011 there were 5.1 million visitors, spending £466.8 million and 9% of employees in Herefordshire worked in tourism¹⁸. There remains potential to grow Herefordshire's tourism offer and further investment will have benefits for the county.

Revitalising town centres

Hereford is identified as a sub-regional centre and is the dominant centre for shopping and services for county residents. However it lacks a wide range of shopping (non-food goods) and entertainment facilities, thereby struggling to compete with neighbouring centres outside of the county (Worcester and Gloucester). The relocation of Hereford's livestock market and redevelopment of this 43 hectare site just north of the city centre will provide a range of retail, leisure and housing. The Edgar Street Grid scheme offers an opportunity to transform this under-utilised area, regenerate the local economy and widen the experiences offered by the city, strengthening its role in the county and region. Hereford and the five market towns have a good provision of independent retailers and whilst being primarily locations for food shopping for residents, their historic environments and niche shopping also make them appealing to visitors.

¹⁵ Herefordshire Local Economic Assessment 2010

¹⁶ Herefordshire Local Economic Assessment 2010

¹⁷ Qualifications - <http://factsandfigures.herefordshire.gov.uk/qer.aspx>

¹⁸ Herefordshire - Steam Report 2011

Revitalising the town centres and making them more attractive destinations for both residents and visitors will benefit the local economy and aid wider regeneration.

Economic issues, problems and challenges

- Diversify the economy, creating more skilled jobs to reduce out of county commuting and retention of young educated residents
- Raise wage levels so reducing the earnings gap
- Overcome barriers to business growth and diversification
- Capitalise on educational achievements and improve rates of qualification
- Invest in and promote Herefordshire's tourism potential for the enjoyment of all
- Strengthen the roles of Hereford and the market towns as attractive centres for retail and leisure in the county and region

Environmental quality

Key facts

Natural environment:	2 Areas of Outstanding National Beauty (AONB) 4 Special Areas of Conservation (SAC) 77 Sites of Special Scientific Interest (SSSI) 3 National Nature Reserves (NNR) 773 Local Wildlife Sites (LWS)
Historic environment:	5899 Listed buildings ¹⁹ 263 Scheduled Ancient Monuments 24 Registered historic parks and gardens 64 Conservation areas
Flooding:	10% of land within Flood Zone 2 (low to medium risk) 9% within a Flood Zone 3 (high risk)

Natural environment

Herefordshire is considered to be the West Midlands' most rural county. The countryside is rich and varied, ranging from the high hills of the border areas and the dramatic steep sloping Wye Gorge, to the gentle rolling slopes of the Golden and Teme Valleys and the low lying river meadows of central Herefordshire. Large tracts of this landscape are of high quality with the Wye Valley and Malvern Hills having national AONB designation, whilst the area along the western boundary with the Brecon Beacons National Park is of the highest quality it lacks any national designation. Many ancient local landscapes continue to survive intact in the face of development pressures and the county's remoter areas often possess a continuity and tranquillity that is increasingly scarce.

Due to its topography, geology and rivers the landscape of Herefordshire has preserved many natural features and traditional land uses resulting in a county rich in

¹⁹ This total is derived from the records for Herefordshire currently held in the National Heritage List. It is a dynamic figure which may fluctuate as new assets are designated and/or existing designations are reviewed.

biodiversity and natural assets. Herefordshire's natural environment supports a wide range of habitats, including the ancient woodlands of the Wye Valley, the near natural River Wye, the forested ravine of the Downton Gorge and the county's treasured traditional fruit orchards. The richness of biodiversity within Herefordshire is reflected in the number of statutory (e.g. SACs, SSSIs & NNRs) and non-statutory sites (e.g. LWS) designated for nature conservation which cover 9% of the county.

The county's geology, resultant soil types and the vegetation they support have shaped a landscape which is highly fertile, particularly on low lying land, making food production an enduring primary activity. The Herefordshire landscape is a key economic asset creating not only an attractive place to live and work but also an important tourist destination.

Historic environment

Herefordshire possesses a rich historic environment which includes numerous Iron Age hill forts, sites of Roman towns, defensive features such as Offa's Dyke and the border castles, together with some of the best preserved traditional timber framed buildings in the country. The richness of the historic environment is reflected in the number of designated heritage assets encompassing a wealth of listed buildings, registered historic parks and gardens, scheduled ancient monuments and conservations areas. These add to the special built quality and environmental character of many areas of the county and their protection and enhancement is recognised as an important ingredient for economic and neighbourhood renewal.

The county's archaeological heritage is a valuable but fragile part of our historic environment. A large part of central Hereford is one of only five cities in England to be designated an area of archaeological importance. Despite having such nationally recognised heritage at its core, the great extent of Herefordshire's archaeological resource is not well surveyed or even assessed. Opportunities associated with developments and externally funded projects will continue to be secured to gain a better understanding of our archaeological heritage.

The wider value of historic landscapes is recognised through the designation of 64 conservations areas, which vary in character and size from tiny hamlets to villages to country house estates, market towns and Hereford's historic centre. Rather than one vernacular building style, Herefordshire has a diverse range of buildings of which perhaps the most well-known and distinctive is the 'black and white' timber framed traditional buildings of the northern half of the county.

Climate change

The threat of climate change means that the climate is likely to become unpredictable, probably with longer periods of both dry and wet weather and these may be more severe and intense... Significant areas of Herefordshire are low-lying and liable to flooding. Climate change will further increase the risk and events of flooding (including flash flooding) across the county. Additionally, climate change will result in a loss of biodiversity and landscape character, together with an impact on agricultural practices leading to increased water demand.

The potential impacts of climate change need to be taken into account in planning for all new development, both in terms of location and design. Increased energy and water efficiency will have to be taken on board along with water storage measures, sustainable drainage systems, and the provision of renewable energy generation.

Air quality

There are relatively low levels of air pollution within Herefordshire however two areas have been identified as Air Quality Management Areas (AQMA) due to levels of the pollutant nitrogen dioxide (from vehicle emissions) exceeding national standards. These two areas are the A49 road corridor through Hereford and the area of the Bargates road junction in central Leominster. Emissions of carbon dioxide whilst decreasing remain higher per head of population (8.6 tonnes per capita) when compared nationally (7.4 tonnes per capita). Herefordshire's rural nature and high car dependency has an impact on air quality locally and more widely on climate change.

Water environment

Flood risk is a key issue in Herefordshire and in some areas a significant constraint to new development. 10% of land is situated within flood zone 2 (low to medium risk) and 9% is situated within flood zone 3 (high risk) as identified by the Environment Agency. In addition to river flooding, runoff has increased as agriculture has intensified and more roads and houses have been built, degrading the natural permeability of the landscape and capacity to retain water.

As already indicated, the River Wye and its tributaries are amongst the most important natural assets of Herefordshire. However, phosphate levels in small sections of the River Wye Special Area of Conservation (SAC) are presently exceeding the conservation objectives for the river, degrading the ecosystem. This is the result of controlled waste water discharges associated with residential and industrial developments and agricultural practices in the catchment area. Therefore to ensure all sections of the River Wye meet the favourable condition phosphate target it is essential that future inputs are controlled. The catchment of the Wye covers a significant area of the county and a continuing programme of management and improvements is necessary to facilitate new development during the plan period.

Minerals and waste

Known mineral resources in Herefordshire are relatively limited in range, primarily consisting of aggregates (sand, gravel and crushed rock (limestone))²⁰. Aggregates from Herefordshire quarries supply both local markets and the wider area. The main non-aggregate mineral being worked is sandstone for use as building stone and roof tiles. In contrast to the aggregate quarries, the extraction of sandstone is a small-scale operation dependent on need and market demand. The continued extraction of aggregates and sandstone will be required to meet future growth demands, local sandstone being vital for building restoration, as well as maintaining local characteristics.

In partnership with Worcestershire County Council, Herefordshire has prepared a Joint Municipal Waste Management Strategy up to 2034. This has been reviewed in light of legislative and fiscal changes. Waste levels have declined since 2004²¹ and recent initiatives have been effective in increasing household recycling of waste (40% in 2010-11) and reducing the amount going to landfill. The levels of waste generated and how this is treated remain an issue, especially as populations grow.

²⁰ Herefordshire Minerals and Waste Planning Assessment 2009

²¹ The Joint Municipal Waste Management Strategy for Herefordshire and Worcestershire 2004 – 2034 – First Review August 2011

Environmental issues, problems & challenges

- Protect and enhance the county's rich natural and historic assets
- Address climate change and flooding
- Plan for the potential impact of climate change in new developments
- Ensure new developments are of high quality design and construction reflecting Herefordshire's distinctive character
- Use resources efficiently
- Improve air and water quality
- Continue reducing waste levels, including increasing recycling and a reduction in the amount of waste going to landfill