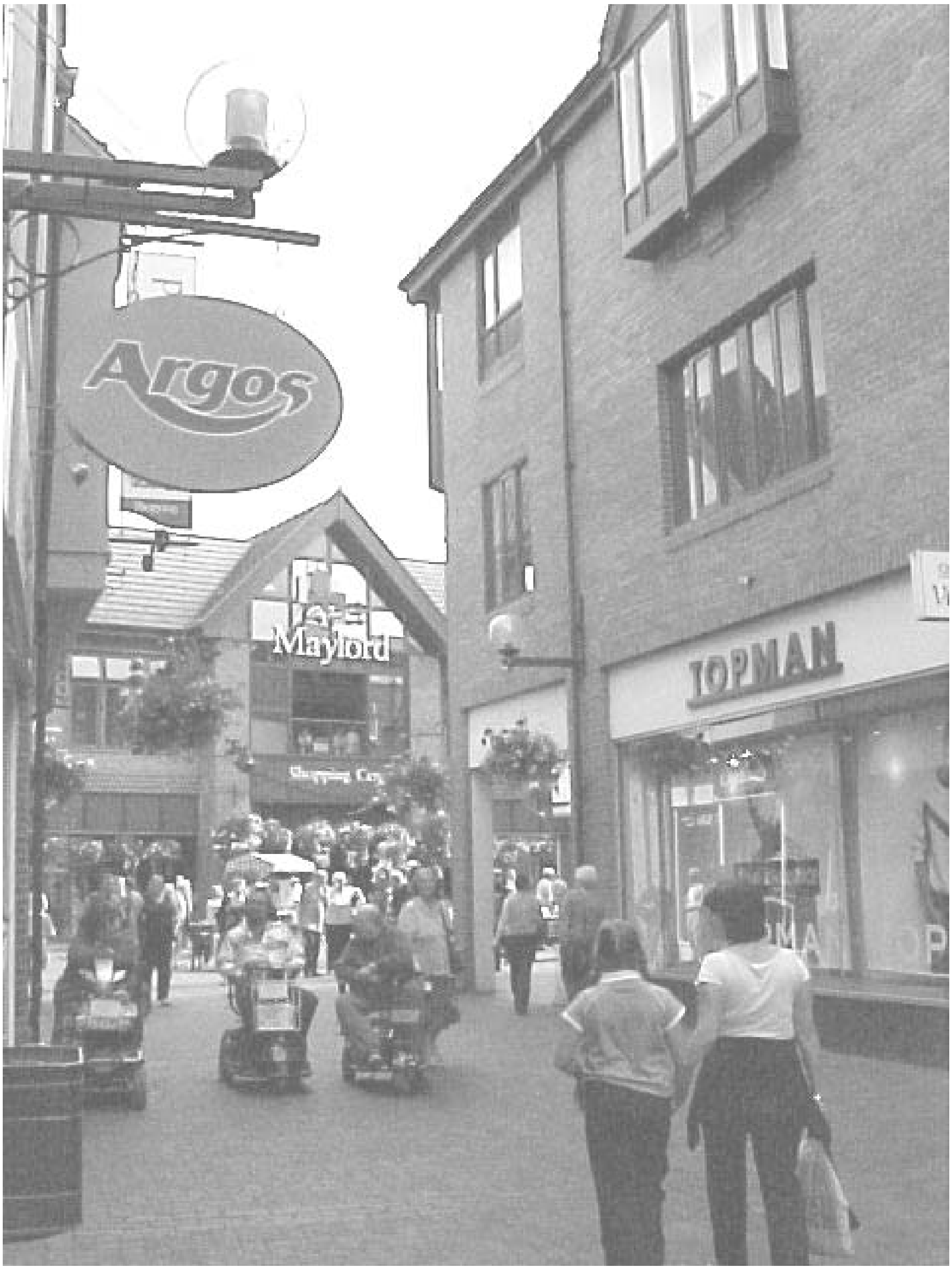
HEREFORDSHIRE COUNCIL

Herefordshire Unitary Development Plan

TOWN CENTRES AND RETAIL



Deposit Draft
BACKGROUND PAPER
September 2002

Herefordshire Unitary Development Plan

Town Centres and Retail Background Paper

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1 INTRODUCTION

Aims of the paper

1.1 This background paper has been produced as part of the preparation of the Herefordshire Unitary Development Plan (UDP). Reference will be made to the issues and facts contained in this paper in order to justify the policies and proposals of the UDPs written statement.

1.2 This Paper is one of a number of papers covering the principal areas to be considered by the UDP.

1.3 The purpose of the Paper is to assess the issues relating to town centre and retail developments in order to inform the policy stance in the UDP.

Structure

1.4 The paper is divided into eight sections. These are:

Section Two summarises relevant Central Government Planning Policy Guidance including Regional Planning Policy Guidance;

Section Three sets out the hierarchy of centres in Herefordshire;

Section Four summarises the approach taken to review town centre boundaries

Section Five sets out the review of policies concerned with managing the diversity of uses in town centres

Section Six sets out the scale of retail development requirements for the UDP period, with particular emphasis on Hereford

Section Seven sets out the scale of commercial leisure, hotel and other commercial development requirements for the UDP period, with particular regard to Hereford

Section Eight summarises the key issues identified in the previous sections

2 NATIONAL PLANNING POLICY GUIDANCE

2.1 Central Government Guidance upon town centres and retail development is contained within a number of Planning Policy Guidance Notes (PPGs). The following are considered to have the most direct relevance:

PPG6 (Town Centres and retail development)
PPG13 (Transport)
RPG11 (Regional Planning Guidance for the West Midlands)

2.2 The UDP aims to be consistent with this guidance while taking into account local circumstances. The relevant sections of these guidance notes are summarised below.

PPG6 – 'Town Centres and Retail Development', 1996

The main objectives of PPG6 relevant to this Paper are:

- To sustain and enhance the vitality and viability of town centres
- To focus development in locations where the proximity of businesses facilitates competition from which all consumers are able to benefit and maximises the opportunity to use means of transport other than the car
- To maintain an efficient, competitive and innovative retail sector
- To ensure the availability of a wide range of shops, employment, services and facilities to which people have easy access by a choice of means of transport

2.3 In realising these objectives the guidance promotes a plan-led approach to focus development, especially retail development in town centres. This will be achieved through plan wide policies and also the identification of specific locations and sites for development. Policies and allocations should follow consideration of existing provision, in consultation with business interests and the local community (Para 1.4-1.7).

2.4 This plan led approach should reflect and define a multi tiered hierarchy of centres from city centre, through town centres, district centres to local centres and village centres. The hierarchy should thus inform development plan policies and proposals that identify those locations where new retail, office, hotel and entertainment provision will be promoted, and where existing provision will be enhanced (Para 1.5). However, the guidance also advises that planning authorities should recognise that the role, function and relative importance of centres will change over time (Para 1.5).

2.5 The guidance emphasises the sequential approach to site selection for new development proposals, including retail, employment, leisure and other key town centre uses. Para 1.15 of the guidance states:

'This approach should also apply to all key town centre uses which attract a lot of people, including commercial and public offices, entertainment, leisure, and other such uses. These should be encouraged to locate in city, town and district centres. Smaller scale facilities such as health centres, branch libraries, local offices of the local authority, primary schools, pubs and restaurants, should be encouraged in local centres'.

2.6 Para 1.11 of the guidance states that in applying the sequential test, first preference should be for town centre sites only. The second preference is for edge of centre sites and those in district and local centres. Only then, as a third choice, should out of centre sites well served by a choice of modes of transport be considered.

2.7 However, it is also important to note at Para 1.10 of the guidance that a sequential approach should only be carried out on the basis of consideration of the need for new retail development. If no such need can be demonstrated then there will be no requirement for the development plan to identify additional sites in a particular location.

2.8 Where retail development is proposed, but is not envisaged in a development plan, applicants should show the need for additional facilities and that a sequential approach to site selection has been carried out.

2.9 The interpretation of the requirement to demonstrate need was subject to ministerial clarification by the former Minister Richard Caborn in February 1999 following a number of high profile appeal decisions and Court of Appeal cases. This clarification fully endorsed the plan-led approach, stating that 'in preparing strategies and policies, [local authorities should] consider the need for new retail and leisure development'. In terms of identifying those factors that may constitute 'need', the former Minister stated that:

'the requirement to demonstrate 'need' should not be regarded as being fulfilled simply by showing that there is capacity (in physical terms) or demand (in terms of available expenditure within the proposal's catchment area) for the proposed development. While the existence of capacity or demand may form part of the demonstration of need, the significance in any particular case of the factors which may show need will be a matter for the decision maker'.

2.10 If an applicant is unable to demonstrate any such need, the then Minister stated that this 'would normally justify the refusal of planning permission unless there were weighty additional material considerations'.

2.11 In summary, the guidance contained in PPG6 and subsequent clarification provides a robust, step by step policy approach as a basis for development plan policy formulation.

PPG13 - 'Transport', 2001

2.12 The guidance contained in PPG13 seeks to integrate transport and land use planning in order to promote more sustainable patterns of development, reducing reliance on the private motor car. It reiterates those elements of PPG6 concerned with ensuring that retail and leisure facilities are accessible by public transport, walking and cycling; stating that a key planning objective should be to 'focus land uses which are major generators of travel demand in city, town and district centres' (Para 20). Para 35 of the guidance reaffirms the commitment to establish a hierarchy of centres in order to identify preferred locations for major retail and leisure development.

2.13 In terms of rural areas, PPG13 states that in 'remote areas well away from large urban centres' the focus for development providing employment, retail and leisure facilities or services should be 'local service centres' (para 41). The guidance states that these service centres may be a market town, large village or a group of villages and should be identified in the development plan.

RPG11 - 'Regional Planning Guidance for the West Midlands', 1998

2.14 The Government Office for the West Midlands produced Regional Planning Guidance in April 1998. It was prepared by the Government Office for the West Midlands in response to advice received from the Wet Midlands Regional Forum of local authorities. The document provides a strategic planning framework for the region until superseded by the replacement Regional Planning Guidance in 2003.

2.15 Herefordshire, together with parts of Worcestershire, Shropshire and Staffordshire forms part of the area termed the rural north and west. The RPG is consistent with the guidance contained in PPG6 and the current PPG13 in that it requires development plans to direct major generators of travel demand to existing centres (para 3.6).

3 Draft Regional Planning Guidance for the West Midlands, 2001

3.1 In November 2001 the West Midlands Local Government Association produced replacement Draft Regional Planning Guidance for the West Midlands. Once approved by the Secretary of State in 2003, the Guidance will replace the existing Regional Planning Guidance (1998) and provide a basis for development plans up to 2021.

3.2 The draft guidance marks a fundamental change in direction from the previous RPG. The draft guidance seeks to reverse a historic outmigration of people and jobs from the conurbation facilitated by previous strategies while also promoting the regeneration of the rural areas of the region.

3.3 Those elements of the draft RPG concerned with the scale and location of town centre retail and commercial development reflect the settlement hierarchy contained in the Spatial Strategy, and has regard to research carried out to determine the role and status of individual centres within the region. This research identified strong growth in the non-food retail, leisure and other town centre sectors over the RPG period but advised that the great majority of this growth could and should be accommodated within existing centres.

3.4 The Spatial Strategy is based upon three tiers of centre. The main focus for development and investment are the Major Urban Areas (MUAs) of Birmingham, Black Country, Coventry and North Staffordshire. The spatial strategy lists a further six centres as major sub regional foci for development with a number of other larger settlements also identified.

3.5 In terms of Herefordshire, Policy SS7 identifies Hereford as a sub regional focus for development together with Shrewsbury, Telford, Worcester, Burton on Trent and Rugby. Para 3.61 of the draft guidance states that Hereford should provide 'a focus for growth to support the regeneration of the rural area to the West of the region'.

3.6 In support of its sub regional role, Policy SS8 and Policy PA14 of the draft guidance states that these centres should provide the focus for major new retail developments and other uses that attract large numbers of people. For this reason, large scale leisure and office development will also normally be expected to locate within this network of centres. This policy is consistent with the guidance contained in PPG6 in that it requires local planning authorities to consider the need or capacity for development while taking a proactive approach to identifying potential sites for development within the network of centres.

3.7 In terms of assessing out of centre retail development proposals, Policy PA17 advises that it is unlikely any further out of centre retail developments of over 10 000sqm will be required in the region over the RPG period. Instead, such development will be limited to small scale proposals and be considered against the guidance contained in PPG6 and subsequent ministerial clarifications.

4 HIERARCHY OF CENTRES

4.1 In this section the approach used to establish the hierarchy of centres in Herefordshire is set out.

4.2 There is no generally accepted method of how planning authorities should define the hierarchy of centres within development plans. The approach used in this Paper is based upon the objective of identifying those centres where investment in new retail, leisure and other town centre development should be directed and existing provision enhanced in order to realise sustainable patterns of development.

4.3 The approach used in this paper has regard to the report of the Examination In Public (EIP) to the town centre policies of the Shropshire and Telford & Wrekin Joint Structure Plan (May 2001), and to a review of best practice carried out as part of the Lancashire Joint Replacement Structure Plan (October 2000).

4.4 The first part of this section considers the existing status of centres in Herefordshire as set out in Regional Planning Guidance, the County Structure Plan and constituent local plans.

The current development plan

4.5 Draft Regional Planning Guidance for the West Midlands identifies Hereford as a sub regional centre and strategic town/city centre; the highest tier of centre in the region outside the Major Urban Areas (MUAs) of the conurbation. It is the only centre in the County with this status. However, Policy PA14 of the draft guidance states that 'there are many other centres within the Region that meet local needs and it will be the role of local plans and UDPs to identify and develop policies for such centres within their respective areas which best meet local needs'.

4.6 The current Regional Planning Guidance Note 11 does not provide such a classification of centre.

4.7 Within the adopted development plan for Herefordshire a number of centres are defined. However, in identifying these centres it is apparent that on the whole, the constituent authorities adopted an intuitive approach, rather than one based upon a set of rigorous criteria. The existing 'hierarchy' of centres is discussed below.

4.8 The sub regional strategic planning framework for the County in the form of the County Structure Plan predates the current version of PPG6. This previous guidance adopted a more market driven approach to planning for retail and town centre development and did not require development plans to set out a hierarchy of centres to the extent of the current PPG6.

4.9 The constituent local plans for Herefordshire comprise the South Herefordshire District Local Plan, the Leominster District Local Plan, the Malvern Hills District Local Plan and the Hereford Local Plan.

4.10 The South Herefordshire District Local Plan (adopted 1999) identifies Ross-on-Wye as the only market town and main retail area for shopping in the former district (Para 8.1). While Policies RT.3 and RT.4 are concerned with existing and limited additional neighbourhood and village shops the Local Plan does not seek to identify specific locations where these policies may apply.

4.11 A similar policy approach was adopted by the Leominster District Local Plan (adopted 1998). Para 5.21 of the Local Plan identifies the market towns of Leominster and Kington as the locations where retail and service functions should be concentrated and enhanced. While Policy A.34 refers to village and neighbourhood centres, no specific locations are identified.

4.12 The Malvern Hills District Local (adopted 1998) does establish a formal retail hierarchy as required by PPG6. The Local Plan sets out a set of criteria that distinguish between town centres, district centres and local centres. In adopting these criteria, the Local Plan defines Bromyard and Ledbury as the main shopping centres in the district and the locations where additional large scale retail and commercial development will be promoted. The Local Plan does not identify any district or local centres in that part of the former district that is within Herefordshire.

4.13 The Hereford Local Plan (adopted 1996) covers the urban area of Hereford and the countryside immediately surrounding it. Para 5.1 of the Local Plan recognises Hereford as a sub regional shopping centre that serves an area roughly equivalent to the current administrative area of Herefordshire. Para 5.25 of the Local Plan also identifies a network of local shopping centres that meet the needs of the neighbourhood. These local shopping centres are discussed at Para 4.34 below.

4.14 In summary, the existing local plans in Herefordshire do not provide a rigorous retail hierarchy that may be carried forward into the Herefordshire UDP. While these plans identify Hereford and the market towns as the principal retail and service centres in the County they only infer a network of local and village centres.

Review of best practice

4.15 The guidance contained at Annex A of PPG6 establishes a terminology and classification criteria for a range of centres. These are:

town centre – city, town and traditional suburban centres that provide a broad range of facilities and provide a focus for the community and for public transport
district shopping centre – groups of shops separate from the town centre, usually containing at least one food supermarket and non-retail services such as banks or restaurants
local centre – small grouping usually comprising a newsagent, grocery store, post office and other shops of a local nature

4.16 While this guidance is useful in indicating the broad scale and range of facilities associated with particular types of centre, it does not advise on how centres that may nominally be within the same tier relate to each other.

4.17 In this regard it is worth considering the recommendations of the EIP Panel to the Shropshire and Telford & Wrekin Joint Structure Plan. Like Herefordshire, Shropshire is a largely rural county with a network of market towns providing a range of retail, leisure and service functions to an extensive hinterland.

4.18 The deposit version of the Joint Structure Plan identified three tiers of centre within the plan area. First are the sub regional centres of Shrewsbury and Telford, second six ‘main market towns’ and thirdly 11 ‘smaller centres’. This hierarchy was based solely upon the size of the retail function of particular centres. The hierarchy and associated policies did not attach value to other town centre uses such as offices, hotels or entertainment facilities.

4.19 Objectors to this hierarchy argued that it did not reflect the range of activities provided by centres, or the different functions of centres that are nominally within the same tier of the hierarchy. In considering these objections, the EIP Panel advised that the hierarchy be fundamentally recast in order to allow for flexibility to accommodate changes in the functions of individual centres that may appear to be of similar size on the basis of a single indicator. The Panel also recommended that associated policies should direct to town centres and their fringes proposals for offices, hotels and entertainment facilities, and not only retail development.

4.20 Research carried out as part of the Lancashire Joint Replacement Structure Plan process in October 2000 reviewed the single tier retail hierarchy used in the previous structure plan. This research provided a series of recommendations on best practice. The principal recommendation was to establish a multi tier hierarchy to be used as the basis for determining the appropriateness of scale and location for new retail and town centre development in the County.

4.21 The research reviewed the approach used by other shire counties and identified a number of approaches. These included an intuitive approach, one based on a single indicator (normally retail provision) and an approach using a set of indicators.

4.22 The study recommended the use of a series of indicators to be the most robust and rigorous means of determining a hierarchy of centres. This approach is thus consistent with the issues discussed above in relation to the Joint Shropshire and Telford & Wrekin Structure Plan. The most commonly used indicators are: retail floorspace, number of national multiple retailers / department stores, non-food retail catchment area size/population and retail turnover. The study also recommended that the hierarchy should relate to other land use policies, in particular the overall settlement and transport strategies.

4.23 While this approach was used to identify a hierarchy of centres of towns all with populations of above 20 000 people, it is sufficiently flexible to be used in the identification of smaller centres in Herefordshire with populations of only several thousand.

Preferred study approach

4.24 For the reasons given above, this paper adopts a study approach similar to that used for the Joint Lancashire Structure Plan review. This approach identifies a hierarchy of centres based upon a number of indicators in order to provide information on the size and function of particular centres.

4.25 The indicators used were:

- Parish/town population. This factor was used as an indicator of the local population able to support shops and services within the individual centre. Those parishes with a larger population are better able to sustain both existing shops and services and additional facilities. The parish populations were produced by the research section of the Council and are based upon the 1999 mid year estimates.
- Retail provision. This factor was used to indicate the current level of shopping facilities within individual centres. With the exception of Hereford, the floorspace of individual shops was not available and so the study uses a simple count of A1 uses. A larger number of shops normally indicate a higher order centre with a wide range of facilities serving an extensive catchment area.
- Professional services. This factor was used to indicate the importance of an individual centre in terms of its provision of financial and other professional services.
- Leisure facilities. This factor was used to indicate the importance of a centre in providing a range of leisure facilities including public houses, cafes, restaurants and theatres etc.

4.26 Each centre was ranked for every indicator, and the total score calculated. The centres were then ranked according to their total score.

Choice of centres

4.27 The selection of centres subject to this study reflects the settlement hierarchy of the emerging UDP. This settlement hierarchy is based upon the spatial strategy of Regional Planning Guidance contained in RPG11. This Guidance identifies the following tiers of settlement:

- Hereford
- Market towns
- Sustainable transport hinterlands of Hereford and the market towns
- Remaining rural areas

4.28 This study considers those centres in the three highest levels of centre in the spatial strategy; Hereford, the five market towns and 46 ‘main villages’ in the sustainable transport corridors. These main villages are considered to be the most sustainable locations for additional residential development. The process used to identify ‘main villages’ is set out in the UDP background paper on Housing issues. In summary, these 46 ‘main villages’, (shown in Figure 1) were identified having regard to:

- Population of 250 and over (within the village)
- Location within a defined public transport corridor with at least five bus services per day
- Level of existing facilities and services (including schools, employment provision, shops and village halls etc).

Figure 1 - Geographical distribution of Main Villages and Smaller Settlements within Herefordshire

σ Main Village (population of 250 and over) ● Smaller Settlement (population of 100 and over)	Not to scale

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For this reason, the hierarchy of the centres is based upon a wider UDP settlement strategy, itself derived from the spatial strategy which underpins the Regional Planning Guidance.

Analysis of centres

4.29 In order to establish the groupings of centres a step by step approach has been used. Table 1 in Appendix 1 lists the level of facilities contained within individual centres.

4.30 This analysis demonstrates a clear and predictable distinction between the level of facilities provided by Hereford, the market towns and the main villages. This distinction between these tiers of centre is apparent against all indicators.

4.31 Hereford ranks highest against all indicators, reflecting its dominance as the primary retail and service centre for the County and its role as a sub regional centre.

4.32 In terms of the market towns, there is evidence of a distinction between the level of facilities provided by Ross-on-Wye, Leominster and Ledbury and the smaller centres of Bromyard and Kington. However, in spite of such differences, the towns act as the foci for public transport provision and are the major centres for retail, professional services and leisure uses for their rural catchment.

4.33 The study has revealed marked differences in the range of facilities and thus importance of the main villages. A concentration of facilities in particular villages may be historical (resulting from their origins as small market towns (Weobley, Pembridge and Leintwardine)), their importance as tourist centres (Eardisland) or the result of market responses to high rates of residential development (Colwall, Credenhill and Cradley). Conversely, other villages contain a relatively high parish population but a low level of services (Clehonger and Burghill). This may result from the proximity of other larger competing centres or constraints to commercial development resulting from land use planning designations. Those villages with a wider range of services are more likely to be associated with a larger catchment area and thus support additional facilities.

Determining the hierarchy

4.34 The study that underpins the Joint Replacement Lancashire Structure Plan distinguishes between a proactive and reflective approach to developing a hierarchy of centres. A proactive approach is one that reflects the shopping patterns that the planning authority would wish to see, whereas a reflective approach is one that is based upon existing shopping patterns. This study also recommended that 'the shopping hierarchy should be linked directly to the settlement strategy of the Structure Plan in order to relate new retail development to other development and thereby enhance sustainability'.

4.35 In adopting an approach based upon the UDP settlement strategy, the retail hierarchy that has been identified by this study is proactive in nature. In adopting this approach, and having regard to the above analysis, the following hierarchy has emerged, as shown on Table 1.

Table 1 - Herefordshire retail hierarchy

Tier 1 **Sub regional centre**	Tier 2 **Market town**	Tier 3 **Local shopping centre**
Hereford	Bromyard Kington Ledbury Leominster Ross-on-Wye	Bartestree & Lugwardine Bodenham Colwall Cradley Credenhill Eardisley Ewyas Harold Fownhope Kingsland Kingstone Leintwardine Marden Pembridge Peterchurch Weobley Withington

Source: Herefordshire Council

Tier 1 - Sub Regional Centre

4.36 The importance of Hereford as the sub regional centre reflects its dominance of retail, leisure and service provision. Hereford also forms the principal centre for public administration, education and health service in the County. The city has a population of over 55 000 and ranks highest according to all indicators.

Tier 2 - Market Towns

4.37 These towns all have a population of over 2 000, provide an important retail function (of at least 50 shops and a supermarket) and a range of leisure uses including a theatre or bingo hall (with the exception of Kington). In addition to these commercial functions, the market towns provide a range of professional services, education, administrative and community hospital functions. The market towns serve a wide rural area but are subservient to Hereford for higher order retail and leisure uses.

Tier 3 - Local Shopping Centres

4.38 These centres are the 16 overall highest ranking main villages with one exception (Orleton). They all have a parish population of between around 700 and 2 000 persons, and contain all main villages with at least three shops, and with one exception, all main villages with at least three leisure uses (largely limited to public houses). Orelton was not considered to have the status of a local shopping centre on grounds of its low level of retail provision.

4.39 These centres generally serve to satisfy the leisure and top up shopping needs of the village and a limited surrounding rural area.

4.40 In addition to these three tiers of centre, there is also an important tier of shopping and service centre contained in the network of 11 local neighbourhood shopping centres identified in the Hereford Local Plan. These are:

Chilton Square
Quarry Road
Folly Lane (Whittern Way)
College Green
Holme Lacy Road
Grandstand Road

Whitecross
Oval
Hinton Road
Old Eign Hill
Bobblestock

4.41 These centres provide for the top up shopping needs of the surrounding urban area and contain a range of retail and service facilities. Due to the comparative small size of the other market towns there are no significant groups of retail and other uses that warrant a similar notation.

Key Issues

4.42 a) A hierarchy of centres should establish those locations where investment in new retail, leisure and other town centre development should be located in order to realise sustainable patterns of development.

b) The current County Structure Plan and constituent local plans do not provide a hierarchy of centres as required by PPG6.

c) The review of best practice has revealed a multi tiered approach based upon a number of criteria to be the most robust means of establishing a hierarchy of centres.

d) The study has identified a three-tiered hierarchy of centres within Herefordshire. Hereford is confirmed as the sub regional centre with the five market towns providing an ancillary role. A network of larger villages serving a rural hinterland forms the third tier.

5 DEFINING CENTRAL SHOPPING AND COMMERCIAL AREAS

5.1 In this section the approach used to define the extent of the town centre retail, leisure and other commercial / service functions is set out.

5.2 The first part of this Section considers the need for identifying Central Shopping and Commercial Area (CSCAs) boundaries, followed by an assessment of the boundaries contained in the current local plans. On this basis, the Paper sets out the approach used to define a set of CSCAs to be taken forward into the UDP.

The need for Town Centre CSCAs

5.3 The purpose of defining the CSCAs is to provide a focus for retail, leisure and other travel intensive development and to prevent their spread into surrounding residential areas. Thus, within such centres a wide range of uses will be promoted, enhancing the vitality and viability of the centre and reducing the need to travel.

5.4 The delineation of a CSCA boundary thus provides certainty to ascertain the town centre from surrounding residential and mixed use areas. The boundary is an important tool in promoting the plan led approach and forms the starting point for sequential test assessments.

Current development plan approach

5.5 The existing adopted Local Plans identify a set of CSCA's around Hereford and four of the five market towns. No CSCA is shown around the centre of Ross-on-Wye or for any of the Tier 3 centres identified at Section 3.0. The criteria used by each of the former authorities to determine the delineation and nomenclature of the CSCAs was slightly different. These boundaries were largely inherited from previous development plans and were subject to minor modification during the most recent round of local plan review and formulation. For example, the CSCA of Hereford Centre in the Hereford Local Plan is referred to as the Central Shopping Area and is drawn tightly around the commercial core, excluding surface car parks and mixed use areas within the line of the inner ring road. By contrast, the Principal Shopping and Commercial Areas of Bromyard and Ledbury in the Malvern Hills Local Plan include concentrations of residential properties, industrial activities and areas of mixed use physically separate from the commercial core.

5.6 In order to have uniformity within the UDP, there was a need to review all boundaries against a single set of criteria.

Review approach

5.7 CSCA boundaries were delineated around Hereford and the market towns. It was not considered necessary to identify such boundaries around the Tier 3 centres. These local centres are small scale and are locations where limited development related to the needs of a modest rural catchment is likely to be appropriate. Also, retail and commercial uses in these centres are often interspersed with blocks of residential properties and so the concept of identifying a CSCA is inappropriate.

5.8 In identifying the CSCA boundaries in Hereford and the market towns a number of criteria were used. The use of these criteria has resulted in changes to the CSCA boundaries in all market towns but ensures a standardised approach. These criteria are set out below:

Land use

5.9 The CSCA is traditionally the place where the provision of shopping and service facilities is concentrated together with leisure activities such as cinemas, theatres, pubs, restaurants and offices. It is the social and economic heart of the town centre. The research carried out to underpin the retail hierarchy also revealed this diversity of uses to be a strong characteristic of all market towns. However, retail activity continues to be the dominant activity and main function of the CSCA. The key land uses used to delineate the CSCA were:

5.10 National and regional multiple retail outlets. The location of multiple retail operators in a town centre is often used as an indicator of its perception as a strong and viable centre for additional investment.
Other shops
Entertainment and leisure uses such as cinemas, theatres and pubs
Town centre offices
Rental values

Physical characteristics

5.11 Wherever possible the CSCA should follow physical features, buildings, roads or curtilages. In order to ensure a targeted and restricted area for new retail development, the boundary should exclude large undeveloped areas such as surface car parks on the edge of the CSCA in order to restrain development opportunities. The physical criteria used to identify the CSCA were:

5.12 Strong physical boundaries to pedestrian movement such as heavily trafficked roads or watercourses
Historic core
Height of buildings

Activity

5.13 The numbers of people and movement of people on the streets, in different parts of the centre indicate the potential footfall available to support existing and new shops and services.

Planning History

5.14 Existing commenced planning permissions, recent refusals, appeal decisions and Local Plan Inspectors recommendations concerning areas on the edge of town centre have been considered in defining boundaries. Where such decisions are in accord with national and local planning policy the definition of the boundary will reflect the decision.

UDP proposals

5.15 The CSCA boundary will be altered to include UDP proposals for retail, leisure and other appropriate town centre uses.

5.16 On the basis of these criteria, a revised set of CSCA boundaries will be carried forward into the deposit draft UDP.

Key issues

5.17 a) Central Shopping and Commercial Areas (CSCAs) are an important and well utilised planning tool to provide a focus for retail, leisure and other town centre development.

b) The current adopted local plans in Herefordshire do not provide a set of CSCA boundaries based upon consistent criteria that may be carried forward into the UDP.

c) The UDP contains a set of boundaries for Hereford and the market towns based upon common criteria.

6 PLANNING FOR A DIVERSITY OF USES

6.1 In this section the approach used to manage the balance between retail and other uses in the Central Shopping and Commercial Areas is set out.

6.2 The first part of this section discusses why development plans should manage this balance, followed by an assessment of the policy approach contained within the existing development plan. Finally, the Section sets out a preferred policy stance to be carried forward into the UDP.

The need for management

6.3 The importance of Hereford and the market towns as locations for retail activity is reflected in their status in the hierarchy of centres, and in the delineation of the Central Shopping and Commercial Areas (CSCAs). An important characteristic of the CSCAs is the provision of a wide range of shops within an attractive and compact area. The concentration of retail activity within this limited area, with substantial runs of retail frontage and varied and changing window displays, is also responsible in large part for its busy and vibrant character. In order to maintain this character, the overall emphasis on retail trading in the main shopping streets should be retained.

6.4 Although retailing may be the primary function of the CSCA, Hereford and the market towns are also the major providers of leisure and professional services functions for the County. These A2 and A3 uses can complement the retail function and help to diversify the range of activities offered by a town centre, making it more attractive to residents, shoppers and tourists.

6.5 Guidance contained at Annex D of PPG6 advises that development plans may manage the balance between A1, A2 and A3 uses through the use of primary and secondary shopping frontages (Para 6). Primary frontages should contain a 'high proportion' of A1 uses whereas secondary frontages should provide greater scope for flexibility in those areas where 'diversification has most to offer' (Para 6).

Current development plan policy

6.6 The current set of local plans in Herefordshire contain policies concerned with managing the balance between retail and other town centre uses in the CSCAs of Hereford and the market towns. No such approach is provided for the Tier 3 centres. The approach adopted in these plans is summarised below.

6.7 Policy 21 of the Ross-on-Wye section of the South Herefordshire District Local Plan identifies a 'Central Shopping Zone' of the town centre where shopping uses are concentrated and should continue to be important. Although described as a 'zone' the area subject to Policy 21 consists of a single tier of shopping frontages reflecting the traditional linear nature of the town centre shopping function.

6.8 At the time of the drafting of the Local Plan, the town centre was suffering from a relatively high vacancy rate. This was attributed to adverse market conditions and to Local Plan policies that restricted the introduction of further non-retail uses. Rather than contract the size of the Central Shopping Zone in order to concentrate the remaining retail function, the Local Plan adopted a more flexible approach to the introduction of non retail uses and thus promoting a more diverse range of uses in the town centre. As a result of this policy stance, Policy 21 allows up to 33% (or two out of six units) of frontage in a particular part of the Central Shopping Zone to be in non A1 use. The equivalent threshold in the previous local plan was 15%

6.9 The Leominster District Local Plan identifies a two tier set of shopping frontages in Leominster, and a single tier in Kington. These frontages reflect those areas of the town centres where retail uses are concentrated and should be retained in order to safeguard the compact nature of the shopping function. The greatest restrictions on the introduction of additional non A1 uses are in the 'Primary Shopping Streets' of Leominster town centre where no more than 20% of frontage should be in non retail use. There is no equivalent tier of frontage in Kington because of the small size and form of the CSCA. In the secondary areas of Leominster town centre, and in the main shopping streets of Kington, a set of 'Principal Shopping Streets' are identified where a far greater degree of flexibility is promoted with up to 50% of frontage being permitted to be in non-retail use.

6.10 A similar distinction between primary and secondary frontages is contained in the Malvern Hills District Local Plan and a set of frontages is defined for Bromyard and Ledbury. However, Local Plan Shopping Policies 4 and 5 do not indicate the appropriate balance between A1 and non retail uses that should be promoted.

6.11 The Hereford Local Plan contains an extensive set of Primary and Secondary shopping frontages that reflect the concentration of retail trading activity within the historic core of the City. While Local Plan Policy S5 does not preclude the introduction of additional A2 and A3 uses into Primary Shopping Frontages, A1 uses should continue to 'dominate'. Within the Secondary Shopping Frontages a more flexible approach is adopted. Provision is made for A2 and A3 uses in these areas, so long as the character of each of the frontages is respected and non-retail uses do not become concentrated into blocks of more than two units.

6.12 In summary, shopping frontage policies contained in the existing set of local plans for Herefordshire adopt a variety of approaches to managing the balance between A1 and non-retail uses in town centres. It is also apparent that the delineation of frontages in these local plans is largely inherited from previous development plans and is partly reflective (protecting existing concentrations of A1 uses) and partly aspirational (reflecting the authorities thoughts on how A1 uses should be distributed). For these reasons, the constituent local plans do not provide a set of primary and secondary frontages and associated policies that may be carried forward into the UDP.

UDP approach

6.13 For the reasons set out above, it is important that the retail function of the CSCAs of the County is protected, while also permitting appropriate levels of ancillary A2 and A3 uses.

6.14 In distinguishing between primary and secondary shopping frontages in the CSCAs, the UDP has had regard to the following criteria:

- Concentration of retail uses. Prime shopping areas are characterised by a dominance of Class A1 retail uses.
- Multiple representation. Multiple retailers will seek to locate in primary areas of the CSCA where levels of pedestrian footfall are greater and concentrations of A1 uses facilitate 'linked trips'.
- Pedestrian footfall. The numbers and movement of people on the streets reflects the links between pedestrian magnets (shops and services) and generators (car parks, public transport termini, residential and employment areas).
- UDP proposal sites. The allocation of land for retail, leisure and pedestrian generating development will affect shopping patterns within CSCAs, enhancing the shopping functions of particular streets and areas.
- Rents. There are marked differences in the levels of Zone A rents (the rental value of the first six metres of floorspace from the shopwindow) between primary and secondary areas.
- Physical barriers to movement.

6.15 On the basis of these criteria, a revised set of CSCA boundaries has been carried forward into the deposit draft UDP.

Key issues

6.16 a) Guidance contained in the PPG6 advises that development plans may distinguish between primary and secondary areas of town centres in order to manage the balance between A1, A2 and A3 uses.

b) The current set of local plans adopt a variety of approaches to non retail uses in shopping streets.

c) The UDP should establish a set of primary and secondary frontages based upon common criteria for Hereford and the market towns in order to protect the primary retail function and allow appropriate levels of ancillary A2 and A3 uses.

7 NEW RETAIL DEVELOPMENT REQUIREMENTS

7.1 A retail capacity assessment is an important pre-requisite to any UDP strategy for town centres and retail development. This section provides the level of demand for additional retail floorspace over the UDP period.

7.2 This assessment of future floorspace requirements is limited to Hereford only. As the sub regional centre, Hereford should be the focus for large scale retail development over the UDP period. There will also be demand for additional retail floorspace in the market towns, but this is likely to be of more modest scale that can be managed through the application of area-wide UDP policies.

7.3 The study uses a conventional step by step approach; first examining population and potential expenditure of residents, the estimated turnover of existing and committed floorspace, and then assessing future floorspace requirements on the basis of levels of residual spending.

7.4 The study approach is very similar to that used by Hillier Parker when appointed by the former Hereford City Council in 1994 to assess future shop floorspace need for the City to 2001. This Hillier Parker study has formed the basis of a number of subsequent retail studies including those produced for the s77 Inquiry into proposed large scale retail warehouse development at Newtown Road (ref WMR/P/5244/223/1). The approach used by Hillier Parker thus provides a tried and tested structure for any subsequent assessments of future shopping floorspace in Hereford.

Definition of catchment area

7.5 As part of the 1994 Retail Audit undertaken by the former Hereford City Council, Hillier Parker commissioned a household interview survey within an extensive geographical area around Hereford. This catchment area covers the city of Hereford and those areas beyond it from which significant amounts of retail expenditure are likely to be drawn. This was divided into 30 postcode areas. The catchment area is elongated to the west, but curtailed somewhat to the east because of the proximity of Worcester, Gloucester and Cheltenham. The geographical extent of the catchment area is shown on Plan 1 in Appendix 2.

The household interview survey

7.6 The household interview survey was carried out by Research and Marketing Limited. The purpose of the survey was to identify the attraction of existing shops in Hereford relative to competing centres elsewhere, for each of the main classes of retail goods. The definition of these goods corresponds to those established by the Unit for Retail Planning (URPI) and is as follows:

Convenience goods – food, alcoholic drink, other convenience goods
Comparison (high street) goods – clothes and shoes, other goods including jewellery, silverware, recreational and miscellaneous
Bulky durable goods – furniture and floor coverings, household textiles, radio / electrical, china, glassware, hardware, DIY and decorators supplies

7.7 The survey was of a sample of 750 private telephone subscribers in 30 postcode areas, drawn at random from the relevant telephone directories, in proportion to the number of interviews required for each postcode area. Interviewers worked through the list of telephone numbers, and undertook to interview if the respondent fitted into the postcode district allocated. Non respondents were called up to four times, at different periods of the day. If an interview was not achieved, this contact was then abandoned.

7.8 Full results of the household survey are attached in Appendix 3. They provide a detailed picture of where residents within the catchment area shop most often for each of the main classes of retail goods.

Shopping patterns

7.9 The shopping survey results revealed that there was no other centre within or beyond the Hereford catchment area that attracted any significant proportion of expenditure generated from within the catchment area. The extent of the Hereford catchment area by sector and those of the market towns is shown in Appendix 4.

7.10 With regard to main food shopping, stores in Hereford were the principal shopping destination for 43.3% of survey respondents. Of this 43%, 91% of respondents identified one of only four stores in Hereford as the location for their main food shopping trip. These stores are J Sainsbury, Tesco (Belmont and Bewell Street) and Safeway. After stores in Hereford, the next most popular locations were Leominster (11% of respondents), Ross-on-Wye (8.6% of respondents) and Monmouth (8.1% of respondents).

7.11 In terms of high street comparison shopping, including expenditure on clothes, footwear and other fashion goods, Hereford was the principal shopping destination for 64% of survey respondents. The next most popular centres were Cardiff, Gloucester and Newport, but these centres attracted only 3.5% and 4.5% of respondents respectively, with no other centre recording more than 3%.

7.12 A broadly similar pattern demonstrating the overall dominance of Hereford within the local shopping system was revealed with regard to questions concerning bulky durable shopping. In total, 51.3% of respondents identified Hereford as their principal shopping destination for furniture, floor coverings and household textiles. This response generated a response of 13.5% giving the answer ‘don’t do’ with regard to this form of shopping. If this element of ‘don’t do’s’ is excluded the percentage of respondents identifying Hereford as their principal destination for such shopping increases to 59.3%.

7.13 With regard to the purchase of electrical goods and related items, 53.7% of respondents identified Hereford as their main shopping destination. The next most popular destinations for such purchases were Leominster, Monmouth and Ross-on-Wye, but these centres only attracted responses of between 5.7% and 7.5%. No other centre was identified by more than 3.2% of respondents.

7.14 With regard to DIY and associated retailing 62% of respondents identified Hereford as their main shopping destination. A further 6.7% of respondents identified Monmouth but no other centre attracted more than 3.1% of respondents.

7.15 In the light of the above it is evident that Hereford enjoys a dominant position within its retail catchment with only relatively small proportions of people, principally resident in locations on the periphery of the catchment area, patronising other larger centres for either high street type durable shopping or bulky goods shopping. Furthermore, those other centres that are patronised by residents of the catchment area compromise a relatively large number of centres located on and beyond the geographical periphery of the catchment area.

7.16 Given the widespread dispersal of such competing shopping destinations, rather than such competition being focussed in a small number of larger principal centres, development in such centres in the period since 1994 is likely to have had only a minimal affect upon the overall shopping patterns revealed by the 1994 survey. For example, the significant extension of comparison shopping facilities in locations such as Merry Hill, in Dudley, and at Cribbs Causeway, in Bristol, is unlikely to have had any significant impact upon the shopping patterns revealed by the 1994 survey as those centres are geographically relatively remote from Hereford and, despite their higher order in the retail hierarchy, attracted little (if any) significant element of the comparison goods expenditure from the Hereford catchment area at 1994.

7.17 In overall terms therefore, and having regard to the considerations set out above, it is reasonable to assume that the broad pattern of convenience and comparison goods shopping behaviour revealed by the 1994 survey is unlikely to have significantly changed over the intervening period. On this basis the overall pattern of market share captured by Hereford revealed by the survey is likely to form a reasonable and reliable basis on which to consider the potential for retail floorspace over the UDP period.

Population forecasts and projections

7.18 Population estimates (1991) and projections (2001-2011) for the individual postcode areas comprising the catchment area were provided by MapInfo, based on the 1991 census.

7.19 Overall, the population forecasts indicate that between 1991 and 2001 the population of the catchment has increased by 12 630 people. For the period 2001 to 2011, population is set to rise by a further 8 635 to 228 064. The population forecasts for each postcode area are set out in Appendix 5, and summarised below at Table 2. The Council's Research Team advise that these growth rates form an accurate estimate of the likely change in population within the defined catchment over the UDP period.

Table 2 – Population growth in Hereford catchment area 2001-2011

Year	1991	2001	2006	2011
Population	206 799	219 429	224 207	228 064

Source: MapInfo illumine Report, 2001

7.20 As a result of changes in postcode areas, the base (2001) population differs slightly from that used by Hillier Parker in 1994. However, these changes have occurred in the peripheral quarters of the catchment area and so changes to the overall level of spending directed to Hereford will be insignificant.

Retail spending estimates per capita

7.21 In order to calculate retail expenditure per head, the study uses MapInfo's Illumine Report which provides detailed information on local consumer expenditure and which takes account of the socio economic characteristics of the local resident population. In these projections, the study uses MapInfo's goods based data and calculates per capita expenditure derived from MapInfo's baseline expenditure for 1995 (at 1995 prices).

7.22 On the basis of this data, average levels of retail spending within the catchment are set out at Table 3 as follows:

Table 3 – Per capita consumer spending in Hereford catchment, 1995

MapInfo sector	**Per capita spending 1995 (£), Hereford catchment**	**Per capita spending 1995 (£), UK average**
Convenience	1 231	1 225
Durable	923	917
Bulky durable	563	561
Comparison all	1 486	1 478
All retail goods	2 717	2 703

Note – figures exclude Special Forms of Trading (SFT)
Source: MapInfo Illumine Report, 2001

7.23 These figures exclude Special Forms of Trading (SFT) such as mail order as set out in MapInfo Illumine Report. This SFT includes categories such as mail order, vending machines and market / road side sales. The impact of Internet shopping or 'e-tailing' is also recognised as affecting shopping trends over the period covered by this Study. E-tailing is discussed in terms of levels of residual spending below.

Growth in available expenditure in the catchment

7.24 For forecasting future levels of spending, the study uses MapInfo's actual growth rate for convenience goods for the period 1995 to 1997 and projects this forward to 2011 using 'ultra long term' goods based growth rates which are based on data collected for the period between 1976 to 1997 (MapInfo/Data Consultancy Information Brief 99/1). For the comparison goods sector, information on growth in durable and bulky durable sector spending between 1991 and 1996 is set out in MapInfo/Data Consultancy Information Brief 98/3. Information on consumer spending growth post 1996 is only available for comparison goods as a whole (MapInfo/Data Consultancy Information Brief 99/2). These growth rates are set out in Table 4 below.

Table 4 - Forecast growth in retail spending

Sector	Growth rate pa 1995-96 (%)	Growth rate pa 1996-98 (%)	Growth rate pa 1998-2011 (%)
Convenience	0.2	0.1	0.1
Durable	4.9	5.1	3.6
Bulky durable	4.1	5.1	3.6
Comparison (all)		5.1	3.6

Source: URPI information brief 99/1, 99/2

7.25 Table 4 shows that if future expenditure mirrors long term trends (ie between 1976 and 1997), the catchment area's residents will, on average, continue to spend 0.1% more in foodstores and 3.6% more in non food stores every year.

7.26 The resulting increase in per capita spending over the period is set out at Table 5 below.

Table 5 - Changes in per capita spending 2001-2011

Sector	Per capita spending (£) 1995 prices		
	2001	**2006**	**2011**
Convenience	1 240	1 246	1 252
Durable	1 189	1 419	1 694
Bulky durable	720	859	1 025
Total durable	1 909	2 279	2 720
Total retail spend	3 149	3 525	3 972

Source: MapInfo Illumine Report/Herefordshire Council

7.27 Using these growth rates, between 2001 and 2011, expenditure within the defined catchment on all retail goods will rise by £211.9m. In terms of the individual sectors this increase in spending is set out in Table 6 below.

Table 6 - Total growth in available spending in Hereford catchment, 2001-2011

Sector	Total spending in catchment (£m) 1995 prices		
	2001	**2006**	**2011**
Convenience	272.1	278.0	282.8
Durable	260.9	318.2	386.3
Bulky durable	158.0	192.6	233.8
Comparison (all)	418.9	510.8	620.1
All retail goods	691.0	788.8	902.9

Source: MapInfo Illumine report

Market share

7.28 The allocation of spending for main food and convenience shopping goods are based on question 2 of the household survey, contained in Appendix 5. The figures for comparison durable goods shopping were based on an average of responses to question 3 regarding clothes and shoes shopping, and question 8 regarding Christmas and anniversary purchases. The figures for bulky durable goods were derived from a weighted average of the results from questions 4 to 7 inclusive of the Household Interview Survey, weighting the responses according to the amount of expenditure in each sub category.

7.29 The resulting proportions of available retail expenditure attracted to Hereford are set out in Appendix 6.

7.30 On the basis of this market share, and allowing for projected increases in per capita consumer spending and population, the resultant increase in consumer spending to Hereford for the period 2001 to 2011 is set out at Table 7 below:

Table 7 - Retail spending to Hereford, 2001-2011

Sector	Total spending to Hereford (£m)		
	2001	2006	2011
Convenience	117.0	120.8	124.1
Durable	156.3	191.3	233.3
Bulky durable	82.9	101.6	123.8
Durable (total)	239.2	292.9	357.1
All retail goods	356.2	413.7	481.2

Source: MapInfo Illumine Report / Herefordshire Council

7.31 In order to identify the need for additional shop floorspace in Hereford, the study assumes that the shopping patterns measured by the Household Interview Survey in 1994 will continue throughout the UDP period to 2011. Although this approach may be seen as too prescriptive, the catchment area of the city has evolved over a period of time and is influenced by a range of factors not just retailing.

Extant floorspace

7.32 The Retail Audit produced by Hillier Parker in 1994 assessed net retail floorspace in Hereford as comprising 33 395sqm of city centre floorspace, 15 906sqm of retail warehousing and 12 839sqm convenience floorspace as at 1996.

7.33 Since the completion of the Hillier Parker Report, the Council have undertaken a comprehensive survey of retail floorspace within Hereford and a significantly different assessment of overall retail floorspace has emerged.

7.34 This revised base floorspace information is set out in the Hereford City Retail Floorspace Monitor (June 2000). Since the production of this report the School of Farriery retail warehouse development has been completed, providing an additional 4646sqm (gross) floorspace. The other major changes have been the closure of the Kwik Save convenience store on Commercial Road (558sqm net) and the completion of the Aldi convenience store on Eign Street (1190sqm net). Allowing for these changes, the quantity and distribution of retail floorspace in Hereford is set out at Table 8. A more complete breakdown of these figures including individual store sizes is contained in Appendix 7.

Table 8 - Existing retail floorspace in Hereford (2001)

Sector	**Net Floorspace (sqm) by location**				
	City centre	**Edge of centre**	**Out of centre**	**Local centre**	**Total**
Convenience	5 456	6 980	2 246	2 453	17 136
Comparison	26 773	1 630	428	423	29743
Bulky durable	8 460	6 537	20 707	77	35 781
Service A1	1 567	747	0	379	2 693
Total	**42 256**	**16 383**	**23 381**	**3 332**	**85 353**

Source: Herefordshire Council, 2002

Turnover estimates

7.35 In order to assess current levels of spending in existing shops the first step is to establish a sales density in the base year.

7.36 In the case of convenience sector floorspace, the turnover figures per sqm for the larger national stores are based upon company averages contained in the Retail Rankings 2000, an accepted source for such information. Due to the dominance of these larger stores, average sales densities are thus available for some 82% of all convenience sector floorspace in Hereford. For smaller stores, an average turnover figure has been used that reflects the nature of convenience sector retailers in the City.

7.37 Due to the lack of company sales averages for the great majority of durable sector stores in Hereford, it was not possible to apply this differential sales densities for individual stores approach for durable sector floorspace. Thus, for the durable sector, average turnover figures were used having regard to densities evident in other towns and the nature of goods sold in these stores.

7.38 These turnover figures have been converted to 1995 prices (in line with URPI Guidance Brief 99/2). For example, URPI's price index shows that if 1995 was 100 then prices in 1997 were 105. Rolling this forward to 1999 the study assumes that the index would be 110 as inflation has remained relatively stable. To convert 1998/99 prices into 1995 prices the 1998/99 figure has been multiplied by (100/110) or 0.91.

7.39 When considering future sales densities of existing durable floorspace, it is also necessary to consider potential changes in productivity. Retailers currently present within a particular centre will be looking to improve their profitability and thereby productivity. To allow for this, the Study applies a growth rate of 1% per annum increase in productivity as applied by Hillier parker in the 1994 Retail Audit.

7.40 On the basis of these figures, the estimated turnover of retail floorspace within Hereford is set out at Tables 9, 10 and 11. Estimated sales densities for individual stores, sectors and locations are shown in Appendix 7.

Table 9 - Turnover of convenience floorspace in Hereford, 2001-2011

Location	**Turnover (£)m 1995 prices**		
	2001	**2006**	**2011**
City centre	34.69	34.69	34.69
Edge of centre	43.40	49.71	49.71
Out of centre	26.17	26.17	26.17
Total	**104.26**	**110.57**	**110.57**

Note - with allowance for Petrol sales, VAT and inflow from outside catchment
Source: Herefordshire Council, 2002

Table 10 - Turnover of durable goods floorspace in Hereford, 2001-2011

Location	**Turnover (£)m 1995 prices**		
	2001	**2006**	**2011**
City centre	120.48	131.77	138.49
Edge of centre	7.20	7.88	8.28
Out of centre	1.53	1.68	1.76
Total	**129.21**	**141.33**	**148.53**

Note – with allowance for VAT, increases in productivity and inflow from outside catchment
Source: Herefordshire Council, 2002

Table 11 - Turnover of bulky durable goods floorspace in Hereford, 2001-2011

Location	Turnover (£)m 1995 prices		
	2001	2006	2011
City centre	39.22	41.22	43.33
Edge of centre	13.47	14.16	14.88
Out of centre	42.81	45.00	47.29
Total	**95.51**	**100.38**	**105.50**

Note - with allowance for VAT, increases in productivity and inflow from outside catchment
Source: Herefordshire Council, 2001

7.41 Table 8 shows that the convenience sector has an estimated turnover of some £104.3m in 2001, rising to £110.6m by 2011 following the proposed extension of the J Sainsbury store. Tables 8 and 9 show that the turnover of durable sector floorspace is anticipated to rise from some £126.2m in 2001 to £148.5m by 2011. The bulky durable sector turnover is anticipated to rise from £95.5m in 2001 to £105.5m in 2011.

Residual spending power

7.42 The extent of future requirement is made by subtracting the estimated sales in shops in the base year from projected forecast sales. This gives a forecast of residual sales for which new floorspace will be required.

7.43 At this stage it is also relevant to consider the impact of Internet Shopping or 'e-tailing'. The study has regard to the conclusions of a comprehensive study carried out by consultants on behalf of Cheshire County Council (January 2001) and to research commissioned by Stafford Borough Council (March 2000). These studies recognise that Internet Shopping is an important consideration for the future of e-retailing. The studies predict that although the impact of e-retailing is likely to be significant in the medium to long term, it will complement rather than replace 'high street' or retail warehouse shopping. Retail analysis carried out by Verdict predicts that e-retail sales are likely to rise to 3% of all sales by 2004. Because this study forecasts up to 2011 it is important to allow for this growth in e-retail spending. Accordingly, 5% of forecast residual spending to Hereford has been deducted to allow for e-retail sales after 2006.

7.44 The extent of residual spending by sector is set out in Table 12.

Table 12 - Residual spending in Hereford, 2001-2011 (allowing for e-retail sales)

Sector	Residual spending (£)m 1995 prices				
	2001	2006		2011	
	Residual	Residual	Less 5% for e-tail sales	Residual	Less 5% for e-tail sales
Convenience	12.79	10.20	-	13.52	-
Durable	13.68	51.13	48.58	103.07	97.9

Source: Herefordshire Council, 2002

Calculation of floorspace requirement

7.45 The forecast residual spending figure for convenience and durable goods can be converted to shop floorspace through the application of an appropriate sales per sqm figure.

7.46 The study uses a range of floorspace turnover ratios, reflecting the range of average sales densities of national retail operators.

7.47 To assess the need for additional convenience floorspace, average figures for sales per sqft from food superstore operators is used, based upon the sales densities contained in the current edition of the Retail Rankings (re-based to 1995 prices).

7.48 For bulky durable floorspace a similar approach is used, reflecting prevailing turnover ratios for national multiple retail warehouse operators who are the most likely occupants of new floorspace.

7.49 For city centre durable floorspace a figure similar to the current average sales density is used. The sales densities used in the study are set out at Table 13 below.

Table 13 - Sales densities of new retail floorspace in Hereford (£sqm)

Sector	**2001**	**2006**	**2011**
City centre comparison from	4 419	4 644	4 881
City centre comparison to	4 939	5 191	5 456
Retail warehouse from	1 560	1 639	1 723
Retail warehouse to	2 080	2 186	2 297
Convenience from	7 798	8 196	8 614
Convenience to	8 838	9 289	9 763

Source: Herefordshire Council, 2002

7.50 These figures assume that 75% of growth in available expenditure should be allocated to support City Centre floorspace (allowing for 1% pa growth in City Centre sales densities). The remaining 25% would be provided by retail warehousing.

Level of retail floorspace requirements

7.51 On the basis of this study approach, the requirement for new retail floorspace is set out at Tables 14 and 15.

7.52 There will be a small quantitative need for additional convenience floorspace in Hereford to 2011.

7.53 However, there will be a need for up to some 13 459-15 045 sqm net city centre durable goods floorspace, and up to some 10 657-14 207 sqm net retail warehouse floorspace by 2011. On the basis that future trends in population and expenditure growth occur and if current shopping patterns in the catchment area continue. For the purposes of the UDP this is set out as 14-16,000sqm city centre floorspace and a further 11-15,000sqm retail warehouse floorspace.

Table 14 - Requirement for new convenience floorspace in Hereford

	2001	**2006**	**2011**
Convenience spend (£m)	117.0	120.8	124.1
Sales capacity (£m)	104.3	110.6	110.6
Residual (£m)	12.8	10.2	13.5
Sales per sqm new floorspace (£)	7 798 - 8 838	8 196 - 9 289	8 614 - 9 763
Forecast need for new floorspace	1 447 - 1 640	1 098 - 1 245	1 384 - 1 569

Source: Herefordshire Council, 2001

Table 15 - requirement for new comparison floorspace in Hereford

	2001	**2006**	**2011**
Comparison spend (£m)	156.3	191.3	233.3
Bulky comparison spend (£m)	82.9	101.6	123.8
Total spend	239.2	292.9	357.1
Sales capacity (City Centre) (£m)	129.2	141.3	148.5
Sales capacity (Retail warehouse) (£m)	95.5	100.4	105.5
Total capacity	224.7	241.7	254.0
Residual (£m) (with allowance for	13.7	48.6	97.9

Internet sales)			
Proportion for retail warehouse	25%	25%	25%
Residual spend to support new retail warehouse (£m)	3.4	12.1	24.5
Sales persqm new retail warehouse (£)	1 560 - 2 080	1 639 - 2 186	1 723 - 2 297
Forecast need for new retail warehouse floorspace (sqmnet)	1 645 - 2 193	5 555 - 7 409	10 657 - 14 207
Proportion for City Centre spend	75%	75%	75%
Residual spend to support new City Centre floorspace (£m)	10.3	36.4	73.4
Sales persqm new City Centre floorspace (£)	4 419 - 4 939	4 644 - 5 191	4 881 - 5 456
Forecast need for new City Centre floorspace (sqmnet)	2 078 - 2 322	7 018 - 7 845	13 459 - 15 045

Notes: Proportion for retail warehouse and City Centre from Hillier Parker (1998)

Key issues

7.54 a) Hereford enjoys a relatively large catchment area for a retail centre of its size. The catchment includes most of Herefordshire and extends into Monmouthshire, Powys and Gloucestershire. In terms of comparison goods, no other centre within or beyond the catchment attracts any significant proportion of expenditure generated from within the catchment area.

b) The population of the catchment is anticipated to rise by 4% to 228 064 from 2001 to 2011. However, spending on all retail goods is forecast to rise by 35% over the same period, largely driven by increased spending on durable goods (increase of 49%).

c) The capacity of existing durable goods retail floorspace is failing to satisfy current levels of spending. This is resulting in substantial leakage of spending to centres outside the catchment. This level of leakage of durable goods spending is forecast at £13.7m in 2001 and will rise to £48.6m in 2006 and £97.9m by 2011 unless additional floorspace is provided. This requirement is forecast at 2011, for the purposes of the UDP to be 14 - 16 000 sqm city centre floorspace and a further 11 - 15 000sqm retail warehouse floorspace.

d) If this level of floorspace is not provided then the great majority of the residual spending identified would be lost to large competing centres such as Worcester, Gloucester and Cheltenham. As a result, the status of Hereford within its catchment would be reduced to the detriment of the City's overall vitality and viability.

e) There will be a small quantitative need for additional convenience floorspace in Hereford to 2011.

8 COMMERCIAL DEVELOPMENT REQUIREMENTS

8.1 In this section the approach used to determine the scale of other key commercial development requirements is set out. These requirements cover cinemas, hotels and offices.

8.2 As with retail development requirements, this Section of the Paper is concerned with Hereford only. Due to its sub regional role, the concentration of other high order leisure facilities and location at the hub of the County public transport network, the demand for additional cinema and hotel development is best met in Hereford. In terms of office requirements, any significant additional demand is likely to come from the public sector and for service delivery reasons be directed to Hereford.

8.3 This section is divided into three areas. The first considers the need for additional cinema floorspace and uses an approach based upon that carried out as part of the Hampshire Structure Plan. The second element of the section summarises research undertaken by the Heart of England Tourist Board to determine the adequacy of hotel facilities in Hereford and whether the UDP should seek to make good any under provision. Finally, the third part of the Section summarises the likely requirement for office accommodation in Hereford over the UDP period.

A. Cinema requirements

8.4 The study is based upon anticipated levels of growth in patronage of cinema facilities in the UK as a whole. However, the UK cinema industry is dynamic and is subject to constant change. The forecasts of cinema requirements in Hereford have regard to local circumstances but the conclusions should be treated with some caution. The forecasts should not be used in a deterministic way, but as a guide to the future level of cinema development in Hereford that should be provided for in the UDP.

Review of relevant appeal decisions

8.5 The review of national planning policy set out at Section 2.0 provides a rigorous approach to the consideration of additional retail and commercial leisure development. However, it is important to review a number of appeal decisions to set out how this guidance should be interpreted specifically in terms of proposals for cinema development.

8.6 During 1995 an application was made to Eastleigh Borough Council in Hampshire for a nine screen multiplex cinema, two restaurants, a family entertainment centre and 623 car parking spaces at Chestnut Avenue in the town. The Borough Council resolved to approve the application, but it was called in by the Secretary of State. A local inquiry was held in 1996 and the application was subsequently refused by the Secretary of State in February 1997 contrary to the advice of his Inspector. The decision was challenged in the High Court in September 1997 on a point of law and the planning application has been referred back to the Secretary of State.

8.7 In dismissing the appeal the Secretary of State observed that the site search carried out in relation to the proposal 'seems to have concentrated on sites for multiplex development and associated leisure and car parking rather than for a smaller cinema'.

8.8 The key conclusion of the Eastleigh decision is the approach of central Government towards the 'dismemberment' of a leisure park facility. Developers are now required to demonstrate the need for all elements of the leisure park and to adopt a sequential test for those elements. For example, if the leisure park proposal includes an A3 unit, developers must be required to show there are no sites available in a more central location for that unit.

8.9 Other matters raised in recent appeal decisions relevant to cinema developments are:

- the need for development and whether the benefits override any other policy considerations

- the likely impact on the vitality and viability of existing town centres including the evening economy
- the physical suitability of the site for development of the kind proposed having regard to the advice set out in PPG6 and PPG13;
- whether sites exist within or next to nearby town centres or any other existing centre which are capable of accommodating the development proposed either in whole or in part
- the accessibility of the site by a choice of transport
- the likely effect of the proposals on overall travel patterns and car use

Current cinema provision in Hereford

8.10 Herefordshire is not well served by modern cinema facilities. There are currently two cinemas in the County, which contain 3 screens and 858 seats. These are:

Odeon cinema, Commercial Street, Hereford (1 screen, 378 seats)
Courtyard Theatre, Hereford (2 screens, 480 seats)

8.11 The Odeon cinema is a typical town centre facility and dates from the early 1960s. The Courtyard Theatre is owned by Herefordshire Council and contains one permanent screen and one temporary screen.

8.12 Within 30 miles of Hereford are 9 cinemas, containing 24 screens and 5 888 seats. Of these 9 cinemas, 5 are in traditional town centre locations. These are:

Regal Cinema, Tenbury (1 screen, 232 seats)
Warner Villages Cinema, Worcester (6 screens, 1 399 seats)
Odeon Cinema, Worcester (6 screens, 1113 seats)
Savoy Theatre, Monmouth (1 screen)
Coleford Cinema (2 screens, 208 seats)

8.13 Of the remainder, three are in arts / theatre complexes. These are:

Ludlow Assembly Rooms (1 screen, 197 seats)
Malvern Theatres, Great Malvern (1 screen, 475 seats)
Roses Theatre, Tewkesbury (1 screen, 336 seats)

Only two of the cinemas are in a multiplex format. These are:

Warner Villages Cinema, Worcester (6 screens, 1 399 seats)
Virgin Cinema, Gloucester (6 screens, 1678 seats)

8.14 Anecdotal evidence suggests that these multiplexes attract considerable patronage from Herefordshire, particularly from the southern and eastern parts of the County.

8.15 A full list of these cinema facilities and location plan is attached in Appendix 8.

Assessment of demand for additional facilities

8.16 The approach used in this study has also been used in the preparation of the Hampshire County Structure Plan review and is referred to as the ‘Hampshire Approach’.

8.17 The Hampshire approach differentiates between traditional cinemas and multiplexes. It also incorporates a growth factor in patronisation of cinemas.

8.18 This Study is based upon the following steps:

Definition of catchment area
Calculation of level of demand
Calculation of capacity of existing facilities
Residual figure
Need for additional facilities

8.19 These are set out in turn below.

Definition of catchment area

8.20 For the purpose of this Study, a 30 minute drive time has been used as the basis for the catchment area. The extent of the catchment area has been amended to recognise the influence of competing cinema facilities in the surrounding area. For this reason, the catchment extends to Hay-on-Wye to the west, but is curtailed to the east by the catchment of multiplex facilities in Worcester and Gloucester. The extent of these facilities is attached in Appendix 8.

8.21 The catchment area is based upon the postcode areas of HR1, HR2, HR3, HR4, HR5, HR6, HR7, HR8 and HR9 as shown in Appendix 10. This catchment area extends to Leominster in the north, Ross-on-Wye to the south, Ledbury to the east and Kington and Hay-on-Wye to the west. The current population of the catchment is some 161 980 (source MapInfo) and is anticipated to rise to 166 418 by 2006 and to 170 285 by 2011. A detailed breakdown of this population by postcode area is contained in Appendix 9.

Calculation of level of demand

8.22 The Hampshire study used a figure of 2.5 cinema visits per capita per annum for 1997, rising to 4.5 visits per capita per annum for 2001. This growth in patronage is based upon empirical evidence collected by Portsmouth City Council on actual usage of all Hampshire cinemas. These figures are similar to actual levels of usage across the UK as a whole collected by the domestic cinema industry.

8.23 For the purpose of this study, the rates of 2.5 visits per capita per annum rising to 4.0 visits per capita per annum will be used. This assumes that levels of patronage in Herefordshire are not at the same magnitude as a more urbanised County such as Hampshire, which is served by better road links. For requirements after 2001, the Study will continue to use the figure of 4.0 visits per capita per annum. This recognises that the continued growth in patronage may not be sustainable in the long term. The level of demand using this approach is set out in Table 16 below.

Table 16 - Level of demand for cinema seats in Hereford catchment area 1999-2011 (Hampshire approach)

	2001	**2006**	**2011**
Population of catchment	161 980	166 418	170 285
No. of visits (per annum)	647 920	665 672	681 140

Source: Herefordshire Council, 2002

Calculation of existing capacity

8.24 The catchment area is currently served by two cinema facilities. Information collected as part of the Hampshire Study identified patronage in the region of 40 000 visits per annum for a traditional town centre cinema (ie more than one screen). However, because of the small scale of the facilities in the catchment, actual usage is likely to be substantially less than this. An aggregate figure of between 25 000-30 000 for all facilities is likely to be more realistic. This level of patronage is based upon information collected from the cinemas direct, but because of commercial confidentiality; this figure has been apportioned equally to two Hereford cinemas.

Calculation of residual figure

8.25 The residual figure is the difference between the number of screens currently provided and that level of screens generated by the population of the catchment. It represents the quantity of new screens that should be provided by facilities within the catchment to meet current and anticipated future levels of demand.

8.26 The Hampshire approach is based upon calculating this requirement in terms of multiplex cinema facilities. The Study assumes that multiplex cinemas (containing 5 screens or more) will attract 81 000 visits per screen based on an average seat to screen ratio of 250:1. Using this approach, the requirement for additional cinema facilities in Hereford is set out in Table 17 below.

Table 17 - Need for additional cinema screens in Hereford 1999-2011 (Hampshire approach)

	2001	**2006**	**2011**
Population of catchment	161 980	166 418	170 285
Visits pa (4.0 for 2001-2011)	647 920	665 672	681 140
Minus visits to existing cinemas (30 000pa)	617 920	635 672	651 140
No. additional screens that can be justified (81 000 visits per screen)	7.6	7.9	8.0

Source: Herefordshire Council, 2002

8.27 This table shows that only 4.6% of demand for cinema screens in the Hereford catchment area is currently met by facilities in the City Centre. It is uncertain whether this level of patronage will remain constant over the UDP period. It is possible that groups without access to a car cannot visit cinemas outside the catchment area and will continue to use Hereford. However, in the absence of further investment in Hereford, the predicted increase in patronage generated by the catchment is likely to be met by modern multiplex facilities outside Hereford.

8.28 Using this approach, there is a demand for a further 8 screens in Hereford by 2011. This number of screens is in addition to current level of provision.

Views of cinema operators

8.29 Individual cinema operators have different requirements but there are clear common features. All operators seek high quality, highly visible well located sites with quality schemes catering for customer comfort becoming increasingly important. Some operators will not consider multiplexes of less than 12 screens with 12 to 16 screens becoming the optimum size. Other operators are becoming more flexible to secure market share and see 6 to 8 screens as being appropriate for town centre sites providing the centre has a catchment population of at least 150 000 within a 20 minute drive time.

8.30 In terms of plot and building sizes, a six screen cinema of 250 seats per screen would normally require a single storey building with a footprint of between 2 700 sqm and 3 600sqm (between 30 000sqft and 38 700sqft). In town centre locations where sites are constrained, operators may consider two storey buildings. Sites of around 0.2ha (0.5 acres) may accommodate a cinema of this type.

8.31 Normally, operators require dedicated surface car parking adjacent to the cinema. However, in town centre locations, developers may accept s106 agreements that require them to secure late night opening of nearby car parks.

B Requirement for hotel facilities

8.32 In November 2000 the Heart of England Tourist Board (HETB) was commissioned by the Herefordshire Council to undertake an assessment of Hereford future tourism accommodation requirements.

Study approach

8.33 The study area for Hereford encompassed the central urban area, plus three surrounding suburban wards of Holmer, Lower Bullingham and Belmont.

8.34 The study considers supply and demand issues for the following accommodation sectors: Hotel, Guest, Self Catering and Caravan and Camping sites.

Supply

8.35 In terms of identifying Hereford's current accommodation stock, a detailed search of HETB's TRIPS database was carried out, backed up by analysis of Herefordshire Tourism publications. The analysis identified;

establishment numbers
numbers of bedspaces, units and pitches
numbers/proportions of ensuite bathrooms
quality grading of accommodation
levels of participation in the National Accessible Scheme
parking capacity
largest conference/meeting capacities of establishments
benchmarking of stock size/breakdown with peer group urban destinations i.e. areas of comparable resident populations and/or tourism products and markets.

Need/Demand

8.36 Sources of need/demand information for the study included;

Analysis and comparison of current accommodation occupancy trends
Analysis of local, regional and national market/visitor research
Desk based research on the conference/meetings sector, followed up by telephone interviews with selected conference/meeting agencies who have previously expressed an interest in Hereford as a conference/meeting destination
A telephone survey of all accommodation businesses in Hereford, gaining perceptions on the sector's performance
A telephone survey of major local businesses generating business for accommodation establishments
Meetings/consultations/telephone interviews with key agencies and groups i.e. Association for the Promotion of Herefordshire (APH), Herefordshire Partnership, Business Link, Tourism Information Centre's etc
Use of Herefordshire Tourism's 'Tourism Matters' publication to gain industry feedback on issues affecting the accommodation sector.
Standardised questionnaires were designed for the telephone surveys.

Recommendations of the Study

8.37 After an analysis of the above information a set of summary conclusions were provided in the report which identified current gaps in supply, the levels of demand for different sectors, and recommendations on where potential may lie for future development.

Hotel Accommodation

8.38 In terms of hotel accommodation, the City's stock was recognised as fulfilling a key role in the overall tourism product, with conference and business tourism concentrated around these facilities. Discussions with local businesses, tourism operators and other agencies identified a general perception that the City suffered from a lack of good quality hotel accommodation with sufficient conference capacity, particularly in the central area

8.39 However, after assessing supply, need and demand, for provision of a further hotel in Hereford the HETB's overall recommendation was that the present, levels of visitor/sectoral demand did not warrant significant additional hotel/conference capacity.

8.40 It is also worth noting that an analysis of development criteria and conversations with hotel companies both indicated that Hereford would probably have difficulty in attracting a good quality, mid-market branded hotel with conferencing facilities to site in the City. Most hotel operators use large business and population catchments as key site selection criteria. These are characteristics that Hereford does not benefit from, compared to some other urban destinations. In light of this Hereford was not generally regarded as being in the list of primary locations in companies' future development plans

8.41 Future potential is expected to lie in the expansion and upgrading of existing establishments, enabling them to provide facilities which meet with market demand. The UDP will therefore have a role to play in enabling hotel extensions of suitable scales to be brought forward where appropriate.

Bed & Breakfast accommodation

8.42 The study concluded that B&B and guesthouse accommodation provides an important component of overall accommodation provision in urban areas and that guest accommodation establishments traditionally provide for both leisure and business tourism markets.

8.43 A gap in supply was identified, certainly in central areas, for good quality, value for money guest accommodation. Research undertaken for the study indicated that visitor choice was limited and this was used to explain one of the reasons why levels of demand were not as high as they could potentially be.

8.44 In addition the study identified that opportunities existed for upgrading the quality of existing establishments.

8.45 The role of planning polices in highlighting potential opportunities, and enabling appropriately located, good quality guest accommodation to be brought forward when business opportunities existed was also identified.

Self-catering accommodation

8.46 Research suggested that levels of existing supply of self catering accommodation appeared sufficient for an urban area of Hereford's size. The HETB identified that in terms of future development opportunities, self-catering provision in the City needed largely to be viewed as a niche product. However, the report explains that individual opportunities may be available. For example, the re-use of the upper floors of some urban properties may offer potential for a small number of operators. Youth Hostel type accommodation could also be regarded as a sub-sector of self-catering provision and may offer some development opportunities

Camping and caravanning

8.47 The City has one major site, located at Hereford Racecourse. This level of provision is in line with that provided elsewhere in urban areas in the region.

8.48 The report concluded that if the development of any major new caravan and camping provision for visitor touring traffic was to be considered, a clear demand case would need to be demonstrated in the light of a wider rural catchment. Full research for the County as a whole has yet to be carried out, however, initial impressions were that supply is relatively plentiful.

C. Office requirements

8.49 Hereford City Centre's office market is dominated by the public sector, including Herefordshire Council, the Health Authority, West Mercia Police and Magistrates Courts. The private sector office market is limited, and largely restricted to small to medium sized local/regional firms servicing the County. Because of its relative isolation from the major office centres of the region, large scale speculative development in offices is likely to continue to remain modest across the UDP period.

8.50 However, to assist in improving the efficiency and effectiveness of service delivery, Herefordshire Council is seeking to establish a high profile central headquarters within the City. It is estimated that between 16 700sqm (180 000sqft) and 20 400sqm (220 000sqft) of floorspace will be required for this purpose over the UDP period.

Key issues

8.51 a) Hereford is a poorly served by modern cinema facilities. Of the estimated 394 500 cinema visits generated by the catchment area in 1999, only around 30 000 are anticipated to be met by cinemas in Hereford.

b) There is considerable leakage of cinema patronage from Hereford to more modern multiplex facilities in Gloucester and Worcester.

c) In the absence of investment in Hereford, the extent of leakage has been exacerbated by the opening of additional multiplex facilities in Worcester.

d) In terms of assessing demand, the study has shown there exists demand for a further 6 - 8 screens in Hereford by 2011.

e) If a town centre site were to be identified, an area of around 0.2ha (0.5 acres) could accommodate a six screen cinema of 4 260sqm (45 454sqft) on a two storey basis. On other sites, typically a building footprint of between 2 700sqm and 3 600sqm (30 000sqft to 40 000 sqft) could accommodate a cinema with this number of screens on a single storey basis.

f) The HETB and local business community advise that Hereford is poorly served by modern high quality hotel and conference facilities.

g) The research carried out by HETB recommends that levels of visitor/sectoral demand do not warrant significant additional hotel/conference capacity to be provided for as an allocation in the UDP.

h) There is little demand for extensive private sector office development in Herefordshire of a scale that warrants an allocation in the UDP.

i) Herefordshire Council is likely to require office space in the order of 16 700sqm to 20 400sqm over the UDP period.

9 SUMMARY OF KEY ISSUES AND RECOMMENDATIONS

9.1 Central government guidance

- Central Government Guidance contained in PPG6 and PPG13 advises that development plans should adopt a plan led approach to providing retail, leisure and other town centre uses
- The UDP establishes a hierarchy of centres as the basis for identifying the most sustainable locations for additional town centre travel intensive development
- UDP allocations and policies that promote new development have been based upon consideration of need and adopt a sequential approach to site selection

9.2 Hierarchy of centres

- A three tier hierarchy of centres has been identified in the UDP. Hereford is confirmed as the sub regional centre with the five market towns providing an ancillary role. The third tier is formed by a network of larger villages serving a rural hinterland. In addition to this are the local neighbourhood centres identified around Hereford City.

9.3 Town centre boundaries

- The UDP contains a set of Town Centre Central Shopping and Commercial Area (CSCA) boundaries for Hereford and the market towns that are based upon common criteria. CSCA boundaries are an important and well utilised planning tool to provide a focus for retail, leisure and other town centre development.

9.4 Managing the diversity of uses

- The UDP identifies a set of primary and secondary frontages based upon common criteria for Hereford and the market towns in order to protect the primary retail function and allow appropriate levels of ancillary A2 and A3 uses.

9.5 Retail requirements

- Hereford benefits from a relatively large catchment area for a retail centre of its size.
- The capacity of existing durable goods retail floorspace is failing to satisfy current levels of spending. This is resulting in substantial leakage of spending to centres outside the catchment. In order to make good this leakage and retain Herefords position within its catchment, some 14-16 000 sqm city centre floorspace and a further 11-15 000sqm retail warehouse floorspace will be required over the UDP period.
- There is small quantitative need for additional convenience sector floorspace in Hereford during the UDP period.

9.6 Cinema requirements

- Hereford is poorly served by modern cinema facilities resulting in substantial leakage of patronage to more modern facilities outside the County. In order to claw back this leakage a cinema providing some six to eight screens will be required over the UDP period.

9.7 Hotel requirements

- The research carried out by HETB recommends that levels of visitor/sectoral demand do not warrant significant additional hotel/conference capacity to be provided for as an allocation in the UDP.

9.8 Office requirements

- There is little demand for extensive private sector office development in Herefordshire of a scale that warrants an allocation in the UDP.
- Herefordshire Council is likely to require office space in the order of 16 700sqm to 20 400sqm over the UDP period.

Appendix 1 - Level of facilities within individual centres

	rank shops	rank A3	rank other services	rank population	total score
Hereford	1	1	1	1	**4**
Ross on Wye	2	2	3	3	**10**
Leominster	3	4	2	2	**11**
Ledbury	4	3	4	4	**15**
Bromyard	6	5	6	5	**22**
Kington	5	6	5	6	**22**
Colwall	7	7	7	7	**28**
Weobley	8	8	10	17	**43**
Bartestree & Lugwardine	18	10	13	9	**50**
Cradley	18	10	13	10	**51**
Ewyas Harold	10	10	7	29	**56**
Kingsland	14	9	13	20	**56**
Pembridge	9	10	13	26	**58**
Leintwardine	10	10	7	32	**59**
Peterchurch	13	17	10	22	**62**
Kingstone	18	17	13	16	**64**
Credenhill	14	30	13	8	**65**
Bodenham	14	30	8	19	**71**
Marden	14	30	13	14	**71**
Fownhope	18	17	13	24	**72**
Orleton	24	10	13	27	**74**
Withington	18	30	13	13	**74**
Eardisley	12	17	13	36	**78**
Madley	24	30	13	18	**85**
Wellington	34	17	13	21	**85**
Bosbury	24	17	13	34	**88**
Whitchurch	24	30	13	23	**90**
Coughton (Walford)	34	30	13	15	**92**
Shobdon	18	30	13	31	**92**
Bishops Frome	24	17	13	40	**94**
Whitbourne	24	30	13	30	**97**
Goodrich	24	17	13	44	**98**
Wigmore	24	17	13	45	**99**
Brimfield	34	17	13	37	**101**
Clehonger	48	30	13	11	**102**
Eardisland	24	17	13	48	**102**
Weston u Penyard	48	10	13	33	**104**
Sutton St Nicholas	34	30	13	28	**105**
Canon Pyon	34	17	13	43	**107**
Dilwyn	34	30	13	35	**112**
Much Dewchurch	24	30	13	46	**113**
Staunton on Wye	34	17	13	50	**114**
Lea	34	30	13	38	**115**
Lyonshall	34	30	13	39	**116**
Luston	34	30	13	41	**118**
Almeley	34	30	13	42	**119**
Moreton on Lugg	34	49	13	25	**121**
Burghill	48	49	13	12	**122**
Tarrington	34	30	13	47	**124**
Little Dewchurch	34	30	13	49	**126**
Cusop	48	49	13	51	**161**

Appendix 2 – Geographical extract of Hereford catchment area

This Appendix is only available in paper form and can be viewed in the appropriate Background Paper at the deposit locations including the Town hall Hereford. The full versions of the Background Papers can also be purchased from: The Forward Planning Section, PO Box 144, Hereford. HR1 2YH. Please contact 01432 260142 to place your order and cost of the document.

Appendix 3 – Hereford Shopping survey results 1994

This Appendix is only available in paper form and can be viewed in the appropriate Background Paper at the deposit locations including the Town hall Hereford. The full versions of the Background Papers can also be purchased from: The Forward Planning Section, PO Box 144, Hereford. HR1 2YH. Please contact 01432 260142 to place your order and cost of the document.

Appendix 4 – Hereford Catchment Area by Sector

Hereford Retail share by sector

postcode	Attraction of spending to Hereford (central and non-central) (percent)		
	Convenience goods	**Comparison durable goods**	**Bulky durable goods**
HR1 1	84	80	89
HR1 2	96	74	93
HR1 3	52	66	79
HR1 4	84	82	82
HR2 0	96	66	77
HR2 6	100	78	91
HR2 7	96	88	94
HR2 8	84	70	78
HR2 9	96	80	95
HR9 5	4	34	36
HR9 6	16	50	34
HR9 7	0	36	20
HR4 0	96	84	88
HR4 7	100	84	89
HR4 8	48	78	78
HR4 9	96	84	80
NP7, 5, 6, 7, 8	0	4	0
LD3	16	34	18
LD2	16	54	24
HR3	24	68	62
HR5	16	62	41
NP5 2	0	8	1
NP5 3	0	16	8
NP5 4	8	6	11
HR8 1	12	52	35
HR8 2	8	50	48
HR6 0	12	54	51
HR6 8	0	62	34
HR6 9	8	58	43
HR7 4	32	56	49

SOURCE : household interview survey

Appendix 5 - Population Growth to 2011

postcode	population 1991	population 1997	change 1991-97	annual growth (%)	population 2001	change 1997-2001	annual growth (%)	population 2006	change 2001-06	annual growth (%)	population 2011
hr1 1	13,413	12,510	-903	-0.011	13,632	1,122	0.022	14,010	378	0.006	14,342
hr1 2	4,363	3,987	-376	-0.014	4,757	770	0.048	4,889	132	0.006	5,005
hr1 3	5,772	6,385	613	0.018	6,375	-10	0.000	6,551	176	0.006	6,707
hr1 4	4,855	5,369	514	0.018	5,234	-135	-0.006	5,379	145	0.006	5,506
hr2 0	3,812	3,703	-109	-0.005	4,013	310	0.021	4,124	111	0.006	4,222
hr2 6	7,085	7,241	156	0.004	7,463	222	0.008	7,669	206	0.006	7,851
hr2 7	11,716	12,241	525	0.007	12,732	491	0.010	13,085	353	0.006	13,396
hr2 8	4,070	3,978	-92	-0.004	4,200	222	0.014	4,317	117	0.006	4,419
hr2 9	5,944	7,020	1,076	0.030	6,506	-514	-0.018	6,687	181	0.006	6,845
hr3 5	3,547	3,806	259	0.012	3,996	190	0.012	4,063	67	0.003	4,090
hr3 6	2,524	2,515	-9	-0.001	2,635	120	0.012	2,708	73	0.006	2,772
hr4 0	10,680	9,693	-987	-0.015	10,951	1,258	0.032	11,255	304	0.006	11,522
hr4 7	5,950	6,029	79	0.002	6,312	283	0.012	6,487	175	0.006	6,641
hr4 8	5,528	6,289	761	0.023	6,035	-254	-0.010	6,202	167	0.006	6,349
hr4 9	5,385	5,428	43	0.001	5,973	545	0.025	6,138	165	0.006	6,284
hr5 3	4,139	4,245	106	0.004	4,371	126	0.007	4,486	115	0.005	4,583
hr6 0	5,914	6,149	235	0.007	6,251	102	0.004	6,424	173	0.006	6,577
hr6 8	7,263	7,784	521	0.012	7,811	27	0.001	8,027	216	0.006	8,218
hr6 9	4,805	4,912	107	0.004	4,986	74	0.004	5,124	138	0.006	5,245
hr7 4	5,407	6,122	715	0.022	6,048	-74	-0.003	6,216	168	0.006	6,363
hr8 1	3,711	3,915	204	0.009	3,951	36	0.002	4,060	109	0.006	4,155
hr8 2	7,252	7,879	627	0.014	7,759	-120	-0.004	7,974	215	0.006	8,163
hr9 5	6,444	6,591	147	0.004	6,776	185	0.007	6,964	188	0.006	7,129
hr9 6	4,490	4,616	126	0.005	4,667	51	0.003	4,796	129	0.006	4,910
hr9 7	7,815	8,419	604	0.013	8,546	127	0.004	8,783	237	0.006	8,991
ld2 3	5,738	6,384	646	0.019	6,199	-185	-0.007	6,283	84	0.003	6,296
ld3 0	4,896	5,169	273	0.009	5,164	-5	0.000	5,234	70	0.003	5,245
ld3 7	4,679	4,635	-44	-0.002	4,713	78	0.004	4,777	64	0.003	4,787
ld3 8	4,128	4,301	173	0.007	4,282	-19	-0.001	4,340	58	0.003	4,351
ld3 9	5,026	5,329	303	0.010	5,227	-102	-0.005	5,298	71	0.003	5,309
np15 2	2,746	2,838	92	0.006	2,895	57	0.005	2,893	-2	0.000	2,885
np25 3	3,675	4,021	346	0.016	4,180	159	0.010	4,180	0	0.000	4,172
np25 4	4,406	4,256	-150	-0.006	4,488	232	0.014	4,485	-3	0.000	4,474
np25 5	3,278	3,322	44	0.002	3,503	181	0.014	3,509	6	0.000	3,508
np7 5	3,727	4,018	291	0.013	3,786	-232	-0.014	3,783	-3	0.000	3,773
np7 6	5,237	5,729	492	0.016	5,522	-207	-0.009	5,518	-4	0.000	5,504
np7 7	5,262	5,521	259	0.008	5,326	-195	-0.009	5,329	3	0.000	5,316
np7 8	2,117	2,043	-74	-0.006	2,164	121	0.015	2,160	-4	0.000	2,159
TOTAL	**206,799**	**214,392**	**7,593**	**0.61**	**219,429**	**5,037**	**0.59**	**224,207**	**4,778**	**0.44**	**228,064**

Appendix 6 - Retail expenditure attached to Hereford

This Appendix is only available in paper form and can be viewed in the appropriate Background Paper at the deposit locations including the Town hall Hereford. The full versions of the Background Papers can also be purchased from: The Forward Planning Section, PO Box 144, Hereford. HR1 2YH. Please contact 01432 260142 to place your order and cost of the document.

Appendix 7 - Floorspace and estimated sales densities in Herefordshire

This Appendix is only available in paper form and can be viewed in the appropriate Background Paper at the deposit locations including the Town hall Hereford. The full versions of the Background Papers can also be purchased from: The Forward Planning Section, PO Box 144, Hereford. HR1 2YH. Please contact 01432 260142 to place your order and cost of the document.

Appendix 8 - Cinema facilities

Herefordshire Catchment - cinema screen provision

Town	Distance to Hereford (miles)	Operator	Existing screens	Existing seats	Committed Screens (seats)	Proposed Screens (seats)
Hereford	na	Odeon (ABC)	1	378		
		Courtyard (HCouncil)	2	480		
Ludlow	21	Assembly Rooms (S Shropshire DC)	1	197		
Shrewsbury	39	Shrewsbury Film Theatre	1	100		
		Cineworld	8	1435		
Telford	56	UCI	10	2080		
Bridgnorth	41	Majestic	3	500		
Tenbury	22	Regal Cinema 1	1	232		
Great Malvern	21	Malvern Theatres	1	475		
Worcester	25	Odeon	6	1113		
	25	Warner Villages	6	1399		
Tewkesbury	29	Roses Theatre	1	336		
Gloucester	27	Virgin	6	1678		2 schemes proposed
		Guildhall	2	300		
Cheltenham	32	Odeon	7	1000		
Coleford	24	Private	2	208		
Monmouth	18	Savoy Theatre				
Newport	41	Virgin	13	2863		5 schemes proposed
Pontypool	38	Scala				
Cwmbran	40	Scene Cinemas				
Brecon	38	Colisseum	2			
Builth Wells	37	Wyeside Arts Centre	1	200		
TOTAL			**74**	**14974**		

Appendix 9 - Population projections by postcode

Hereford Cinema catchment - population

Postcode	y1991	y1994	y1996	y1997	y1998	y1999*	y2000	y2001	y2002	y2003	y2004	y2005	y2006	y2007	y2008	y2009	y2010	y2011
HR1 1	11868	12010	12106	12196	12288	12380	12472	12565	12652	12740	12828	12917	13006	13081	13156	13231	13306	13383
HR1 2	4363	4415	4450	4484	4517	4551	4585	4619	4651	4684	4716	4749	4781	4809	4836	4864	4892	4920
HR1 3	6188	6262	6312	6359	6407	6455	6503	6552	6597	6643	6689	6735	6782	6820	6859	6899	6938	6978
HR1 4	5833	5903	5950	5994	6039	6084	6130	6176	6219	6262	6305	6349	6392	6429	6466	6503	6540	6577
HR2 0	4095	4144	4177	4208	4240	4272	4303	4336	4366	4396	4426	4457	4488	4513	4539	4565	4591	4618
HR2 6	7782	7875	7938	7997	8057	8117	8178	8239	8296	8354	8412	8470	8528	8577	8626	8676	8725	8775
HR2 7	9942	10061	10141	10217	10294	10371	10448	10526	10599	10672	10746	10821	10896	10958	11021	11084	11147	11211
HR2 8	3373	3413	3441	3466	3492	3518	3545	3571	3596	3621	3646	3671	3697	3718	3739	3760	3782	3803
HR2 9	7462	7551	7612	7669	7726	7784	7842	7901	7955	8010	8066	8122	8178	8224	8272	8319	8366	8414
HR9 5	6310	6386	6436	6485	6533	6582	6631	6681	6727	6774	6820	6868	6915	6955	6995	7035	7075	7115
HR9 6	4352	4404	4439	4472	4506	4540	4574	4608	4640	4672	4704	4737	4769	4797	4824	4852	4879	4907
HR9 7	8087	8184	8249	8311	8373	8436	8499	8562	8622	8681	8741	8802	8863	8913	8964	9016	9067	9119
HR4 0	11114	11247	11337	11422	11507	11593	11680	11767	11849	11931	12013	12096	12180	12250	12320	12390	12461	12532
HR4 7	5923	5994	6042	6087	6132	6178	6225	6271	6314	6358	6402	6446	6491	6528	6566	6603	6641	6679
HR4 8	5548	5614	5659	5702	5744	5787	5830	5874	5915	5956	5997	6038	6080	6115	6150	6185	6220	6256
HR4 9	5366	5430	5474	5515	5556	5597	5639	5681	5721	5760	5800	5840	5881	5914	5948	5982	6016	6051
NP7 5,6,7,8	16363	16559	16691	16816	16942	17068	17196	17325	17445	17565	17687	17809	17932	18035	18138	18242	18346	18451
LD3	17721	17933	18076	18211	18348	18485	18623	18762	18892	19023	19155	19287	19421	19532	19644	19756	19869	19983
LD2	5119	5180	5222	5261	5300	5340	5380	5420	5457	5495	5533	5571	5610	5642	5674	5707	5739	5772
HR3	5864	5934	5982	6026	6071	6117	6163	6209	6252	6295	6338	6382	6426	6463	6500	6537	6575	6612
HR5	4030	4078	4111	4142	4173	4204	4235	4267	4296	4326	4356	4386	4417	4442	4467	4493	4518	4544
NP5 2	2746	2779	2801	2822	2843	2864	2886	2907	2928	2948	2968	2989	3009	3027	3044	3061	3079	3096
NP5 3	8467	8568	8637	8701	8766	8832	8898	8965	9027	9089	9152	9215	9279	9332	9386	9439	9493	9548
NP5 4	2951	2986	3010	3033	3055	3078	3101	3124	3146	3168	3190	3212	3234	3253	3271	3290	3309	3328
HR8 1	2977	3013	3037	3059	3082	3105	3129	3152	3174	3196	3218	3240	3263	3281	3300	3319	3338	3357
HR8 2	7722	7814	7877	7936	7995	8055	8115	8176	8232	8289	8347	8404	8463	8511	8560	8609	8658	8707

HR6 0	4592	4647	4684	4719	4754	4790	4826	4862	4896	4929	4964	4998	5032	5061	5090	5119	5149	5178
HR6 8	7991	8087	8151	8212	8274	8335	8398	8461	8519	8578	8637	8697	8757	8808	8858	8909	8960	9011
HR6 9	4939	4998	5038	5076	5114	5152	5190	5229	5265	5302	5339	5376	5413	5444	5475	5506	5538	5569
HR7 4	5557	5624	5668	5711	5754	5797	5840	5884	5924	5965	6007	6048	6090	6125	6160	6195	6231	6266
TOTAL	204645	207095	208747	210309	211882	213467	215063	216672	218171	219681	221201	222732	224273	225556	226846	228144	229449	230761

source - Hillier Parker 1994
*y1999 figure interpolated by Herefordshire Council on the basis of growth rate for period 1991-94

population growth rate - 1991 to 1996 = 0.399%pa, 1996 to 2001 = 0.748%pa, 2001 to 2006 = 0.692%pa, 2006 to 2011 = 0.448%pa
extent of population growth is derived from the Data Consultancy Illumine Report 24.2.99 for Herford 10 minute drive time

Hereford catchment population growth

Postcode	y1991	y1994	y1996	y1997	y1998	y1999*	y2000	y2001	y2002	y2003	y2004	y2005	y2006	y2007	y2008	y2009	y2010	y2011
HR1 1	11868	12010	12106	12196	12288	12380	12472	12565	12652	12740	12828	12917	13006	13081	13156	13231	13306	13383
HR1 2	4363	4415	4450	4484	4517	4551	4585	4619	4651	4684	4716	4749	4781	4809	4836	4864	4892	4920
HR1 3	6188	6262	6312	6359	6407	6455	6503	6552	6597	6643	6689	6735	6782	6820	6859	6899	6938	6978
HR1 4	5833	5903	5950	5994	6039	6084	6130	6176	6219	6262	6305	6349	6392	6429	6466	6503	6540	6577
Total-HR1	**28252**	**28590**	**28818**	**29033**	**29251**	**29470**	**29690**	**29912**	**30119**	**30329**	**30538**	**30750**	**30961**	**31139**	**31317**	**31497**	**31676**	**31858**
HR2 0	4095	4144	4177	4208	4240	4272	4303	4336	4366	4396	4426	4457	4488	4513	4539	4565	4591	4618
HR2 6	7782	7875	7938	7997	8057	8117	8178	8239	8296	8354	8412	8470	8528	8577	8626	8676	8725	8775
HR2 7	9942	10061	10141	10217	10294	10371	10448	10526	10599	10672	10746	10821	10896	10958	11021	11084	11147	11211
HR2 8	3373	3413	3441	3466	3492	3518	3545	3571	3596	3621	3646	3671	3697	3718	3739	3760	3782	3803
HR2 9	7462	7551	7612	7669	7726	7784	7842	7901	7955	8010	8066	8122	8178	8224	8272	8319	8366	8414
Total-HR2	**32654**	**33044**	**33309**	**33557**	**33809**	**34062**	**34316**	**34573**	**34812**	**35053**	**35296**	**35541**	**35787**	**35990**	**36197**	**36404**	**36611**	**36821**
HR3	**5864**	**5934**	**5982**	**6026**	**6071**	**6117**	**6163**	**6209**	**6252**	**6295**	**6338**	**6382**	**6426**	**6463**	**6500**	**6537**	**6575**	**6612**
HR4 0	11114	11247	11337	11422	11507	11593	11680	11767	11849	11931	12013	12096	12180	12250	12320	12390	12461	12532
HR4 7	5923	5994	6042	6087	6132	6178	6225	6271	6314	6358	6402	6446	6491	6528	6566	6603	6641	6679
HR4 8	5548	5614	5659	5702	5744	5787	5830	5874	5915	5956	5997	6038	6080	6115	6150	6185	6220	6256
HR4 9	5366	5430	5474	5515	5556	5597	5639	5681	5721	5760	5800	5840	5881	5914	5948	5982	6016	6051
Total-HR4	**27951**	**28285**	**28512**	**28726**	**28939**	**29155**	**29374**	**29593**	**29799**	**30005**	**30212**	**30420**	**30632**	**30807**	**30984**	**31160**	**31338**	**31518**
HR5	**4030**	**4078**	**4111**	**4142**	**4173**	**4204**	**4235**	**4267**	**4296**	**4326**	**4356**	**4386**	**4417**	**4442**	**4467**	**4493**	**4518**	**4544**

HR6 0	4592	4647	4684	4719	4754	4790	4826	4862	4896	4929	4964	4998	5032	5061	5090	5119	5149	5178
HR6 8	7991	8087	8151	8212	8274	8335	8398	8461	8519	8578	8637	8697	8757	8808	8858	8909	8960	9011
HR6 9	4939	4998	5038	5076	5114	5152	5190	5229	5265	5302	5339	5376	5413	5444	5475	5506	5538	5569
Total-HR6	**17522**	**17732**	**17873**	**18007**	**18142**	**18277**	**18414**	**18552**	**18680**	**18809**	**18940**	**19071**	**19202**	**19313**	**19423**	**19534**	**19647**	**19758**
HR7 4	**5557**	**5624**	**5668**	**5711**	**5754**	**5797**	**5840**	**5884**	**5924**	**5965**	**6007**	**6048**	**6090**	**6125**	**6160**	**6195**	**6231**	**6266**
HR8 1	2977	3013	3037	3059	3082	3105	3129	3152	3174	3196	3218	3240	3263	3281	3300	3319	3338	3357
HR8 2	7722	7814	7877	7936	7995	8055	8115	8176	8232	8289	8347	8404	8463	8511	8560	8609	8658	8707
Total-HR8	**10699**	**10827**	**10914**	**10995**	**11077**	**11160**	**11244**	**11328**	**11406**	**11485**	**11565**	**11644**	**11726**	**11792**	**11860**	**11928**	**11996**	**12064**
HR9 5	6310	6386	6436	6485	6533	6582	6631	6681	6727	6774	6820	6868	6915	6955	6995	7035	7075	7115
HR9 6	4352	4404	4439	4472	4506	4540	4574	4608	4640	4672	4704	4737	4769	4797	4824	4852	4879	4907
HR9 7	8087	8184	8249	8311	8373	8436	8499	8562	8622	8681	8741	8802	8863	8913	8964	9016	9067	9119
Total-HR9	**18749**	**18974**	**19124**	**19268**	**19412**	**19558**	**19704**	**19851**	**19989**	**20127**	**20265**	**20407**	**20547**	**20665**	**20783**	**20903**	**21021**	**21141**
TOTAL	**151278**	**153088**	**154311**	**155465**	**156628**	**157800**	**158980**	**160169**	**161277**	**162394**	**163517**	**164649**	**165788**	**166736**	**167691**	**168651**	**169613**	**170582**

population growth rate - 1991 to 1996 = 0.399%pa, 1996 to 2001 = 0.748%pa, 2001 to 2006 = 0.692%pa, 2006 to 2011 = 0.448%pa
extent of population growth is derived from the Data Consultancy Illumine Report 24.2.99 for Herford 10 minute drive time