

Drivers Jonas Deloitte.

Herefordshire Council

Herefordshire Town Centres
PPS4 Assessments

Paper 3. Catchment Population
Profile and Shopping Patterns

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1 Scope of Paper

- 1.1 In accordance with the Consultants' Brief dated June 2007, this is one of five Papers to form part of the evidence base supporting retail and town centre policies within the Herefordshire Local Development Framework (LDF). The majority of the technical work and surveys were undertaken in Autumn 2007. Any subsequent updates are referenced as such in the reports.
- 1.2 This paper provides an overview of the population profile of the Study Area and seven sub-zones - see Study Area Plan (Appendix 1). Based on Experian Demographic Reports, the first section provides demographic information for the Study Area and Zones with specific emphasis on age, socio-economic grade, tenure, economic activity and car ownership.
- 1.3 The second part of this paper analyses the results of telephone shopper interview surveys undertaken in Herefordshire in November 2007. The analysis identifies shopping patterns for the Study Area seven Zones.
- 1.4 The seven Zones were defined using postcode sector boundaries to define likely catchment areas for Hereford City and the five market towns. Zone 1 has been further subdivided into Zone 1A and Zone 1B to differentiate between residents of the City (Zone 1A) and those living within its rural hinterland (Zone 1B).
- 1.5 Zone 1A covers those postal sectors that comprise the built-up area of Hereford City. Although it extends some distance south of the City (because of post-code boundaries), there are few residents within this area beyond the built-up area of the City.
- 1.6 Zone 1B covers a large area of rural Herefordshire surrounding Hereford City. It extends as far as the Welsh border in the south west, but contains no key retail centres of significant size, and residents are clearly dependent upon Hereford City for most retail purchases.
- 1.7 The zones examined within this paper are:
 - § Zone 1A - Hereford City
 - § Zone 1B - Hereford Rural
 - § Zone 2 - Kington
 - § Zone 3 - Leominster
 - § Zone 4 - Bromyard
 - § Zone 5 - Ledbury
 - § Zone 6 - Ross-on-Wye

2 Catchment Population Profiles

- 2.1 This section describes the catchment population profiles for the Study Area and Zones. We describe the characteristics of each Zone separately comparing the key demographic trends against UK averages. The section concludes with an overview of the key findings and comments on the characteristics of the Study Area as a whole.
- 2.2 Data has been obtained from Experian Retail Planner Demographics Reports (obtained November 2007 & January 2008), which includes demographic data from the 2001 National Census.

Zone 1A - Hereford (City)

- 2.3 Zone 1A covers those postal sectors that comprise the built-up area of Hereford, which includes a postcode area extending to the south of the City.

Population Profile

- 2.4 In 2006, Zone 1A had a resident population estimated at 59,491. According to Experian, this figure represented an increase of 1,839 on the latest Census data available, which was published in 2001. Experian's 2006 estimate confirms that there were a total of 26,466 private households in Zone 1A which indicated a household occupancy rate of 2.3 persons. Experian also estimate that in 2006 the Zone had a higher than average number of adults of retirement age at 22% (national average 19%), and consequently a lower number of adults of working age (60% against a national average of 61%).

Economic Activity (16 - 74)

- 2.5 The economic activity rate in Zone 1A was 70% (28,611) which is above the national average of 66%. The 2001 Census states that the unemployed population was 1,357 persons, which represented 3.3% of those within the economically active range and is equivalent to the national average (3.3%).

Occupation (Approximated Social Grade)

- 2.6 The 2001 Census reveals that the breakdown in social grade varied slightly from UK national levels. The C1 category covering 'supervisory, clerical, junior manager/admin/prof' represented the dominant group at 28% of the population. Grades AB (higher & intermediate manager/admin/prof) were 17% below the national average (22%). The proportion of residents within the C2 category (skilled manual workers) was 4% higher than the national average for those aged 16 and over. This level of C2 occupation indicates the importance of skilled manual work to residents of this Zone.

Household and Family Cars

- 2.7 The level of households with no car (27%) was on par with the national average. This is an indication of mobility in this Zone.

Housing Tenure

- 2.8 Some 67% of houses in Zone 1A are owner-occupied, with 13% comprising socially rented housing. Whilst the ownership level is broadly the same as the national figures, the level of social rental is approximately 7% below national average. Private rented accommodation accounts for a further 6% of tenure figures.

Zone 1B - Hereford (Rural)

- 2.9 Zone 1B covers a large area of rural Herefordshire which surrounds Hereford city. As such the zone, the boundary of which extends towards the Welsh border in the South West, contains no key retail centres of significant size.

Population Profile

- 2.10 In 2006, Zone 1B had a resident population estimated at 41,076 which represented an increase of only 446 persons on the 2001 Census data. Experian's 2006 estimate is that there were a 16,990 private households in the Zone, which indicates a household occupancy rate of 2.4 persons. Experian also estimate that in 2006 the zone had a 5% higher proportion of adults at retirement age than the national average.

Economic Activity (16 - 74)

- 2.11 The economic activity rate in Zone 1B was 67% which was marginally above the national average of 66%. The unemployment rate, at 2.3% was well below the national average (3.4%).

Occupation (Approximated Social Grade)

- 2.12 Whilst variation across the categories was no more than 4% in any one category, there were noticeable differences in the approximated social grade for residents in Zone 1B against national averages. Of particular note is the lower figures for grade D employment (semi-skilled/manual workers), which could be an indication of the relative affluence of the zone. This is further emphasised by a proportion of those in grade AB, which was slightly above the national figure.

Household and Family Cars

- 2.13 The level of households with no car (10%) was significantly below the national average (27%), whilst the level of households with more than four cars was triple the national average. These figures are a clear indication of mobility in this zone, although, given the rural nature of the zone and the reduced public transport facilities, this is perhaps not surprising.

Housing Tenure

- 2.14 Zone 1B also contained a much higher of proportion of households that are owner occupied, with a figure of 75% compared to a national average of 68%. As such, the level of social rented housing was noticeably lower, at just 13% compared to a 20% national average.

Zone 2 - Kington

- 2.15 Zone 2 is located north west of Zones 1A and 1B, with Kington being the largest centre within its boundary.

Population Profile

- 2.16 In 2006, Zone 2 had a resident population estimated at 4,809, an increase of only 137 persons since the 2001 Census. According to Experian's 2006 estimate, there were 2,104 private households in Zone 2, which indicates a household occupancy rate of 2.3 persons. Experian also estimate that in 2006 the zone had a significantly higher than average number of adults of retirement age at 28% (national average 19%). This, combined with a much slower growth in children and infant population since the 2001 Census, indicates that this aging trend will continue in Zone 2.

Economic Activity (16 - 74)

- 2.17 The economic activity rate in Zone 2 was 67% (2,192 persons) which was slightly above the national average of 66%. The 2001 Census states that the unemployed population represented 2.3% of those within the economically active range. This figure was lower than the national average of 3.4%.

Occupation (Approximated Social Grade)

- 2.18 The 2001 Census reveals that the breakdown in social grade was largely consistent with UK national percentages in relation to grades C1, D and E. Grades AB and C2 varied slightly from the national averages, with a greater proportion of skilled manual workers (20%) than the UK average (15%). There was a noticeable under-provision of grade AB persons employed in the zone with the proportion employed in this field, some 7% lower than the national average.

Household and Family Cars

- 2.19 The level of households with no car within the zone was 17%, a figure well below the national average of 27%. Whilst the majority of household have one or two cars, the level of households with more than two cars was above the national average. The level of household with four or more cars also exceeded the national average with 3% compared to a national average of 1%. These above average figures are perhaps a reflection of geographical isolation and thus the need for multiple vehicles.

Housing Tenure

- 2.20 The level of owner occupation in this Zone, at 65% was slightly below the national average of 68%. A noticeable difference with national figures was the proportion of rented households. Social rented housing was 6% lower than the national average, whilst private rented housing was 7% higher.
- 2.21 Zone 2 had the lowest proportion of home ownership of all the Zones, and the highest proportion of private rented housing.

Zone 3 - Leominster

2.22 Zone 3 is located between Zones 2 and 4. Leominster is the largest centre within the Zone boundary.

Population Profile

2.23 In 2006, Zone 3 had a resident population estimated at 20,239 inhabitants. This figure represented a marginal increase of 807 since the 2001 Census. According to Experian's 2006 estimate, there were a total of 8,872 private households in Zone 3, which indicated a household occupancy rate of 2.3 persons. Experian also estimates that in 2006 the zone had a significantly higher than average number of adults of retirement age at 25.3% (national average 18.8%).

Economic Activity (16 - 74)

2.24 The economic activity rate in Zone 3 was 67% (9,289) which was marginally above the national average of 66%. The 2001 Census gives the unemployment population as 365, which represented 2.6% of those within the economically active range. This figure was lower than the national average of 3.4%.

Occupation (Approximated Social Grade)

2.25 The approximated social grade from the 2001 Census reveals that the breakdown in social grade was largely consistent with UK national percentages. The C1 category represented the dominant group at 30% of those who were economically active. Grade C2 accounted for 21% of those aged 16 and over. At 19%, the percentage of people in grade C2 was around 5% higher than the national average and was the highest proportion of all the Zones. This indicates the importance of skilled manual work to residents of the Leominster zone.

Household and Family Cars

2.26 The level of households with no car (18%) was well below the national average (27%). As a consequence the levels of car ownership were higher than the national average at all identified levels, with the majority of households having one or two cars.

Housing Tenure

2.27 71% of houses in Zone 3 were owner-occupied, a figure well above the national average. Consequently, the figure of 14% living in social rented housing was below average, whilst private rented housing was very close to the national average.

Zone 4 - Bromyard

2.28 Zone 4 is located immediately east of Zone 3, with Bromyard the largest centre within its boundary.

Population Profile

- 2.29 In 2006, the Bromyard Zone had a resident population estimated at 7,070, an increase of only 55 persons since the 2001 Census. According to Experian's 2006 estimate, there were 3,127 private households in Zone 4, which indicates a household occupancy rate of 2.3 persons. Experian also estimated that in 2006 the zone had a significantly higher than average number of adults of retirement age at 25.5% (national average 18.8%).

Economic Activity (16 - 74)

- 2.30 The economic activity rate in Zone 4 was 67% (5,030 people) which was slightly above the national average of 66%. The 2001 Census states that the unemployed population was 133, representing 2.6% of those within the economically active range. This figure was lower than the national figure of 3.4%.

Occupation (Approximated Social Grade)

- 2.31 The approximated social grade from the 2001 Census reveals that the breakdown in social grade was largely consistent with UK national percentages across all social grades. The greatest difference against national statistics was Grade C2 which was 4% higher than the national average. Grade C1 was the most dominant social grade in the Bromyard zone, in accordance with national average figures.

Household and Family Cars

- 2.32 The level of households with no car within the zone was 16%, a figure well below the national average of 27% and the lowest out of the seven zones. Whilst the majority of households had one or two cars, the level of households with three or more cars was noticeably higher than the national level. At 3% compared to a national average of 1%, the level of households with four or more cars appears to reflect geographical isolation and thus the need for multiple vehicles.

Housing Tenure

- 2.33 The level of owner occupation in Zone 4, at 71%, was above the national average of 68%. A noticeable difference with national figures was the proportion of rented households. Social rented housing was 6% lower than the national average, whilst private rented housing was 7% higher.

Zone 5 - Ledbury

- 2.34 Zone 5 is located immediately south of Zone 4, with Ledbury the largest centre within the Zone.

Population Profile

- 2.35 In 2006, Zone 5 had a resident population estimated at 15,370 inhabitants, an increase of 406 since the 2001 Census. According to Experian's 2006 estimate, there were an estimated 6,800 private households in Zone 5, which indicates a household occupancy rate of 2.3 persons. Experian also estimated that in 2006 the zone had a higher than average number of adults of retirement age at 25.6% (national average 18.8%).

Economic Activity (16 - 74)

- 2.36 The economic activity rate in Zone 5 was 70% (7,342 people) which was above the national average of 66%. This figure was the highest of the seven Zones. Similarly unemployment figures taken from the 2001 Census show the unemployment rate as 2.2% of those within the economically active range - lower than the national average of 3.4%.

Occupation (Approximated Social Grade)

- 2.37 The approximated social grade from the 2001 Census reveals that the breakdown in social grade was largely consistent with UK national percentages across all social grades. In line with national figures, Grade C1 is the most dominant social grade in the Zone. Grade D represents the lowest proportion with 14% compared to the national average of 17%.

Household and Family Cars

- 2.38 The level of households with no car within the zone was 17%, a figure well below the national average of 27%. As with the other rural zones, the majority of households have one or two cars, with the level of households with three or more cars being noticeably higher than the national level.

Housing Tenure

- 2.39 The level of owner occupation in the Ledbury zone, at 74% was well above the national average of 68%. Private rented housing too was higher, with 10.7% of households, compared to a national average of 9.6%. Conversely the Zone had a lower proportion of social rented housing, 7.1% compared to the national average of 9.6%.

Zone 6 - Ross-on-Wye

- 2.40 Zone 6 is located south east of Zone 1 and south west of Zone 5. Ross-on-Wye is the largest centre within the zone boundary which stretches toward Monmouth in the south.

Population Profile

- 2.41 In 2006, Zone 6 had a resident population estimated at 20,774 persons, an increase of 649 since the 2001 Census. According to Experian's 2006 estimate, there were an estimated 8,985 private households in Zone 6 in 2006, which indicates a household occupancy rate of 2.3 persons. Experian also estimated that in 2006 the zone had a higher than average number of adults of retirement age at 25.7%, compared to a national average 18.8%.

Economic Activity (16 - 74)

- 2.42 The economic activity rate in Zone 6 was 68% (9,653) which was slightly above the national average of 66%. The 2001 Census states that the unemployed population comprised 376 people, representing 2.6% of those within the economically active range - below the national rate of 3.4%.

Occupation (Approximated Social Grade)

- 2.43 The approximated social grade from the 2001 Census reveals that the breakdown in social grade was largely consistent with UK national percentages across all social grades. Grade C1 (30% of the workforce) was the most dominant social grade in the Zone. The Ross-on-Wye Zone contained the highest proportion of Grade AB workers within the Study Area.

Household and Family Cars

- 2.44 The level of households with no car within the zone was 16%, a figure well below the national average of 27%. The majority of households within Zone 6 had one or two cars. The level of households with three or more cars was noticeably higher than the national level.

Housing Tenure

- 2.45 The level of owner occupation in Ross-on-Wye Zone, at 76%, was 8% higher than the national average. There was also a noticeable difference in the proportion of social rented housing, which at 12% was well below the national average. Private housing however, was at a proportion very similar to national figures.
- 2.46 When compared across the zones, it is clear that Zone 6 had the highest proportion of owner occupation, as well as a below national average proportion of private rented tenure.

Study Area Overall Findings

Population Profile

- 2.47 The population estimates, when broken down by age, reveal an aged population, as compared with the national average. In all zones the percentage of adults of retirement age is higher than average, with the Study Area figure being some 24% (5% higher than the national average). Conversely the number of adults of working age and younger, are both below the national average.

Economic Activity (16 - 74)

- 2.48 In terms of economic activity, the proportion of working age residents that are economically active is above the national average in all zones. When the zone figures are combined the average figure is circa 68%, 2% higher than the national average. The unemployment rate of the combined zones, at 2.73%, is below the national average of 3.4%.

Occupation (Approximated Social Grade)

- 2.49 Evidence on occupation is also largely consistent with national averages. As seen in the breakdown of individual zones, Grade C1 is by far the most dominant grade, whilst Grade C2 stands out with a figure 3.3% higher than the national average. Whilst the Study Area figure for Grade AB is circa 2% below the national average, it should be noted that Zone 5 (Ledbury) and Zone 6 (Ross-on-Wye) contain proportions of Grade AB workers exceeding the national average.

Car Ownership & Housing Tenure

- 2.50 Tenure and car ownership figures tend to have more pronounced divergence from the national averages. The level of households that are owner occupied is above average in all but one zone (Zone 2 - Kington). Similarly the level of social rented accommodation is below average in all zones and 4.4% lower across the Study Area. Car ownership levels too are significantly higher than the national average with 18.7% of Study Area households owning no cars/vans, compared to the national average of 27%.
- 2.51 Although the above indicators suggest that Hereford residents are relatively prosperous, they must be put into context and the disparities within the Zones noted. Zone 2 (Kington) for instance has house ownership rates below national average and nearly 10% behind Zone 6 (Ross-on-Wye). Such differences suggest a variation in socio-economic profile across Herefordshire.

3 Shopping Patterns

- 3.1 This section describes shopping patterns within the Study Area and seven Zones. It identifies shopping patterns for different categories of goods and also identifies expenditure loss to centres outside the County.
- 3.2 The analysis is based on telephone Household Interview Surveys within the Study Area, and On-street Interview Surveys within Hereford and the market towns undertaken by Research & Marketing in November 2007. The results of these Surveys have been used in the assessments of retail and leisure potential described in Paper 4.

Hereford City

- 3.3 Of the 1,501 respondents to the Household Telephone Survey, 891 lived within Zone 1. In terms of mobility, 76% of respondents stated that a car was always available for shopping purposes. Analysing the responses for Zones 1A & 1B separately reveals that 83% of respondents in Zone 1B indicated that a car was always available, compared to 69% for Zone 1A. These results reflect the rural character of Zone 1B.
- 3.4 The On-street Interview Survey for Hereford City Centre questioned 406 people and found that the majority (56%) were visiting Hereford for shopping purposes, with an additional 8% of visitors using services (such as banks and hairdressers). Of the total respondents to the On-street Interview Survey, 17% lived outside the Study Area.

Convenience Shopping – Zone 1

- 3.5 We have identified Zones 1A and 1B as representing Hereford City's principal catchment area for convenience goods.
- 3.6 Three large supermarkets in Hereford are identified in the Survey as the primary choice for main food and grocery shopping. Overall, these three foodstores accounted for 60.7% of responses across the combined zone. The Tesco store at Abbotsmead Road had the largest single share (23.3%), ahead of the Sainsburys Barton Yard store (21.4%) and the Morrisons store at Commercial Road (16%). Although substantially smaller, the Tesco Metro store in the town centre accounted for 13% of respondents, a much greater share than ASDA's Belmont Road store (6.4%). The remaining responses were almost entirely distributed across other convenience stores within Hereford City. There was little retail expenditure leakage beyond the wider Study Area from Zone 1 as a whole.

- 3.7 Respondents in Zone 1B visited a more varied range of stores than the Hereford City foodstores. Although still small percentages, the inclusion of centres such as Abergavenny, Hay-on-Wye and Kington demonstrate the geographical size of Zone 1B and distribution of the population.
- 3.8 The Zone 1 travel pattern for main food shopping was dominated by car/van usage with 68% of respondents being the driver and a further 17.7% being a passenger. Bus usage comprised 5.8% of respondents, with those who walk accounting for 5.5%.
- 3.9 The survey also revealed that 36.7% of Zone 1 residents interviewed buy clothes, cosmetics, books, CDs, DVDs, DIY equipment or electrical goods at the same store that they do their main food shopping. Despite this however, the results revealed that more than half (51.4%) of respondents do not link trips when doing main food shopping.

Comparison Shopping – Study Area

- 3.10 We have identified the Study Area as representing Hereford City's principal catchment area for comparison goods. This is consistent with its role and status as a sub-regional shopping centre.
- 3.11 Hereford City Centre is the dominant centre for all categories of comparison shopping across all zones in the catchment. The results for the Study Area as a whole demonstrate the dominance of Hereford, with the City as a whole attracting 71.4% of responses for clothing and footwear and 72.2% for personal and luxury goods.
- 3.12 Within the Study Area, 68.5% of respondents stated that in the past six months they had spent the most money on clothes, footwear and other fashion goods in Hereford City Centre. The remaining Herefordshire market towns (including out-of-centre retail stores/parks) only accounted for an additional 8.6% of responses. This clearly demonstrates Hereford's role as the primary centre within the Study Area. In terms of expenditure leakage a variety of other centres were identified; however the percentages for these were low, the highest being Cheltenham (3.6%), Worcester (2.9%) and Gloucester (2.8%).
- 3.13 Shopping for furniture, floor coverings and other household textiles was also well contained with 50.7% of respondents across the Study Area identifying Hereford City Centre as the location in which they spent most money. Retail parks and standalone stores within Hereford accounted for a further 20.6% of the market share, of which Hereford Retail Park represented the most significant share (12.4%). Beyond Hereford, only 13.7% of respondents identified the other Herefordshire market towns as locations for furniture, floor coverings and household textile purchases compared to the 71.2% who use Hereford (including retail parks/stand alone stores).
- 3.14 Hereford accounted for 79.5% of Study Area electrical and domestic appliance purchases in the past six months, of which Hereford Retail Park represented for 22.5% of respondents. Expenditure leakage in these categories was also generally very low, with few centres mentioned that lie beyond the Study Area boundary.
- 3.15 78.8% of respondents of the whole Study Area used cars/vans (driver/passenger) for their non-food shopping trips. Buses and coaches accounted for a further 10.2%, whilst 8.3% walked. Only 0.7% of Study Area respondents identified trains as their primary travel choice.

- 3.16 30.6% of Study Area respondents purchased comparison items whilst doing their main food shop.

Leisure - Study Area

- 3.17 As with comparison shopping, we have identified the Study Area as representing Hereford City's principal catchment area for leisure and related activities.
- 3.18 Of the 38% of respondents who stated they visit the cinema, the Odeon in Hereford was identified by 13.5% of respondents, with the Cinema at the Courtyard identified by a further 5.7%. The Cineworld complex in Gloucester and Warner Village in Worcester were the next most popular with 3.1% and 2.3% responses respectively. Similarly, of those visiting gyms or sports centres, the largest proportion used facilities within Hereford (16.6%), of which the Leisure Centre and Leisure Pool accounted for a combined 10.6%.
- 3.19 There were significant numbers of trips elsewhere by those participating in cultural activities (museum/art gallery/theatre). Although the largest proportion of respondents (24.9%) stated that they visited Hereford most often for cultural activities, Great Malvern also featured with 7.3% of respondents and London with 8.2%.
- 3.20 This competition from facilities elsewhere was significantly reduced for Council services and financial/legal services, indicating the availability of such services locally.

Kington - Zone 2

- 3.21 Of the 1,501 people who completed the Household Telephone Survey, 42 lived within Zone 2.
- 3.22 The On-street Interview Survey within Kington town centre questioned 150 people and found that the majority were visiting Kington for shopping and services purposes. Of the total respondents to the On-street Interview Survey, 16% lived outside the Study Area.

Convenience Shopping

- 3.23 Within Zone 2, the Co-Op store was by far the most popular facility with 46.3% of respondents stating that it was their main food shopping destination, whilst the local stores of Kington accounted for another 14.3%. However, 24.4% of respondents stated that Morrisons in Leominster was their main food shopping destination. Other than Leominster, Hereford had a noticeable draw with retailers in Hereford (including standalone stores and retail parks) attracting 12.3% of respondents.
- 3.24 Only 40.5% of those doing main food shopping linked this with purchasing other goods, compared with 48.6% in Zone 1. Car use dominated travel patterns with 80.9% of respondents using a car as either a passenger or driver.

Comparison Shopping

- 3.25 Despite Kington being the largest centre in Zone 2, the highest proportion of residents stated that they undertook comparison shopping in Hereford. Hereford represented 62.4% of responses for clothing, footwear and fashion, compared with 21.9% who identified Kington. Also there were a limited number of respondents identifying Kington for other comparison goods categories such as furniture and electrical goods.

- 3.26 Aside from expenditure leakage to Hereford, Leominster was also attractive to Kington residents for other goods categories. For instance, 10.8% of residents visited Focus in Leominster for DIY and decorating goods, with a further 5.4% identifying Leominster town centre itself.

Leisure

- 3.27 Whilst again Hereford dominated all aspects of leisure, it is important to note that 14.4% of respondents stated they travel beyond Herefordshire to visit the cinema, with respondents visiting cinemas as distant as Swansea and Telford.
- 3.28 Kington fared better in responses regarding gym and sports centre use, with 14.3% using facilities in the town and Cloud 9 Health Club being the most popular at 7.1%. Council, financial and legal services also fared well given Kington's size, with 21.4% of residents using Council Services and 28.6% using financial and legal services within the town.

Leominster - Zone 3

- 3.29 Of the 1,501 people who completed the Household Telephone Survey, 183 lived within Zone 3.
- 3.30 The On-street Interview Survey within Leominster town centre questioned 153 people and found that the majority were visiting Leominster for shopping purposes, although the number of people visiting service facilities was also notable. Of the total respondents to the On-street Interview Survey, 19% lived outside the Study Area.

Convenience Shopping

- 3.31 Main food and grocery shopping in Zone 3 is dominated by the Morrisons store in Leominster, with 60.3% of respondents identifying the store as their primary choice. Although attracting considerably fewer responses, the Somerfield store in the town centre gained the second highest response, with 16%. When combined with the Aldi and other local stores in Leominster, the convenience stores in Leominster accounted for 85.6% of responses in the Zone.
- 3.32 The remaining 14.4% of respondents predominantly travelled to Hereford with the Tesco store in Ludlow the only store outside the Study Area to be identified by any significant proportion (2.7%).
- 3.33 The overwhelming majority of those undertaking main food shopping in Zone 3 (85.8%) stated that the car is their normal method of travel. Bus/coach usage was 2.7%, whilst 8.7% of respondents walked to do their food shopping.
- 3.34 64.5% of respondents did not link trips when undertaking main food shopping, although around one quarter stated that they do buy clothes, cosmetics, books, CDs, DVDs, DIY equipment or electrical goods in the same store as their grocery shopping.

Comparison Shopping

- 3.35 Leominster town centre attracted 17.4% of respondents' spend on clothing, footwear and other fashion goods. Whilst Hereford dominated in the furniture and electrical goods categories, Leominster performed well in the DIY and decorating supplies category, with 66% identifying the town and Focus store as their principal destinations. The remaining 33.9% of respondents visited Hereford and its retail parks for DIY and decorating supplies.

- 3.36 Leominster also performed well in retaining personal and luxury goods expenditure, with 42.6% of the market share. It should be noted that with the exception of Hereford, very little expenditure in this category leaked beyond the Zone.

Leisure

- 3.37 Ludlow and Worcester were the dominant cinema locations attracting 7.3% and 4.3% respondents respectively. A good level of gym/sports centre provision within the town is reflected in the retention of these trips within Zone 3. Leominster Leisure Centre was the most visited location (15.3%), followed by Bridge Street Sports Centre (5.5%).
- 3.38 Whilst the Zone performed well in terms of visits for Council, Financial and Legal Services, it performed very poorly for cultural activities. Only 2.2% of respondents identified Leominster as their primary location for museum, art gallery or theatre visits. This compares to 7.1% who identified Great Malvern and 5.5% who identified London.

Bromyard - Zone 4

- 3.39 Of the 1,501 people who completed the Household Telephone Survey, 63 lived within Zone 4.
- 3.40 The On-street Interview Survey within Bromyard town centre questioned 151 people and found that the majority were visiting Bromyard for shopping purposes. Of the total respondents to the On-street Interview Survey, 21% lived outside the Study Area.

Convenience Shopping

- 3.41 The Co-Op store in Bromyard was identified by 44.4% of respondents. The locations identified for main food shopping outside the Zone were relatively evenly distributed. Leominster and Hereford were notable in attracting customers from this Zone, with Tesco's store at Abbotsmead Road in Hereford attracting 11.1% and Morrisons in Leominster attracting 7.9%. Outside the County, Waitrose in Great Malvern was the only notable identified centre, although the actual proportion of respondents was small at 3.2% (2 people).
- 3.42 Given the geographical spread of convenience stores visited, it is unsurprising that cars/vans were identified as the primary method of transport at 90.5% of respondents visiting as either passenger or driver. Some 63.5% of respondents stated that they linked trips during their main food shop with nearly half buying items such as clothes and CDs in the same store as their groceries.

Comparison Shopping

- 3.43 Only a small proportion of respondents identified Bromyard as their destination for comparison goods shopping, indicating its small size and limited offer. Bromyard expenditure leakage was the highest of all the Zones. Although Hereford was the most popular comparison goods destination, Worcester attracted 32.6% visiting for clothing, footwear and other fashion goods, 26.2% for electricals and 26.8% for personal and luxury goods.
- 3.44 Despite its small size, Bromyard did perform relatively well in the furniture goods category, attracting 26.2% of respondents. This no doubt reflects the number of antique goods and craft furniture units in the town. However, none of the respondents from Zone 4 stated that they use Bromyard for electrical shopping.

Leisure

- 3.45 Bromyard performed relatively well in the leisure category. Whilst the largest proportion of respondents visit cinemas in Worcester, the Conquest Theatre in Bromyard was identified by 3.2% of respondents for cinema visits. At 17.5% of responses, the number of residents identifying Bromyard for museums, art galleries and theatres was strong. This figure compares well to the 6.3% who travelled to Hereford and 11.1% to Great Malvern.
- 3.46 Sports centres and gyms generated another strong response from residents, with 28.6% stating they usually visit Bromyard Leisure Centre. The only other site to feature in responses was the 1.6% who visit Bodyworx Gym in Hereford. With 33.3% of respondents, Bromyard also performed well for financial and legal services, a figure more than double those who visit Hereford for the same services.

Ledbury - Zone 5

- 3.47 Of the 1,501 people who completed the Household Telephone Survey, 139 lived within Zone 5.
- 3.48 The On-street Interview Survey within Ledbury town centre questioned 150 people and found that the majority were visiting Ledbury for shopping purposes. Of the total respondents to the On-street Interview Survey, 31% lived outside the Study Area.

Convenience Shopping

- 3.49 Convenience shopping in Zone 5 is led by the Tesco store in Ledbury which accounted for 53.2% of respondents, followed by the Somerfield store in the town centre with 27%. Ledbury town centre was the preferred location for main food and grocery shopping for 83.2% of respondents. Remaining responses identified a range of stores in Hereford, plus 4.4% who identified Waitrose in Great Malvern as their destination.
- 3.50 The proportion of shoppers who undertook linked trips associated with their main food shop was the lowest of the Zones, with only 34.8% of shoppers purchasing comparison items at the same time.
- 3.51 The travel pattern for main food shopping was once again dominated by car/van usage, with 85.5% travelling by car, compared with 10.1% who walked and 1.4% who used a bus/coach.

Comparison Shopping

- 3.52 Because of the close proximity of the town to competing centres outside Herefordshire, there is significant comparison goods expenditure loss in Zone 5. For clothing, Ledbury (the largest centre within the Zone), was the preferred location for only 9.5% of respondents. The number of respondents named Worcester, whilst a further 10.3% chose Gloucester and 8.7% chose Cheltenham. Although Ledbury retained greater levels of spend across the other comparison categories, competing destinations including Hereford continually featured in residents' responses.
- 3.53 42.1% of respondents stated that they spend most money on personal and luxury goods in Ledbury, which reflects the range of facilities available in the town. This figure compares favourably with 21.8% who identified Hereford and 13.1% who identified Cheltenham.

Leisure

- 3.54 Although 2.9% of residents stated that they visit the Market Theatre in Ledbury to visit the cinema, the largest proportion of visits to the cinema were to facilities elsewhere. The Malvern Cinema (12.2%) and Cineworld complex in Gloucester (11.5%) represented the largest proportions of responses.
- 3.55 In terms of other leisure provision, Ledbury performed reasonably well, with the town accounting for the largest proportions of visits for sports centres/gyms and financial and legal services. A notable under-performance, however, was in cultural activities such as museums, art galleries and theatres, attracting only 4.3% of responses compared to 25.2% for Great Malvern and 10.1% for London. Such figures reflect both the perceived lack of facilities within the town and the willingness of residents to travel for such facilities.

Ross-on-Wye - Zone 6

- 3.56 Of the 1,501 people who completed the Household Telephone Survey, 183 lived within Zone 6.
- 3.57 The On-street Interview Survey within Ross-on-Wye town centre questioned 150 people and found that the majority were visiting Ross-on-Wye for shopping purposes or to use services. Of the total respondents to the On-street Interview Survey, 19% lived outside the Study Area.

Convenience Shopping

- 3.58 The two large supermarkets in Ross-on-Wye accounted for the majority of main food shopping destinations in Zone 6. The larger Morrisons supermarket attracted the most respondents at 52.4%, compared to Somerfield which attracted 16.1%. The remaining 32% of respondents visited a range of locations around the County for their main food shop, with the major supermarkets in Hereford each attracting small proportions of residents.
- 3.59 Expenditure leakage included 11.1% of respondents identifying the Waitrose store in Monmouth as their main food shopping location, and a further 2.8% of respondents identifying the Tesco store in Gloucester.
- 3.60 The majority of residents in Zone 6 undertaking their main food and grocery shopping did not link trips. Only 33.9% of respondents stated that they purchase a range of comparison items at the same time as their main food shop. This is well below the Study Area average of 43.1%.
- 3.61 The travel patterns of the respondents largely conformed to the Study Area average, with car/van the method of transport for 83% of respondents either as passenger or driver.

Comparison Shopping

- 3.62 Ross-on-Wye accounted for only 18.5% of responses in respect of most money spent on clothing, footwear and other fashion goods. The town had a fairly high level of expenditure leakage to other towns both within and outside the County. The survey responses indicated that Cheltenham (9.9%) and Gloucester (12.4%) were major competing centres for Ross-on-Wye within this comparison goods category.

- 3.63 Ross-on-Wye town centre was the primary choice for 54.8% of residents who had undertaken DIY and decorating supply retail in the past six months, by far the largest single category. The Overcross retail park contributed a further 8.8% of residents' spend in the town. There was limited expenditure leakage in this goods category.
- 3.64 Similarly, although less pronounced, Ross on Wye retained large amounts of consumer expenditure on electrical goods and personal and luxury goods.

Leisure

- 3.65 With no purpose-built cinema screen in the town, the majority of residents who visit the cinema stated venues in Gloucester (12.6%) and Newport (6.5%).
- 3.66 Ross on Wye does retain visits to gyms and sports centres, with over half of respondents who used facilities identifying Ross Health & Fitness as the location they visited most often. However, in terms of cultural activities, the town performed less well. Only 3.8% of respondents chose Ross-on-Wye for museum, art gallery and theatre visits, compared with 9.3% for Hereford, 6% for Great Malvern, and 6% for Cheltenham.
- 3.67 Figures for Council, legal and financial services however reflect the range of services available in Ross-on-Wye. A clear majority of respondents visited Ross-on-Wye for Council services (21.9%), with Hereford the second largest proportion (13.7%). Similarly 43.3% of respondents identified Ross-on-Wye for financial and legal services, far ahead of Hereford (4.9%).

Study Area Overall Findings

Convenience Shopping

- 3.68 As expected, convenience retailing in the catchment area is dominated by the range of stores available in Hereford. The four major supermarket chains combined (Tesco, ASDA, Sainsburys & Morrisons), accounted for 43% of main food shopping of residents within the Study Area. This figure rose to circa 67% within Zone 1 of which Tesco Abbotsmead Road represented the largest single share (23%).
- 3.69 Across the market towns it is also the major supermarket chains which dominate convenience responses within their zones. This is perhaps most apparent in Leominster, with 60.3% of respondents identifying the Morrisons store as their primary choice for comparison shopping. Similarly the Tesco store in Ledbury had a market share in Zone 5 of 53.2%, whilst Zone 6 responses were led by Morrisons with 52.4%. Kington and Bromyard also followed this trend with the Co-op stores featuring in 46.3% of Zone 2 (Kington) responses and 44.4% of Zone 4 (Bromyard) responses.
- 3.70 Within the Study Area as a whole 60.4% of respondents linked their main food shop with additional comparison shopping. Residents in Zone 1 had a noticeably higher proportion of linked trips,
- 3.71 Public transport only accounted for only 6.2% of trips for main food shopping, which, alongside the 75.9% of those who stated they always have a car available, emphasises the dominant use of private vehicles for convenience shopping.

Comparison Shopping

- 3.72 The survey results demonstrate the dominance of Hereford City Centre and Hereford City for comparison goods shopping. This is particularly noticeable for clothing, footwear and other fashion goods. In this category, Hereford City Centre accounted for 68.5% of responses across the Study Area. With the addition of the retail parks and stand alone stores within Hereford City this figure rises to 71.4%. This dominance is also evident within the other comparison goods categories and confirms that Hereford, is the primary choice for comparison retailing across the zones.
- 3.73 Although the market towns within individual zones often provide strong local representation, their influence within the Study Area as a whole is limited. The Herefordshire market towns (including out-of-centre retail stores/parks) were the first choice destination for only 8.6% of the Study Area responses in respect of clothing, footwear and other fashion goods purchases. Outside the Study Area Cheltenham, Worcester and Gloucester are the dominant destinations. However no individual centre outside the Study Area accounted for more than 3.6% of first choice responses in any goods category.
- 3.74 Although the City Centre is dominant within Hereford, the retail parks make significant contribution in the furniture, DIY and electrical goods categories. For instance, whilst Hereford City Centre accounts for 50.7% of responses regarding money spent on furniture, floor covering and other household textiles, the retail parks add a further 14% to this share.

Leisure

- 3.75 As with comparison goods, Hereford is also the most significant centre for leisure activities within the Study Area. Although Hereford drew the largest proportion of respondents for leisure activities such as cinema/gym and theatre visits, the market towns maintained some market share for council, financial and legal services, reflecting the local availability of such services. For instance, whilst 34.4% of respondents across the Study Area identified Hereford for visiting financial and legal services, the other market towns combined provided 19.1% of responses, with Leominster the greatest number (6.8%).
- 3.76 Centres outside the Study Area, however, also have a significant draw on respondents for some forms of leisure trips. The limited cinema provision within the County causes residents to travel to nearby competing centres such as Worcester and Gloucester. Similarly, residents are willing to travel substantial distances for museums, art galleries and theatres. For instance, 8.2% of respondents across all zones stated that they visit London most often for such cultural activities, whilst Great Malvern (7.3%) and Cardiff (1.4%) also draw residents.

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